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| <b>1.0</b> | <b>PHA Information</b><br>PHA Name: <u>McAllen Housing Authority</u> PHA Code: <u>TX028</u><br>PHA Type: <input type="checkbox"/> Small <input checked="" type="checkbox"/> High Performing <input type="checkbox"/> Standard <input type="checkbox"/> HCV (Section 8)<br>PHA Fiscal Year Beginning: (MM/YYYY): <u>07/01/2024</u> |
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| <b>2.0</b> | <b>Inventory</b> (based on ACC units at time of FY beginning in 1.0 above)<br><br>Number of PH units: <u>89</u> Number of HCV units: <u>1,359</u><br><br><u>Public Housing TX028000007 Retama Village I 64 units</u><br><u>Public Housing TX028000008 Retama Village II 25 Units</u> |
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| <b>3.0</b> | <b>Submission Type</b><br><input checked="" type="checkbox"/> 5-Year and Annual Plan <input type="checkbox"/> Annual Plan Only <input type="checkbox"/> 5-Year Plan Only |
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| <b>4.0</b> | <b>PHA Consortia</b> <b>Not Applicable</b> <input type="checkbox"/> PHA Consortia: (Check box if submitting a joint Plan and complete table below.) |
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| Participating PHAs | PHA Code | Program(s) Included in the Consortia | Programs Not in the Consortia | No. of Units in Each Program |     |
|--------------------|----------|--------------------------------------|-------------------------------|------------------------------|-----|
|                    |          |                                      |                               | PH                           | HCV |
| PHA 1:             |          |                                      |                               |                              |     |
| PHA 2:             |          |                                      |                               |                              |     |
| PHA 3:             |          |                                      |                               |                              |     |

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| <b>5.0</b> | <b>5-Year Plan.</b> Complete items 5.1 and 5.2 only at 5-Year Plan update. |
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| <b>5.1</b> | <b>Mission.</b> State the PHA's Mission for serving the needs of low-income, very low-income, and extremely low income families in the PHA's jurisdiction for the next five years:<br><br><b>Our mission is to ensure safe, decent and affordable housing, create opportunities for residents' self-sufficiency and economic independence and assure fiscal integrity by all program participants.</b> |
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**Goals and Objectives.** Identify the PHA’s quantifiable goals and objectives that will enable the PHA to serve the needs of low-income and very low-income, and extremely low-income families for the next five years. (Items 1 – 6) Include a report on the progress the PHA has made in meeting the goals and objectives described in the previous 5-Year Plan. (Items 7 – 12)

**GOALS AND OBJECTIVES 5-YEAR PLAN 2025- 2029**

**1- PHA Goal: Expanding the supply of assisted housing:**

- Apply for additional tenant-based vouchers when available.
- Submit NOFA/NOFO applications for funding and/or program changes that permit the expansion of housing as available.
- Reduce Public Housing vacancies by maintaining proper unit capital improvement needs subsequently reducing unit turnaround time. While keeping an active waiting list for quick unit assignment.
- Leverage private or other public funds to create additional affordable housing units.
- Work with community partners to expand services and upward mobility opportunities for targeted families.

**2- PHA Goal: Improve the quality of assisted housing:**

- Maintain high level of performance with programs as measured by HUD. (i.e SEMAP, PHAS & REAC)
- Maintain a high level of customer satisfaction by training staff in customer relations.
- Assure that unit maintenance and capital needs are addressed in a timely manner.
- Submit demolition and disposition of obsolete units and/or developments.
- Provide replacement units for disposed or demolished units as funding sources permit.

**3- PHA Goal: Increase assisted housing choices:**

- Conduct landlord outreach to expand the availability of units for the tenant-based Section 8 program.
- Educate Section 8 participants in the mobility of their voucher assistance and the benefits of locating in higher income and opportunity areas.
- Educate Section 8 participants in the ability to utilize their voucher toward homeownership.
- Utilize the opportunity to assign Tenant Based vouchers to Project Based Voucher for the purpose of expanding safe, decent, and affordable housing. The PHA intends to apply for funding in 2025 that would allow 25 units to be project based vouchers in the North- Northwest McAllen area. Additionally, the PHA intends to have an ownership interest in the proposed project and may use non-competitive selection for PBV assistance. The use of Project Based Vouchers in the proposed development would be new construction and consistent with the PHA annual plan by increasing assisted housing choices, improving the quality of assisted housing and expanding the supply of assisted housing.
- Maintain a understanding of changing regulations and opportunities to change programs for the expansion of affordable housing units and submit applications for such opportunities as the agency chooses.

**4- PHA Goal- Promote self-sufficiency and asset development of assisted households:**

- Increase of the number of program participants who are employed by partnering with community organizations who offer education, training, and job skills.
- Expand the resource of available community partners who offer self-sufficiency opportunities.
- Expand the resources of available community partners who can educate participants in the benefits of financial and asset management.
- Develop, manage, and maintain an effective Family Self-Sufficiency (FSS) Action Plan. Update annually or as needed.
- Increase the number of FSS program participants to one hundred twenty-five (125)

**5- PHA Goal- Ensure equal opportunity and affirmatively further fair housing:**

- Undertake affirmative measures to ensure access to assisted housing is available to families regardless of race, color, religion, national origin, sex, family status and disabilities.
- Encourage community investors and developers to construct housing with accessibility for families with disabilities.

**6- PHA Goal- Provide an improved living environment:**

- Offer a diverse opportunity of services for families such as self-sufficiency, education and training.
- For the elderly population, social entertainment activities and health awareness opportunities.
- Maintain measures of de-concentration by promoting mixed income developments and bringing higher income households within lower income developments.

PROGRESS REPORT FOR THE PREVIOUS 5-PLAN 2020-2024

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7- **PHA Progress: Expanding the supply of assisted housing:**

- 8- Apply for additional tenant based vouchers when available. No additional tenant based vouchers available during this progress report.
- 9- Submit NOFA/NOFO applications for funding and/or program changes that permit the expansion of housing as available. **PHA was successful in adding additional VASH vouchers, Emergency Housing Vouchers and Stability vouchers to portfolio. PHA intends to apply for funding that would permit 25 project based vouchers.**
- 10- Reduce Public Housing vacancies by maintaining proper unit capital improvement needs subsequently reducing unit turnaround time. While keeping an active waiting list for quick unit assignment. **PHA REAC Physical Inspection scored high and demonstrates a satisfactory performance in maintaining units and assets.**
- 11- Leverage private or other public funds to create additional affordable housing units. **Successful application to TDHCA Tax Credit program for the development of Hibiscus Village, a 96 unit development for multi-family.**
- 12- Work with community partners to expand services and upward mobility opportunities for targeted families. **Successfully working with McAllen School District and area partners for educational (GED) courses and self-sufficiency programs.**

8- **PHA Progress: Improve the quality of assisted housing:**

- Maintain high level of performance with programs as measured by HUD . (i.e SEMAP, PHAS & REAC) **High-Performer**
- Maintain a high level of customer satisfaction by training staff in customer relations. **Satisfactory outcome (minimal complaints) and continued education for staff.**
- Assure that unit maintenance and capital needs are addressed timely. **Work Order turnaround within 24 hrs. and HUD 99 REAC Physical Site Inspection Score**
- Submit demolition and disposition of obsolete units and/or developments. Successfully submitted a disposition application to assist with the Hibiscus Village tax credit development.
- Provide replacement units for disposed or demolished units as funding sources permit. **N/A**

9- **PHA Progress: Increase assisted housing choices:**

- Conduct landlord outreach to expand the availability of units for the tenant based Section 8 program. **Section 8 department maintains open communication for landlords and potential landlords. Annual Landlord Outreach. PHA is on a committee with other local PHAs to create and host a regional landlord symposium.**
- Educate Section 8 participants in the mobility of their voucher assistance and the benefits of locating in higher income and opportunity areas. **Section entry briefings and recertification introduce and reinforce mobility opportunities.**
- Educate Section 8 participants in the ability to utilize their voucher toward homeownership. **Successful outcome by partnering with Affordable Homes of South Texas families have been utilizing voucher for homeownership.**
- Utilize the opportunity to assign Tenant Based vouchers to Project Based Voucher for the purpose of expanding safe, decent and affordable housing. **PHA intends to apply for funding that would enable 25 Project Based Vouchers.**
- Maintain an understanding of changing regulation and opportunities to change programs for the expansion of the affordable housing units and submit application for such opportunities as the agency chooses. **PHA was awarded additional vouchers for the Emergency and Stability Vouchers program and has maintained high utilization rates.**

10- **PHA Progress- Promote self-sufficiency and asset development of assisted households:**

- Increase of the number of program participants who employed by partnering with community organizations who offer education, training and job skills. **73 families are currently enrolled in our Family Self-Sufficiency program.**
- Expand the resource of available community partners who offer self-sufficiency opportunities. **Working with local Workforce agency to promote job opportunities.**
- Expand the resources of available community partners who can educate participants in the benefits of financial and asset management.

11- **PHA Progress- Ensure equal opportunity and affirmatively further fair housing:**

- Undertake affirmative measures to ensure access to assisted housing is available to families regardless of race, color, religion, national origin, sex, family status and disabilities. **Successful application (no Complaints filed)**
- Encourage community investors and developers to construct housing with accessibility for families with disabilities. **Successful outreach to developers.**

12- **PHA Progress- Provide an improved living environment:**

- Offer a diverse opportunity of services for families such as self-sufficiency, education, and training. **Successful with education and training opportunities within the new Family Development Center. Monthly scheduled GED and Training sessions are conducted.**
- For elderly population provide for social entertainment activities and health awareness opportunities.

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- Maintain measures of de-concentration by promoting mixed income developments and bringing higher income households within lower income developments. **Successful with the scheduling of Social Activities for elderly and partnering with medical service providers for health education fairs.**

**PHA Plan Update**

(a) Identify all PHA Plan elements that have been revised by the PHA since its last Annual Plan submission:

- **Utility Allowance Schedule for Calendar Year 2024**
- **Payment Standard for Calendar 2024**
- **PHA HCV Administrative Plan 2024**

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

PHA Plan Elements (924 CFR 903.7) – All documents listed below are located at the administrative offices of the McAllen Housing Authority at 1200 N. 25<sup>th</sup> St., McAllen, Texas. or the PHA website [www.mcallenhc.org](http://www.mcallenhc.org)

1. The Public Housing Admissions and (Continued) Occupancy Policy (A&O/ACOP); the Section 8 Admin Plan which includes participant Eligibility for both programs; the Tenant Selection and Assignment Plan (TSAP) and the Waiting List Procedure.
2. The Capital Fund Grant Program Annual Statement / Performance and Evaluation Reports for any active grant year. Most recent board-approved operating budget for the public housing program
3. The Public Housing rent determination policies, including the method for setting public housing flat rents and schedule of flat rents are included in the PHA A&O Policy. The Housing Choice Voucher rent determination and payment standards are included in Section 8 Administrative Plan.
4. The Public Housing management and maintenance policy documents, including policies for the prevention or eradication of pest infestation.
5. The Public Housing grievance procedures are included in the PHA A&O Policy and Section 8 informal review and hearing procedures are included in Section 8 Administrative Plan.
6. There are no public housing developments which the PHA owns or operates that are Designated Housing for Elderly and Disabled Families. The PHA participates in a Voucher Base development for elderly/disabled/handicapped with 36 vouchers from its current allocation.
7. The Public Housing Community Service Policy/Programs for families in public housing developments are included in PHA A&O Policy.
8. The PHA contracts and provides security services with off-duty police officers at its developments for safety and crime prevention measures of the public housing residents. Officers document incidents for reporting and tracking purposes. PHA follows up with family counseling and lease enforcement as necessary. Officers also have arresting authority if incident requires such action.
9. The Policy on Ownership of Pets in Public Housing Family Developments is included in the PHA A&O Policy.
10. The documents reflecting that the PHA has examined its programs or proposed programs, identified any impediments to fair housing choice in those programs, addressed or is addressing those impediments in a reasonable fashion in view of the resources available, and worked or is working with local jurisdictions to implement any of the jurisdictions' initiatives to affirmatively further fair housing that require the PHA's involvement.
11. The results of the most recent fiscal year audit conducted by the PHA under the Single Audit Act as implemented by OMB Circular A-133, the results of that audit and the PHA's response to any findings are available upon request.
12. The PHA opted out of Asset Management.
13. The PHA has an MOU in place with Women Together/Mujeres Unidas that address matters involved with issues of domestic violence. The PHA has also set aside, depending upon funding, availability of vouchers for family unification and/or housing assistance to victims of domestic violence who have met the services program of Women Together and require housing to complete their program of work towards independence. The PHA adheres to VAWA processes in its assessment of incidents involving domestic disputes in assisted housing.

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**PHA Plan Update**

(a) Identify all PHA Plan elements that have been revised by the PHA since the last Annual Plan Submission:

The following PHA Plan elements marked 'R' have been revised since the last Annual Plan submission by the McAllen Housing Authority. 'NR' notes no revision and 'NA' denotes not applicable,

R 903.7 (1) Eligibility, Selection and Admission Policies, including Deconcentration and Wait List Procedures

NR 903.7 (2) Financial Resources

NR 903.7 (3) Rent Determination

R 903.7 (4) Operation and Management

NR 903.7 (5) Grievance Procedures

NR 903.7 (6) Designated Housing for Elderly and Disabled Families

NR 903.7 (7) Community Service and Self-Sufficiency

NR 903.7 (8) Safety and Crime Prevention

NR 903.7 (9) Pets

NR 903.7(10) Civil Rights Certification

NR 903.7(11) Fiscal Year Audit

NR 903.7(12) Asset Management

NR 903.7(13) Violence Against Women Act (VAWA)

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(b) Identify the specific locaton(s) where the public may obtain copies of the Annual and 5-Year Plan.

The following are the specific locations where the public may obtain copies of the 2024 Annual and 2025-2029 Five Year Plan:

- Administrative Office- 1200 N. 25<sup>th</sup> St., McAllen, Texas 78501
- PHA website - www.mcallenhc.org

**Plan Elements**

903.7 (1) Eligibility, Selection and Admissions Policies, including Decentration and Wait List Procedures

A. Public Housing

Public Housing policies that govern resident or tenant eligibility, selection and admission, unit assignment, procedures to maintaining waiting list for admissions to public housing and site-based waiting lists:

Eligibility-

The McAllen Housing Authority (PHA) verifies eligibility for admission to public housing when:

- Families are number (1) on the waiting list. Within 24 hours of the tenant advisement to vacate is received, eligibility for the next family is processed.

The PHA uses the following non-income screening factors to establish eligibility for admissions to public housing:

- Criminal or Drug related activity
- Rental history
- Housekeeping
- Eviction of Public Housing or Section 8 HCV Program for Drug or Criminal Activity

The PHA requests criminal records from the following enforcement agencies for screening purposes:

- Local law enforcement agencies
- State Law enforcement agencies
- FBI Criminal Records

#### Selection and Assignment-

Selection for admission to public housing shall be made from the PHA's current waiting list in accordance with the date and time of the application and applicable preference(s) as follows:

#### Preferences-

The PHA does not plan to exceed the federal targeting requirements by targeting more than 40% of all new admissions to public housing to families at or below 30% of median area income.

It is the policy of the PHA that the transfers will take precedence over new admissions in the following circumstances:

- Emergencies
- Over-Housed
- Under-Housed
- Medical Justification
- Administrative reasons determined by the PHA
- Domestic Violence
- Incentive Transfers-Modernized units can be filled with existing PH families provided they are in good standing with the PHA
- Deconcentration Transfers- to correct or avoid concentration of economically and deprived families within sites or between sites.

The PHA utilizes the following admission preferences:

- #1- Date & Time
- #2-Type of development and unit available

In relationship of preferences to income targeting requirements, the pool of applicant families ensures that the PHA will meet targeting requirements.

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#### Unit Assignment-

Applicants are ordinarily given two (2) vacant choices before they fall to the bottom of the waiting list. They are given new date and time based on the date of unit rejection. This policy is consistent across all waiting list types.

#### Maintaining Waiting List-

The PHA maintains a community-wide waiting list. Interested persons may apply for admission to public housing at the main administrative office located at 1200 N. 25<sup>th</sup> St. McAllen, Tx. 78501 or online at [www.mcallenhc.org](http://www.mcallenhc.org)

#### Occupancy-

Applicants and residents may use the following reference materials to obtain information about the rules and of occupancy of public housing:

- The PHA Resident Lease
- The PHA Admission and Continued Occupancy Policy
- PHA briefing seminars and seminar material

Residents must notify the PHA of changes in family composition at the time the change occurs and at the annual Reexamination.

#### Deconcentration and Income Mixing-

The PHA has performed its annual deconcentration and income mixing analysis to determine if the PHA has any general occupancy public housing developments covered by the deconcentration rule. The analysis results are as follows:

The PHA does not have general occupancy public housing developments covered by the deconcentration rule and none of the covered developments have average income that fall above or below the Established Income Range. Additionally, the PHA is below the 100 public housing unit threshold and is exempt from deconcentration.

B. Section 8 Home Choice Voucher Program

Section 8 HCV policies that govern participant eligibility, selection for assistance and procedures for maintaining waiting list.

Eligibility-

The PHA conducts screening to the extent of:

- Criminal or Drug related activity only to the extent required by law or regulation.
- Past Fraudulent History related to any Federal Housing Program

The PHA requests criminal records from the following enforcement agencies for screening purposes:

- Local Law enforcement agencies
- State law enforcement agencies
- FBI Criminal Records

Waiting List Organization-

The PHA waiting list for the Section 8 Home Choice Voucher tenant-based assistance is merged with the other program waiting list.

Interested persons may apply for admission to Section 8 HCV program assistance at:

- PHA main administrative office; 1200 N. 25<sup>th</sup> St., McAllen, Texas 78501 or at [www.mcallenhc.org](http://www.mcallenhc.org)

Search Time-

PHA does give extensions on the standard 60-day search period for a unit under the following circumstances:

- Hard to house
- Other good cause

Preferences-

The PHA does not plan to exceed the federal targeting requirements by targeting more than 75% of all new admissions to the Section 8 HCV program to families at or below 30% of the median area income.

The PHA employs the following priority preferences:

- 1 Rental Assistance Demonstration (RAD)
- 2 Project Based Voucher (PBV)
- 3 Date and Time

Among applicants on the waiting list with equal preferences status applicants are selected based on Time & Date of application.

In relationship of preferences to income targeting requirements, the pool of applicant families ensures that the PHA will meet income targeting requirements.

Special Purpose Section 8 Assistance Programs-

The policies governing eligibility, selection and admissions to any special purpose Section 8 program administered by the PHA are contained in the following documents or other referencing material:

- The Section 8 HCV Administrative Plan
- Briefing sessions and materials.

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903.7 (2) Financial Resources

| Financial Resources<br>Planned Sources and Uses           |                          |   |
|---|--------------------------|---|
| Source  | Amount                   | Use   |
| 2024 Public Housing Operating Fund                        | \$200,000                | PHA Management/Operations   |
| 2024 Public Housing Capital Fund                          | \$165,000                | Capital Improvements & Operations                                     |
| 2024 Section 8 HCV awards                                 |                          |   |
| HAP<br>Administration                                     | \$8,121,292<br>\$959,330 | Tenant Based Rental Assistance<br>Operation/Administration of Program |
| 2024 Family Self-Sufficiency/FSS                          | \$53,300                 | Operation/Administration of Program                                   |
|   |                          |   |
| Non-Dwelling Rental Revenue                               | \$42,000                 | HCV Admin Services  |
|   |                          |   |
| Tax Credit Development Revenue                            | \$15,000                 | Public Housing Supportive Services                                    |
|   |                          |   |
| 2023 Public Housing Capital Fund<br>(Unobligated balance) | \$136,283.10             | Capital Improvements & Operations                                     |
|   |                          |   |
|   |                          |   |
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|   |                          |   |
| <b>Total Resources</b>                                    | <b>\$9,692,205</b>       |   |

903.7 93) Rent Determination Policies

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Public Housing

Income Based Rent Policies-

a. Use of discretionary policies

The PHA will employ discretionary rent setting policies for income-based rent in Public Housing.

b. Minimum Rent

The PHA's minimum rent is \$50.00.

The PHA has adopted the following discretionary minimum rent hardship exemption policies:

- Under certain circumstances, the family may request a waiver in writing and the PHA may grant request for up to 90-days.

c. Rents set at less than 30% than adjusted income

The PHA does not plan to charge rents at fixed amount or percentage less than 30% of adjusted income.

d. Discretionary deductions and/or exclusion policies

The PHA does not plan to employ any discretionary (optional) deductions and/or exclusion policies.

e. Ceiling Rents

The PHA does not have ceiling rents

f. Rent Re-determinations

Between annual income reexaminations the tenant is required to report changes in income or family composition to the PHA such that changes result in an adjustment to rent as follows:

- Any Time the family experiences an income increase or decrease
- Changes in family composition



- g. Individual Savings accounts (ISA's)  
The PHA does not plan to implement individual savings accounts for residents as an alternative to the required 12 month disallowance of earned income and phasing in the rent increase in the next year.

Flat Rent-

The PHA used the following sources of information in setting the market-based flat rent to establish comparability and assurance that flat rent is set to no less than 80% of area FMR.

- The Section 8 rent reasonableness study of comparable housing.

Section 8 HCV Tenant-Based Assistance

Payment Standards-

The PHA's payment standard is:

- At or above 90% but below 110% of SAFMR
- 1 Bedroom units 105% of SAFMR
- 2 Bedroom units 105% of SAFMR
- 3 Bedroom units 105% of SAFMR
- 4 Bedroom units 105% of SAFMR

Minimum rent-

The PHA's minimum, rent is \$50.00.

The PHA has adopted the following discretionary minimum rent hardship exemption policies:

- Waiting period for eligibility for federal, state or local financial assistance
- Change in family income due to separation, divorce or abandonment
- Loss of employment
- Family would be evicted as a result of imposing minimum rent
- Death in Family
- Other hardships as determined by the PHA such as but not limited to no-receipt of alimony/child support etc.

**6.0** 903.7 (4) Operation and Management

PHA Management Structure-

- a. A brief description of the management structure and organization of the PHA  
The Executive Director directs the day-to-day management and operation of the Housing Authority with the assistance of the Deputy Director, The following are the department manager positions:
- Housing Choice Voucher Program Manager
  - Maintenance Supervisor
  - Finance Director
- b. HUD programs under PHA Management
- Public Housing – 89 units
  - Section 8 HCV Program- 1,359
- c. Management and Maintenance Policies  
The PHA has adopted the following policies that contain the Agency's rules, standards and policies that govern management, operation and maintenance of the Public Housing and Section 8 HCV programs:

Public Housing Management

- Admissions and Continued Occupancy Policy (ACOP)
- Maintenance Work Plan
- Pet Policy
- Transfer Policy
- Grievance Policy
- Community Service Policy
- VAWA Policy
- Schedule of Charges

Section 8 HCV Management

- Administrative Plan, includes VAWA, Homeownership, and EHV

903.7 (5) Grievance Procedures

a. Public Housing

The PHA has not established any written grievance procedures in addition to federal requirements found at 24 CFR Part 96, Subpart B, for residents of public housing.

Residents or applicants who desire to initiate the PHA grievance process should contact the following:

- PHA main administrative office; 1200 N. 25<sup>th</sup> St., McAllen Tx. 78501

b. Section 8 HCV Tenant-Based Assistance

The PHA has not established informal review and informal hearing procedures for applicants to the Section 8 HCV Tenant-Based Assistance program in addition to federal requirements at 24 CFR 982.

Section 8 HCV applicants or assisted families who desire to initiate the informal review and informal hearing process should contact the following:

- PHA main administrative office; 1200 N. 25<sup>th</sup> St., McAllen Tx. 78501

903.7 (6) Designated Housing for Elderly and Disabled Families

The PHA has not designated or applied for approval to designate or does not plan to apply to designate any public housing for occupancy only by the elderly families or only by families with disabilities, or by elderly families and families with disabilities or will not apply for designation for occupancy by only elderly families or only families with disabilities, or by elderly families with disabilities as provided by section 7 of the U.S. Housing Act of 1937 (42 U.S.C. 1437e) in the upcoming fiscal year.

903.7 (7) Community Service and Self-Sufficiency

a. PHA Coordination with the Welfare Agency (TANF)

The PHA has not entered into a cooperative agreement with the TANF agency, to share information and/or target supportive services (as contemplated by section 12(d)(7) of Housing Act of 1937)

Other coordination effort between the PHA and TANF agency include:

- Coordinate the provision of specific social and self-sufficiency services and programs to eligible families
- Jointly administer programs
- Partner to administer a HUD Welfare-to-Work voucher program when available
- Joint administration of other demonstration programs as they materialize.

b. Services and programs offered to residents and participants by the PHA are as follows:

Self-Sufficiency-

The PHA will employ discretionary policies to enhance the economic and social self-sufficiency of assisted families in the following areas:

- Public housing rent determination policies
- Public housing admissions policies
- Section 8 HCV admissions policies
- Preferences in admission to Section 8 HCV for certain public housing families
- Preference/eligibility for public homeownership option participation
- Preference/eligibility for Section 8 HCV homeownership participation

Economic and Social self-sufficiency programs-

The PHA does coordinate, promote or provide services or programs for residents and participants.

| Service Description | Estimate Number | Allocation Type | Access Site               | Eligible Participants |
|---------------------|-----------------|-----------------|---------------------------|-----------------------|
| English Language    | 15              | PH/Sec. 8 HCV   | Family Development Center | PH/Sec 8 HCV          |
| Financial Planning  | 25              | PH/Sec. 8 HCV   | Family Development Center | PH/Sec. 8 HCV         |
| Homeownership       | 25              | PH/Sec. 8 HCV   | Family Development Center | PH/Sec. 8 HCV         |

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|                                     |     |               |                           |               |
|-------------------------------------|-----|---------------|---------------------------|---------------|
| Scholarship Program                 | 15  | PH/Sec. 8 HCV | Family Development Center | PH/Sec. 8 HCV |
| Annual Health Fair                  | 100 | PH/Sec. 8 HCV | Family Development Center | PH/Sec. 8 HCV |
| Summer Lunch Program                | 50  | PH/Sec. 8 HCV | Family Development Center | PH/Sec. 8 HCV |
| Nutrition Classes for Elderly       | 50  | PH/Sec. 8 HCV | Family Development Center | PH/Sec. 8 HCV |
| GED                                 | 10  | PH/Sec. 8 HCV | Family Development Center | PH/Sec. 8 HCV |
| M.I.S.D. Parent Involvement Program | 10  | PH/Sec. 8 HCV | Family Development Center | PH/Sec. 8 HCV |

Family Self-Sufficiency programs-

| Program                        | Required Participants | Actual Participants (01/31/2024) |
|--------------------------------|-----------------------|----------------------------------|
| Public Housing & Section 8 HCV | 25                    | 73                               |

Welfare Benefit Reductions-

The PHA is complying with statutory requirements of section 12(d) of the U.S. Housing Act of 1937 (relating to the treatment of income changes resulting from welfare program requirements) by:

- Adopting appropriate changes to the PHA's public housing rent determination policies and training staff to carry out those policies
- Informing residents of new policy on admission and reexamination
- Actively notifying the public and residents of new policy as it is adopted
- Establishing or pursuing a cooperative agreement with all appropriate TANF agencies regarding the exchange of information and coordination of services
- Establishing a protocol for exchange of information with all appropriate TANF agencies.

Community Service Requirements-

Pursuant to section 12(c) of U.S. Housing Act of 1937, the PHA will comply with requirements of community service by identifying the number of tenant required to perform community service, the number of tenants granted exemptions, the number of tenants in non-compliance, and the number of tenants terminated/evicted due to non-compliance.

- Number of tenants required to perform community service 4
- Number of tenants performing community service 2
- Number of tenants granted exemptions 77
- Number of tenants in non-compliance 2
- Number of tenants terminated/evicted due to non-compliance 0

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903.7 (8) Safety and Crime Prevention

The PHA's plan for safety and crime prevention to ensure the safety of the public housing residents is addressed as follows:

Need for measures to ensure safety of public housing residents-

Description of the need for measures to ensure the safety of public housing residents:

- High incidence of violent and/or drug related crime in some or all of the PHA's developments
- High incidence of violent and/ or drug related crime in areas surrounding PHA's developments
- Resident fearful for their safety and/or the safety of their family members
- Observed lower-level crime, vandalism and/or graffiti.
- People on waiting list unwilling to move into one or more developments due to perceived and/or actual levels of violence and/or drug related activity.

Information or data used by the PHA to determine the need for PHA actions to improve safety of residents:

- Safety and security survey of residents
- Analysis of crime statistics over time for crime committed "in and around" public housing developments.
- Analysis of cost trends over time for the repair of vandalism and removal of graffiti
- Resident reports

- PHA employee Reports
- Police Reports
- Fire Department Reports
- Demonstrable, quantifiable success with previous or ongoing anti-crime & anti-drug programs

Developments that are most affected

- All Development and PHA properties

Crime and Drug Prevention activities the PHA has undertaken or plans to undertake.

List of crime prevention activities:

- Contracting with outside and/or resident organization for the provision of crime and/or drug prevention activities
- Crime Prevention through environmental design
- Activities targeted to at-risk youth, adults or seniors
- Volunteer resident patrol/block watchers program
- Notices of safety measures are distributed
- Off-duty Police Officers are hired to patrol all PHA properties

Developments that are most affected:

- All Developments and PHA properties

Coordination between PHA and Police.

Description of the coordination between the PHA and the appropriate police precinct for carrying out crime prevention measures and activities:

- Police involvement in development, implementation, and/or ongoing evaluation of drug-elimination plan
- Police provide crime data to housing authority staff for analysis and action
- Police have established a physical presence on housing authority developments and properties
- Police regularly testify in and otherwise support eviction cases
- Police regularly meet with PHA management and residents
- Agreement between PHA and local law enforcement agency for provision of above baseline law enforcement services.

Developments that are most affected:

- All Developments and PHA properties

6.0

#### 903.7 (9) Pets

Description of Pet Policy-

All residents are permitted to own and keep common domesticated household pets. Common household pet means a domesticated cat, dog, bird, gerbil, and hamster. Guinea pig, and fish in aquariums. Reptiles of any kind, as well as mice and rats are prohibited. Small turtles or lizards in a terrarium are permitted. These definitions do not include any wild animal, bird of prey, dangerous fish, snakes, spiders or other insects, or any farm animal.

Each household shall have only one (1) pet (except fish or birds). The limit for bird is two (2).

Pet owner may have only a small cat or a small dog. Limitations: weight not to exceed twenty (20) pounds; height shall not exceed fifteen (15) inches. This does not apply to service animals that assist persons with disabilities.

Pet owner must agree to abide by the PHA's Pet Ownership Rules. Pet owners shall license their pets (if required by state law or local ordinances) yearly with the City of McAllen or as required. The pet owner must show the PHA proof of rabies and distemper booster inoculations and licensing annually.

Pet owner must not violate any state or local health or humane laws. Pet must be spayed or neutered at the cost of the owner. A veterinarian shall verify the spaying and neutering has been accomplished. All cats shall be declawed and proof of compliance shall be furnished to management.

Pet must be maintained on leash and kept under control when taken outside the unit.

No resident shall keep, raise, train, breed or maintain any pet of any kind at any location, either inside or outside the dwelling unit, for any commercial purpose.

No resident shall keep a vicious or intimidating pet on premises (i.e. Pit bulls, or any other vicious or intimidating breed). Any animal identified as dangerous or vicious by state law or local ordinances will be prohibited.

No pet owner shall permit his or her pet to disturb, interfere or diminish the peaceful enjoyment of the pet owner's neighbors or other residents.

Each pet owner shall pay a non-refundable pet fee of \$200.00 and a refundable pet deposit of \$50.00. A refundable pet deposit of \$50.00 will be assessed for caged animals such as; birds, gerbils, hamsters, guinea pigs or turtles and is intended to cover costs directly attributable to the pet's presence. The non-refundable pet fee is intended to cover the reasonable operating costs to the development directly attributed to a pet or pets in the unit (i.e. fumigation of a unit). Elderly/Handicapped will pay a \$200.00 refundable pet fee and no deposit will be charged for caged animals.

Animals that are used to assist the disabled (pertaining to ownership of service animals) are excluded from the size, weight, type and non-refundable fee requirements; however, they will be required to assure that the proper licensing, inoculations, leash restraints, etc. in accordance with the State and Local ordinances are observed. Residents needing a service animal must provide documentation and/or verification for this need and that the animal is considered to be a service animal from a recognized and proper authority.

Please see complete pet ownership rules in the Pet Policy provided by the PHA.

#### 903.7 (10) Civil Rights Certification

The PHA has examined its programs and proposed to identify any impediments to fair housing choices, has addressed those impediments in a reasonable fashion, and is working with the local jurisdiction to implement any of the jurisdiction's initiatives to affirmatively further fair housing. The PHA assures that the annual plan is consistent with any applicable Consolidated Plan for its jurisdiction.

The PHA has taken the following specific actions to Affirmative Further Fair Housing in its public housing and Section 8 HCV programs.

The PHA **will not**, on grounds of race, color, creed, sex, religion, age, disability, national origin or familial status:

- Deny a person or family admission to housing assistance programs
- Provide housing which is different than that provided others, except for elderly and/or disabled where accessibility features may be required
- Subject a person to segregation or disparate treatment
- Restrict a person's access to any benefit enjoyed by others in connection with the housing program
- Treat a person differently in determining eligibility or other requirements for admission or assistance
- Deny any person access to the same level of services provided others
- Deny a person the opportunity to participate in a planning or advisory group that is an integral part of housing programs

The PHA will not intimidate, threaten or take any retaliatory action against any applicant, resident, or participant because of a person's participation in civil rights activities or assertion of civil rights.

HUD Fair Housing Posters are posted at the PHA main administrative office and at each development office.

The PHA will ensure accessibility to offices to afford persons with disabilities the opportunity to apply for admission or assistance to the public housing programs.

The PHA will make sure that all employees of the PHA are familiar with non-discrimination requirements, especially those employees who are involved in the admissions process.

The PHA prominently displays a fair housing poster at each office where applications are taken and at each management office.

The PHA's policies and practices are designed to provide assurance that all persons with disabilities will be provided reasonable accommodations so that they can fully access utilize the housing programs and related services.

The PHA will identify and eliminate situations and/or practices that create barriers to equal housing opportunities for all.

The PHA reviews its policies and procedures, at least annually, to assure compliance with civil rights requirements

6.0

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|-----|---|
|     | <p>903.7 (11) Fiscal Year Audit</p> <p>The PHA is required to have an audit conducted under section 5(h) (2) of the U.S. Housing Act of 1937 (42 U.S.C. 1437 c(h) ).</p> <p>The most recent fiscal audit was submitted to HUD. There were no findings as a result of the audit.</p> <p>903.7 (12) Asset Management Not Applicable</p> <p>903.7 (13) Violence Against Women Act (VAWA)</p> <p>The PHA adheres to VAWA processes in its assessment of incidents involving domestic disputes in assisted housing. The current Admissions and Continued Occupancy policy (ACOP) and the Section 8 HCV Administrative Plan include VAWA processes.</p>   |
| 7.0 | <p><b>Hope VI, Mixed Finance Modernization or Development, Demolition and/or Disposition, Conversion of Public Housing, Homeownership Programs, and Project-based Vouchers.</b> <i>Include statements related to these programs as applicable.</i></p> <p>(a) McAllen Housing Authority continues to solicit properties in anticipation of undertaking another mixed finance development to increase inventory for families in need of housing and/or to replace the 61 public housing units that were demolished in prior years' demolition activity. Financing for these developments will be any of following individually or in combination as required; Capital Fund Financing Program, Replacement Housing Factor Funding, Public Housing Operating Funds, Local, State, Federal and Private funding sources.</p> <p>(b) Homeownership – The McAllen Housing Authority continues to market its Voucher Homeownership program that affords voucher participants the opportunity to purchase their own home. The program has assisted fifty-five (55) families since its inception in July 2004. Of the fifty-five families assisted, forty-one have “graduated” towards no longer needing voucher assistance. Family Self-Sufficiency (FSS) Program is also in place to assist families from a rental environment into homeownership. Funding was awarded for 25 voucher participants and PHA will continue to solicit funding for family transitioning into homeownership with this program.</p> <p>(c) Project Based Vouchers- The McAllen Housing Authority may elect to project base a portion of its Tenant Based vouchers as permitted by federal regulation and/or may submit applications via NOFA or other awards as they may become available. Such action will be for promoting and development of safe, decent and affordable housing for eligible families. <b>MHA intends to apply for funding in 2025 to permit the use of 25 project based vouchers in North-Northwest McAllen area.</b> The Housing Authority will continue to review Project Based Voucher options for its Public Housing Developments as per any new or existing Federal program may permit. (i.e. Rental Demonstration Program (RAD), Public Housing Conversion)</p> |
| 8.0 | <p><b>Capital Improvements.</b> Please complete Parts 8.1 through 8.3, as applicable.</p>   |
| 8.1 | <p><b>Capital Fund Program Annual Statement/Performance and Evaluation Report.</b> As part of the PHA 5-Year and Annual Plan, annually complete and submit the <i>Capital Fund Program Annual Statement/Performance and Evaluation Report</i>, form HUD-50075.1, for each current and open CFP grant and CFFP financing. <b>Please 50075.1, 50075.2 &amp; P&amp;E Reports attached.</b></p> <ul style="list-style-type: none"> <li>• Performance and Evaluation Report as of 12/31/2023 for TX59P02850122</li> <li>• Performance and Evaluation Report as of 12/31/2023 for TX59P02850123</li> </ul>  |
| 8.2 | <p><b>Capital Fund Program Five-Year Action Plan.</b> As part of the submission of the Annual Plan, PHAs must complete and submit the <i>Capital Fund Program Five-Year Action Plan</i>, form HUD-50075.2, and subsequent annual updates (on a rolling basis, e.g., drop current year, and add latest year for a five-year period). Large capital items must be included in the Five-Year Action Plan.</p>  |

|            |  |
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| <p>8.3</p> | <p><b>Capital Fund Financing Program (CFFP).</b></p> <p><input type="checkbox"/> Check if the PHA proposes to use any portion of its Capital Fund Program (CFP)/Replacement Housing Factor (RHF) to repay debt incurred to finance capital improvements.</p> <p>The Capital Fund Financing Program (CFFP) is being considered in anticipation of financing improvements for the following activities:</p> <ul style="list-style-type: none"> <li>• Renovation and/or new construction improvements for the Administration Building of the McAllen Housing Authority</li> <li>• The use of this funding on property acquisition and/or public donated land for new construction of a new development to replace public housing units previously demolished for prior mixed finance developments.</li> <li>• The use of this funding to acquire existing multi-family apartment complexes to replace public housing units previously demolished for prior mixed finance developments.</li> </ul>   |
| <p>9.0</p> | <p><b>Housing Needs. Based on information provided by the applicable Consolidated Plan, information provided by HUD, and other generally available data, make a reasonable effort to identify the housing needs of the low-income, very low-income, and extremely low-income families who reside in the jurisdiction served by the PHA, including elderly families, families with disabilities, and households of various races and ethnic groups, and other families who are on the public housing and Section 8 tenant-based assistance waiting lists. The identification of housing needs must address issues of affordability, supply, quality, accessibility, size of units, and location.</b></p> <p>City of McAllen Community Development Block Grant Action Plan FY 2023-2024</p> <p>Highlights identifying obstacles to meeting underserved families:</p> <ul style="list-style-type: none"> <li>• McAllen is located in one of the fastest growing regions in the country, and its population threatens to outstrip the existing capacity of local housing and community development organizations. With ongoing cutbacks to public services, individuals and families will be hard pressed to meet their needs for affordable housing and other community development assistance.</li> <li>• McAllen percentage of households living in poverty was 20.97%; higher than average unemployment at 4.3%</li> <li>• Housing market analysis: the median gross rent has risen 47.7% from \$541 (2017) to \$799 (2021) during the same period. This drastic inflation of the rental market indicates a growing barrier to affordable housing for renters in McAllen and throughout Hidalgo County.</li> <li>• Much of the region continues to struggle with high unemployment. The February 21, 2024 data for non-seasonal adjusted unemployment rate for the McAllen-Edinburg-Mission MSA was 7.0% (Bureau of Labor Statistics)</li> <li>• A major contributor to the region’s high unemployment and poverty rates is its low educational attainment levels. According to the 2018-2022 Census assessment, 78.7 percent of residents of McAllen have at least a high school diploma, compared to 85.2 % statewide. However, the percent of McAllen’s residents who have a bachelor’s degree or higher are comparable with the state level, 31.8% and 32.3% respectively.</li> </ul> <p>In order to overcome the identified obstacles, the City of McAllen has designated social services, housing and infrastructure, public facilities and economic developments activities as “High” priorities. As such HUD-awarded funds will be utilized to further these types of activities for the benefit of low-and moderate income persons.</p> |

### Housing Needs of Families on the Waiting List

Waiting list type: (select one)

- Section 8 tenant-based assistance
- Public Housing
- Combined Section 8 and Public Housing
- Public Housing Site-Based or sub-jurisdictional waiting list (optional)

If used, identify which development/sub jurisdiction:

| AS 01/31/2024                           | # of families | % of total families | Annual Turnover |
|---|---------------|---------------------|-----------------|
| Waiting list total                      | 878           |                     | 120             |
| Extremely low income<br><=30% AMI       | 732           | 83%                 |                 |
| Very low income<br>(>30% but <=50% AMI) | 99            | 11%                 |                 |
| Low income<br>(>50% but <80% AMI)       | 37            | 4%                  |                 |
| Families with children                  | 558           | 64%                 |                 |
| Elderly families                        | 159           | 18%                 |                 |
| Families with<br>Disabilities           | 191           | 22%                 |                 |
| White                                   | 616           | 70%                 |                 |
| Black/African American                  | 77            | 9%                  |                 |
| Hispanic                                | 725           | 83%                 |                 |
| Other or Declined to<br>Report          | 185           | 21%                 |                 |

| Characteristics by<br>Bedroom Size (Public<br>Housing Only) | Section 8 WL |  |  |
|---|--------------|--|--|
| 1BR   | N/A          |  |  |
| 2 BR  | N/A          |  |  |
| 3 BR  | N/A          |  |  |
| 4 BR  | N/A          |  |  |
| 5 BR  | N/A          |  |  |
| 5+ BR   | N/A          |  |  |

Is the waiting list closed (select one)  No  Yes  
 If yes: Section 8 HCV only  
**HOW LONG HAS IT BEEN CLOSED (# OF MONTHS)? 6 MONTHS**  
 Does the PHA expect to reopen the list in the PHA Plan year?  No  Yes  
 Does the PHA permit specific categories of families onto the waiting list, even if generally closed?  
 No  Yes

9.0



### Housing Needs of Families on the Waiting List

Waiting list type: (select one)

- Section 8 tenant-based assistance  
 Public Housing  
 Combined Section 8 and Public Housing  
 Public Housing Site-Based or sub-jurisdictional waiting list (optional)  
 If used, identify which development/sub jurisdiction:

| As of 01/31/2024                        | # of families | % of total families | Annual Turnover |
|---|---------------|---------------------|-----------------|
| Waiting list total                      | 214           |                     | 50              |
| Extremely low income<br><=30% AMI       | 132           | 62%                 |                 |
| Very low income<br>(>30% but <=50% AMI) | 55            | 26%                 |                 |
| Low income<br>(>50% but <80% AMI)       | 25            | 12%                 |                 |
| Families with children                  | 121           | 57%                 |                 |
| Elderly families                        | 66            | 31%                 |                 |
| Families with<br>Disabilities           | 53            | 25%                 |                 |
| White                                   | 210           | 81%                 |                 |
| Black/ African<br>American              | 2             | .93%                |                 |
| Hispanic                                | 210           | 98%                 |                 |
| Other or Declined to<br>Report          | 2             | .93%                |                 |

| Characteristics by<br>Bedroom Size (Public<br>Housing Only) | Public Housing WL |  |  |
|---|-------------------|--|--|
| 1BR   | 99                |  |  |
| 2 BR  | 56                |  |  |
| 3 BR  | 58                |  |  |
| 4 BR  | 1                 |  |  |
| 5 BR  | 0                 |  |  |
| 5+ BR   | 0                 |  |  |

Is the waiting list closed (select one)  No  Yes  
 If yes: Section 8 HCV only  
**HOW LONG HAS IT BEEN CLOSED (# OF MONTHS)?**  
 Does the PHA expect to reopen the list in the PHA Plan year?  No  Yes  
 Does the PHA permit specific categories of families onto the waiting list, even if generally closed?  
 No  Yes

9.0

|             |  |
|-------------|--|
| <p>9.1</p>  | <p><b>Strategy for Addressing Housing Needs. Provide a brief description of the PHA’s strategy for addressing the housing needs of families in the jurisdiction and on the waiting list in the upcoming year.</b></p> <p>The McAllen Housing Authority will continue to work with partners such as the City of McAllen, McAllen CDBG, City Police Dept., City Fire Dept., McAllen School District, local business, media, developers and partners to expand the housing needs of extremely, low and moderate income families. Gaining community support for our programs through education and outreach will be key to expanding the services we provide.</p>  |
| <p>10.0</p> | <p><b>Additional Information.</b> Describe the following, as well as any additional information HUD has requested.</p> <p>(a) Progress in Meeting Mission and Goals. Provide a brief statement of the PHA’s progress in meeting the mission and goals described in the 5-Year Plan.</p> <p>5-Year Plan (2020-2024) Mission and Goals Accomplishments</p> <ul style="list-style-type: none"> <li>• Continue to manage 49 unit multi-family development RAD PBV property known as Vine Terrace;</li> <li>• Continue to support 89 public housing units in two LIHTC developments with operating subsidy;</li> <li>• Continue to administer the Voucher Program allocation of 1,359 vouchers which includes 21 VASH and 5 Stability vouchers;</li> <li>• Successful administration and high utilization of the Emergency Housing Voucher program (54 vouchers)</li> <li>• Continue to administer the Voucher Homeownership Program; 55 families assisted with this program</li> <li>• Continue management arrangements with McAllen Housing Facility Corporation to manage 106-unit elderly developments known as Sunset Gardens and Villas at Beaumont;</li> <li>• Continue management arrangements with McAllen Housing Facility Corporation to manage 78-unit family development known as Orchid Place Apartments.</li> <li>• Continue management arrangements with McAllen Housing Development Corporation to manage 20-unit multi-family development known as Hibiscus Apartments.</li> <li>• Continue to administer in a fiscally responsible and prudent manner, with no audit findings, the Public Housing, Housing Choice Voucher and Capital Fund Program;</li> <li>• Continue to fulfill the reporting program requirements as directed by HUD for PHAS, SEMAP, FASS, VMS, etc.</li> <li>• Continue efforts of land acquisition activity for replacement of demolished public housing units or to build new units; including acquisition of existing multi-family developments to increase housing inventory</li> <li>• Continue to explore funding venues including CFFP, LIHTC, Bond Issues, RHF, Operating Subsidy and regular financing to construct 61 new public housing units to replace previously demolished units not in inventory</li> <li>• Added 1 multi-family LIHTC development to portfolio and will continue to explore options for similar developments.</li> <li>• Achieved the Connect Home designation for the PHA.</li> <li>• Enrollment of new members/community stakeholders within the FSS PCC Committee.</li> <li>• Increased community and local stakeholder engagement to enhance services and educational scholarship opportunities to low-income families</li> </ul> <p>(b) Significant Amendment and Substantial Deviation/Modification. Provide the PHA’s definition of “significant amendment” and “substantial deviation/modification”</p> <p>Significant Amendment:</p> <ul style="list-style-type: none"> <li>▪ Any increase or decrease over 50% in the funds projected in the Financial Resource Statement and/or the Capital Fund Program Annual Statement;</li> <li>▪ Any change being submitted to HUD that requires a separate notification to residents, such as changes in the Hope VI, Public Housing Conversion, Demolition/Disposition, Designated Housing or Public Housing Homeownership programs; and</li> <li>▪ Any change in policy or operation that is inconsistent with the applicable Consolidated Plan.</li> </ul> <p>Substantial Deviation/Modification</p> <ul style="list-style-type: none"> <li>▪ Any change to the Mission Statement;</li> <li>▪ 50% deletion from or addition to the goals and objectives as a whole; and</li> <li>▪ 50% or more decrease in the quantifiable measurement of any individual goal or objective.</li> </ul> |

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| 11.0 | <p><b>Required Submission for HUD Field Office Review.</b> In addition to the PHA Plan template (HUD-50075), PHAs must submit the following documents. Items (a) through (g) may be submitted with signature by mail or electronically with scanned signatures, but electronic submission is encouraged. Items (h) through (i) must be attached electronically with the PHA Plan. <b>Note:</b> Faxed copies of these documents will not be accepted by the Field Office.</p> <ul style="list-style-type: none"> <li>(a) Form HUD-50077, <i>PHA Certifications of Compliance with the PHA Plans and Related Regulations</i> (which includes all certifications relating to Civil Rights)</li> <li>(b) Form HUD-50070, <i>Certification for a Drug-Free Workplace</i> (PHAs receiving CFP grants only)</li> <li>(c) Form HUD-50071, <i>Certification of Payments to Influence Federal Transactions</i> (PHAs receiving CFP grants only)</li> <li>(d) Form SF-LLL, <i>Disclosure of Lobbying Activities</i> (PHAs receiving CFP grants only)</li> <li>(e) Form SF-LLL-A, <i>Disclosure of Lobbying Activities Continuation Sheet</i> (PHAs receiving CFP grants only)</li> <li>(f) Resident Advisory Board (RAB) comments. Comments received from the RAB must be submitted by the PHA as an attachment to the PHA Plan. PHAs must also include a narrative describing their analysis of the recommendations and the decisions made on these recommendations.</li> <li>(g) Challenged Elements</li> <li>(h) Form HUD-50075.1, <i>Capital Fund Program Annual Statement/Performance and Evaluation Report</i> (PHAs receiving CFP grants only)</li> <li>(i) Form HUD-50075.2, <i>Capital Fund Program Five-Year Action Plan</i> (PHAs receiving CFP grants only)</li> </ul> |
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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 5-Year and Annual PHA Plans. 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, and informs HUD, families served by the PHA, and members of the public of the PHA's mission and strategies for serving the needs of low-income and very low-income families. This form is to be used by all PHA types for submission of the 5-Year and Annual Plans to HUD. Public reporting burden for this information collection is estimated to average 12.68 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 there under 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

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

U.S. Department of Housing and Urban Development  
 Office of Public and Indian Housing  
 OMB No. 2577-0157  
 Expires 11/30/2023

“Public reporting burden for this collection of information is estimated to average 2.2 hours. This includes the time for collecting, reviewing, and reporting the data. The information requested is required to obtain a benefit. This form is used to verify allowable and reasonableness of grant expenses. There are no assurances of confidentiality. HUD may not conduct or sponsor, and an applicant is not required to respond to a collection of information unless it displays a currently valid OMB control number.

|   |   |  |
|---|---|--|
| PHA Name<br><b>Housing Authority of the City of McAllen</b> | Grant Type and Number <b>TX59P02850122</b><br>Capital Fund Program Grant No:<br>Replacement Housing Factor Grant No:<br>Date of CFFP: | FFY of Grant:<br>FFY of Grant Approval:<br><b>2022</b> |
|---|---|--|

- Type of Grant
- Original Annual Statement    
  Reserve for Disasters/Emergencies    
  Revised Annual Statement (revision no:
- Performance and Evaluation Report for Period Ending:    
  Final Performance and Evaluation Report

| Line | Summary by Development Account                               | Total Estimated Cost |                      | Total Actual Cost <sup>1</sup> |           |
|------|--|----------------------|----------------------|--------------------------------|-----------|
|      |  | Original             | Revised <sup>2</sup> | Obligated                      | Expended  |
| 1    | Total non-CFP Funds  |                      |                      |                                |           |
| 2    | 1406 Operations (may not exceed 20% of line 15) <sup>3</sup> | 98,675.10            |                      | 98,675.10                      | 98,675.10 |
| 3    | 1408 Management Improvements                                 |                      |                      |                                |           |
| 4    | 1410 Administration (may not exceed 10% of line 15)          | 19,555.90            |                      | 19,555.90                      | 19,555.90 |
| 5    | 1480 General Capital Activity                                | 78,000.00            |                      | 78,000.00                      | 0.00      |
| 6    | 1492 Moving to Work Demonstration                            |                      |                      |                                |           |
| 7    | 1501 Collateralization Expense / Debt Service Paid by PHA    |                      |                      |                                |           |
| 8    | 1503 RAD-CFP   |                      |                      |                                |           |
| 9    | 1504 RAD Investment Activity                                 |                      |                      |                                |           |
| 10   | 1505 RAD-CPT   |                      |                      |                                |           |
| 11   | 9000 Debt Reserves   |                      |                      |                                |           |
| 12   | 9001 Bond Debt Obligation paid Via System of Direct Payment  |                      |                      |                                |           |
| 13   | 9002 Loan Debt Obligation paid Via System of Direct Payment  |                      |                      |                                |           |
| 14   | 9900 Post Audit Adjustment                                   |                      |                      |                                |           |
|      |  |                      |                      |                                |           |
|      |  |                      |                      |                                |           |
|      |  |                      |                      |                                |           |

<sup>1</sup> To be completed for the Performance and Evaluation Report.  
<sup>2</sup> To be completed for the Performance and Evaluation Report or a Revised Annual Statement.  
<sup>3</sup> PHAs with under 250 units in management may use 100% of CFP Grants for operations.

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

U.S. Department of Housing and Urban Development  
 Office of Public and Indian Housing  
 OMB No. 2577-0157  
 Expires 11/30/2023

| <b>Part I: Summary</b>   |  |  |                      |  |            |
|--|--|--|----------------------|--|------------|
| PHA Name:<br><b>Housing Authority<br/>of the City of<br/>McAllen</b>                     |  | Grant Type and Number<br>Capital Fund Program Grant No:<br>Replacement Housing Factor Grant No:<br>Date of CFFP: |                      | FFY of Grant:<br>FFY of Grant Approval:<br><b>2022</b>           |            |
|  |  | <b>TX59P02850122</b>   |                      |  |            |
| Type of Grant  |  |  |                      |  |            |
| <input type="checkbox"/> Original Annual Statement                                       |  | <input type="checkbox"/> Reserve for Disasters/Emergencies   |                      | <input type="checkbox"/> Revised Annual Statement (revision no:  |            |
| <input checked="" type="checkbox"/> Performance and Evaluation Report for Period Ending: |  |  |                      | <input type="checkbox"/> Final Performance and Evaluation Report |            |
| Line   | Summary by Development Account   | Total Estimated Cost   |                      | Total Actual Cost <sup>1</sup>                                   |            |
|  |  | Original   | Revised <sup>2</sup> | Obligated  | Expended   |
| 15   | Amount of Annual Grant:: (sum of lines 2 - 14)                             | 196,231.00   |                      | 196,231.00   | 118,231.00 |
| 16   | Amount of line 15 Related to LBP Activities                                |  |                      |  |            |
| 17   | Amount of line 15 Related Sect. 504, ADA, and Fair Housing Act Activities. |  |                      |  |            |
| 18   | Amount of line 15 Related to Security - Soft Costs                         |  |                      |  |            |
| 19   | Amount of line 15 Related to Security - Hard Costs                         |  |                      |  |            |
| 20   | Amount of line 15 Related to Energy Conservation Measures                  |  |                      |  |            |
| Signature of Executive Director *  |  | Date   |                      | Signature of Public Housing Director                             |            |
|  |  |  |                      | Date   |            |

\* I certify that the information provided on this form and in any accompanying documentation is true and accurate. I acknowledge that making, presenting, or submitting a false, fictitious, or fraudulent statement, representation, or certification may result in criminal, civil, and/or administrative sanctions, including fines, penalties, and imprisonment.

<sup>1</sup> To be completed for the Performance and Evaluation Report.

<sup>2</sup> To be completed for the Performance and Evaluation Report or a Revised Annual Statement.

<sup>3</sup> PHAs with under 250 units in management may use 100% of CFP Grants for operations.

| Part II: Supporting Pages                                    |   |                            |   |                      |                      |                                      |                                |                |
|--|---|----------------------------|---|----------------------|----------------------|--------------------------------------|--------------------------------|----------------|
| PHA Name:<br><b>Housing Authority of The City of McAllen</b> |   |                            | Grant Type and Number<br>Capital Fund Program Grant<br>No: CFFP (Yes/ No):<br>Replacement Housing<br>Factor Grant No:<br><b>TX59P02850122</b><br><br><b>-</b> |                      |                      | Federal FFY of Grant:<br><b>2022</b> |                                |                |
| Development Number<br>Name/PHA-Wide<br>Activities            | General Description of Major Work<br>Categories | Development<br>Account No. | Quantity  | Total Estimated Cost |                      | Total Actual Cost                    |                                | Status of Work |
|  |   |                            |   | Original             | Revised <sup>1</sup> | Funds<br>Obligated <sup>2</sup>      | Funds<br>Expended <sup>2</sup> |                |
| TX028 Agency-Wide  | Operations                                      | 1406                       |   | 98,675.10            |                      | 98,675.10                            | 98,675.10                      | Complete       |
| TX028 Agency-Wide  | Administration                                  | 1410                       |   | 19,555.90            |                      | 19,555.90                            | 19,555.90                      | Complete       |
| TX028 Agency-Wide  | General Capital Activity                        | 1480                       |   | 78,000.00            |                      | 78,000.00                            |                                | In progress    |
|  |   |                            |   |                      |                      |                                      |                                |                |
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<sup>1</sup> To be completed for the Performance and Evaluation Report or a Revised Annual Statement.

<sup>2</sup> To be completed for the Performance and Evaluation Report.



| Part III: Implementation Schedule for Capital Fund Financing Program |   |                               |   |                                |   |
|--|---|-------------------------------|---|--------------------------------|---|
| PHA Name: <b>Housing Authority of The City of McAllen</b>            |   |                               |   |                                | Federal FFY of Grant:<br><b>2022</b>          |
| Development Number<br>Name/PHA-Wide<br>Activities                    | All Fund Obligated<br>(Quarter Ending Date) |                               | All Funds Expended<br>(Quarter Ending Date) |                                | Reasons for Revised Target Dates <sup>1</sup> |
|  | Original<br>Obligation End<br>Date          | Actual Obligation<br>End Date | Original Expenditure<br>End Date            | Actual Expenditure End<br>Date |   |
| TX028  | 05-11-2024                                  | 09-30-2023                    | 05-11-2026                                  |                                |   |
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<sup>1</sup> Obligation and expenditure end dated can only be revised with HUD approval pursuant to Section 9j of the U.S. Housing Act of 1937, as amended.



| Part III: Implementation Schedule for Capital Fund Financing Program |   |                               |   |                                |   |
|--|---|-------------------------------|---|--------------------------------|---|
| PHA Name:  |   |                               |   |                                | Federal FFY of Grant:                         |
| Development Number<br>Name/PHA-Wide<br>Activities                    | All Fund Obligated<br>(Quarter Ending Date) |                               | All Funds Expended<br>(Quarter Ending Date) |                                | Reasons for Revised Target Dates <sup>1</sup> |
|  | Original<br>Obligation End<br>Date          | Actual Obligation<br>End Date | Original Expenditure<br>End Date            | Actual Expenditure End<br>Date |   |
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<sup>1</sup> Obligation and expenditure end dated can only be revised with HUD approval pursuant to Section 9j of the U.S. Housing Act of 1937, as amended.

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

U.S. Department of Housing and Urban Development  
 Office of Public and Indian Housing  
 OMB No. 2577-0157  
 Expires 11/30/2023

“Public reporting burden for this collection of information is estimated to average 2.2 hours. This includes the time for collecting, reviewing, and reporting the data. The information requested is required to obtain a benefit. This form is used to verify allowable and reasonableness of grant expenses. There are no assurances of confidentiality. HUD may not conduct or sponsor, and an applicant is not required to respond to a collection of information unless it displays a currently valid OMB control number.

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|---|---|--|
| PHA Name<br><b>Housing Authority of the City of McAllen</b> | Grant Type and Number <b>TX59P02850123</b><br>Capital Fund Program Grant No:<br>Replacement Housing Factor Grant No:<br>Date of CFFP: | FFY of Grant:<br>FFY of Grant Approval:<br><b>2023</b> |
|---|---|--|

- Type of Grant
- Original Annual Statement    
  Reserve for Disasters/Emergencies    
  Revised Annual Statement (revision no:
- Performance and Evaluation Report for Period Ending:    
  Final Performance and Evaluation Report

| Line | Summary by Development Account                               | Total Estimated Cost |                      | Total Actual Cost <sup>1</sup> |           |
|------|--|----------------------|----------------------|--------------------------------|-----------|
|      |  | Original             | Revised <sup>2</sup> | Obligated                      | Expended  |
| 1    | Total non-CFP Funds  |                      |                      |                                |           |
| 2    | 1406 Operations (may not exceed 20% of line 15) <sup>3</sup> | 39,616.00            |                      | 39,616.00                      | 39,616.00 |
| 3    | 1408 Management Improvements                                 |                      |                      |                                |           |
| 4    | 1410 Administration (may not exceed 10% of line 15)          | 19,475.90            |                      | 19,475.90                      | 19,475.90 |
| 5    | 1480 General Capital Activity                                | 136,283.10           |                      | 0.00                           | 0.00      |
| 6    | 1492 Moving to Work Demonstration                            |                      |                      |                                |           |
| 7    | 1501 Collateralization Expense / Debt Service Paid by PHA    |                      |                      |                                |           |
| 8    | 1503 RAD-CFP   |                      |                      |                                |           |
| 9    | 1504 RAD Investment Activity                                 |                      |                      |                                |           |
| 10   | 1505 RAD-CPT   |                      |                      |                                |           |
| 11   | 9000 Debt Reserves   |                      |                      |                                |           |
| 12   | 9001 Bond Debt Obligation paid Via System of Direct Payment  |                      |                      |                                |           |
| 13   | 9002 Loan Debt Obligation paid Via System of Direct Payment  |                      |                      |                                |           |
| 14   | 9900 Post Audit Adjustment                                   |                      |                      |                                |           |
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<sup>1</sup> To be completed for the Performance and Evaluation Report.  
<sup>2</sup> To be completed for the Performance and Evaluation Report or a Revised Annual Statement.  
<sup>3</sup> PHAs with under 250 units in management may use 100% of CFP Grants for operations.

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

U.S. Department of Housing and Urban Development  
 Office of Public and Indian Housing  
 OMB No. 2577-0157  
 Expires 11/30/2023

| <b>Part I: Summary</b>   |  |  |                      |  |           |
|--|--|--|----------------------|--|-----------|
| PHA Name:<br><b>Housing Authority<br/>of the City of<br/>McAllen</b>                     |  | Grant Type and Number<br>Capital Fund Program Grant No:<br>Replacement Housing Factor Grant No:<br>Date of CFFP: |                      | FFY of Grant:<br>FFY of Grant Approval:<br><b>2023</b>           |           |
|  |  | <b>TX59P02850123</b>   |                      |  |           |
| Type of Grant  |  |  |                      |  |           |
| <input type="checkbox"/> Original Annual Statement                                       |  | <input type="checkbox"/> Reserve for Disasters/Emergencies   |                      | <input type="checkbox"/> Revised Annual Statement (revision no:  |           |
| <input checked="" type="checkbox"/> Performance and Evaluation Report for Period Ending: |  |  |                      | <input type="checkbox"/> Final Performance and Evaluation Report |           |
| Line   | Summary by Development Account   | Total Estimated Cost   |                      | Total Actual Cost <sup>1</sup>                                   |           |
|  |  | Original   | Revised <sup>2</sup> | Obligated  | Expended  |
| 15   | Amount of Annual Grant:: (sum of lines 2 - 14)                             | 195,375.00   |                      | 59,091.90  | 59,091.90 |
| 16   | Amount of line 15 Related to LBP Activities                                |  |                      |  |           |
| 17   | Amount of line 15 Related Sect. 504, ADA, and Fair Housing Act Activities. |  |                      |  |           |
| 18   | Amount of line 15 Related to Security - Soft Costs                         |  |                      |  |           |
| 19   | Amount of line 15 Related to Security - Hard Costs                         |  |                      |  |           |
| 20   | Amount of line 15 Related to Energy Conservation Measures                  |  |                      |  |           |
| Signature of Executive Director *  |  | Date   |                      | Signature of Public Housing Director                             |           |
|  |  |  |                      | Date   |           |

\* I certify that the information provided on this form and in any accompanying documentation is true and accurate. I acknowledge that making, presenting, or submitting a false, fictitious, or fraudulent statement, representation, or certification may result in criminal, civil, and/or administrative sanctions, including fines, penalties, and imprisonment.

<sup>1</sup> To be completed for the Performance and Evaluation Report.

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<sup>3</sup> PHAs with under 250 units in management may use 100% of CFP Grants for operations.

| Part II: Supporting Pages                                    |   |                            |   |                      |                      |   |                                |                |                                      |  |  |
|--|---|----------------------------|---|----------------------|----------------------|---|--------------------------------|----------------|--------------------------------------|--|--|
| PHA Name:<br><b>Housing Authority of The City of McAllen</b> |   |                            | Grant Type and Number<br>Capital Fund Program Grant<br>No: CFFP (Yes/ No):<br>Replacement Housing<br>Factor Grant No: |                      |                      | TX59P02850123<br><br><br><br><br><br><b>-</b> |                                |                | Federal FFY of Grant:<br><b>2023</b> |  |  |
| Development Number<br>Name/PHA-Wide<br>Activities            | General Description of Major Work<br>Categories | Development<br>Account No. | Quantity  | Total Estimated Cost |                      | Total Actual Cost                             |                                | Status of Work |                                      |  |  |
|  |   |                            |   | Original             | Revised <sup>1</sup> | Funds<br>Obligated <sup>2</sup>               | Funds<br>Expended <sup>2</sup> |                |                                      |  |  |
| TX028 Agency-Wide  | Operations                                      | 1406                       |   | 39,616.00            |                      | 39,616.00                                     | 39,616.00                      | Complete       |                                      |  |  |
| TX028 Agency-Wide  | Administration                                  | 1410                       |   | 19,475.90            |                      | 19,475.90                                     | 19,475.90                      | Complete       |                                      |  |  |
| TX028 Agency-Wide  | General Capital Activity                        | 1480                       |   | 136,283.10           |                      | 0.00  | 0.00                           | In progress    |                                      |  |  |
|  |   |                            |   |                      |                      |   |                                |                |                                      |  |  |
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<sup>1</sup> To be completed for the Performance and Evaluation Report or a Revised Annual Statement.  
<sup>2</sup> To be completed for the Performance and Evaluation Report.

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

U.S. Department of Housing and Urban Development  
 Office of Public and Indian Housing  
 OMB No. 2577-0157  
 Expires 11/30/2023

| Part II: Supporting Pages                         |   |  |          |                      |                      |                                 |                                |                |
|---|---|--|----------|----------------------|----------------------|---------------------------------|--------------------------------|----------------|
| PHA Name:   |   | Grant Type and Number<br>Capital Fund Program Grant <b>TX59P02850123</b><br>No: CFFP (Yes/ No):<br>Replacement Housing<br>Factor Grant No: |          |                      |                      | Federal FFY of Grant:           |                                |                |
| Development Number<br>Name/PHA-Wide<br>Activities | General Description of Major Work<br>Categories | Development<br>Account No.   | Quantity | Total Estimated Cost |                      | Total Actual Cost               |                                | Status of Work |
|   |   |  |          | Original             | Revised <sup>1</sup> | Funds<br>Obligated <sup>2</sup> | Funds<br>Expended <sup>2</sup> |                |
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<sup>1</sup> To be completed for the Performance and Evaluation Report or a Revised Annual Statement.  
<sup>2</sup> To be completed for the Performance and Evaluation Report.

| Part III: Implementation Schedule for Capital Fund Financing Program |   |                               |   |                                |   |
|--|---|-------------------------------|---|--------------------------------|---|
| PHA Name: <b>Housing Authority of The City of McAllen</b>            |   |                               |   |                                | Federal FFY of Grant:<br><b>2023</b>          |
| Development Number<br>Name/PHA-Wide<br>Activities                    | All Fund Obligated<br>(Quarter Ending Date) |                               | All Funds Expended<br>(Quarter Ending Date) |                                | Reasons for Revised Target Dates <sup>1</sup> |
|  | Original<br>Obligation End<br>Date          | Actual Obligation<br>End Date | Original Expenditure<br>End Date            | Actual Expenditure End<br>Date |   |
| TX028  | 02-16-2025                                  |                               | 02-16-2027                                  |                                |   |
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<sup>1</sup> Obligation and expenditure end dated can only be revised with HUD approval pursuant to Section 9j of the U.S. Housing Act of 1937, as amended.

| Part III: Implementation Schedule for Capital Fund Financing Program |   |                               |   |                                |   |
|--|---|-------------------------------|---|--------------------------------|---|
| PHA Name:  |   |                               |   |                                | Federal FFY of Grant:                         |
| Development Number<br>Name/PHA-Wide<br>Activities                    | All Fund Obligated<br>(Quarter Ending Date) |                               | All Funds Expended<br>(Quarter Ending Date) |                                | Reasons for Revised Target Dates <sup>1</sup> |
|  | Original<br>Obligation End<br>Date          | Actual Obligation<br>End Date | Original Expenditure<br>End Date            | Actual Expenditure End<br>Date |   |
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<sup>1</sup> Obligation and expenditure end dated can only be revised with HUD approval pursuant to Section 9j of the U.S. Housing Act of 1937, as amended.