

Priorities at Your PHA

This worksheet is meant to help you get to know your agency. You may complete it by yourself, or as a group with other board members. If you complete it as a group, you may want to also include your Executive Director or other executive staff to help you complete this activity. You may complete this while you work through the “Know your PHA” section or after you complete the entire *Lead the Way* curriculum.

You can save this worksheet, update it, and print it for your ongoing reference. You may consider revising it annually to help you stay up to date on your programming.

Introduction: Get to know the Priorities at Your PHA

It is important to understand the status of all the programs within your PHA. Complete the following to get to know your programs better.

Low Rent Public Housing

How is it financed (through what mechanism)?

What is the obligation and expenditure timeline of the funding agreement and when does it expire? (You may need to complete by project.)

What is the largest funding stream for this housing?

Which funding stream is the first to expire?

Do you have plans to cover this funding source when it ends?

Section 8 Housing Choice Voucher Program

How is it financed (through what mechanism)?

What is the duration of the funding agreement and when does it expire? (You may need to complete by project.)

What is the largest funding stream for this program?

Which funding stream is the first to expire?

Do you have plans to cover this funding source when it ends?

Resident Services Programs

How is it financed (through what mechanism)?

What is the duration of the funding agreement and when does it expire? (You may need to complete by project.)

What is the largest funding stream for these programs?

Which funding stream is the first to expire?

Do you have plans to cover this funding source when it ends?

Mixed Finance and Choice Neighborhoods

How is it financed (through what mechanism)?

What is the duration of the funding agreement and when does it expire? (You may need to complete by project.)

What is the largest funding stream for these programs?

Which funding stream is the first to expire?

Do you have plans to cover this funding source when it ends?

Part 1: Asset Management

The first step in providing oversight to your AMPs is to know the property type and number of units for each AMP. Complete the table below to have full inventory of your AMPs.¹

AMP #	Name	# of Units	Overall Budget/Operating subsidy
			\$
			\$
			\$
			\$
			\$
			\$
			\$
			\$
			\$
			\$
			\$

Your PHA has AMPS and low rent public housing units.

¹ You can request this information from the local field office financial analyst. This would be in the OpSub processing, remember to adjust for the funding pro-ration.

Part 2: Program Performance

Every board member should know his or her program performance scores. These scores are provided for your PHA through the Public Housing Assessment System (PHAS) and for your Housing Choice Voucher program, if you have that program, through the Section Eight Management Assessment Program (SEMAP). Complete the fields below to better know your scores.

Public Housing Assessment System (PHAS)

Indicator	Possible points	Your Score
Physical (PASS)	40	
Financial (FASS)	25	
Management Operations (MASS)	25	
Capital Fund Program (CFP)	10	

Your overall PHAS score is:

Are you a high, standard, sub-standard, or troubled performer?

Section Eight Management Assessment Program (SEMAP)

Indicator	Possible points	Your Score
Selection from the Waiting List	15	
Reasonable Rent	20	
Determination of Adjusted Income	20	
Utility Allowance Schedule	5	
HQS Quality Control Inspections	5	
HQS Enforcement	10	
Expanding Housing Opportunities	5	
Payment Standards	5	
Annual Reexaminations	10	
Correct Tenant Rent Calculations	5	
Pre-Contract HQS Inspections	5	

Indicator	Possible points	Your Score
Annual HQS Inspections	10	
Lease-Up	20	
Family Self-Sufficiency (FSS) Enrollment and Escrow Accounts	10	
De-concentration Bonus	5	

Your overall PHAS score is:

Are you a high, standard, sub-standard, or troubled performer?

What are your trouble areas? What are some ways the PHA can improve its performance?

Part 3: Budgets

As a board member, you will be provided with budget information at each of your monthly board meetings. This information should inform your job of financial management and oversight. Use the worksheet below to understand your agency's budget and trends over time.

Income (per Unit/per Month, or PUM)

Estimated Operating Receipts	Actual PUM Last Fiscal Year	Actual PUM Current Fiscal Year	Budgeted PUM
HUD Subsidy Earned	\$	\$	\$
Rental Income	\$	\$	\$
Other Income	\$	\$	\$
Total PUM Income	\$	\$	\$

Expenses (per Unit/per Month, or PUM)

Description of Estimated Operating Expense	Actual PUM Last Fiscal Year	Actual PUM Current Fiscal Year	Budgeted PUM
Administration	\$	\$	\$
Resident Services	\$	\$	\$
Utilities	\$	\$	\$
Maintenance (Contract & Staff)	\$	\$	\$
Protective Services	\$	\$	\$
Bookkeeping & Audit	\$	\$	\$
Non-routine Expenses	\$	\$	\$
Total PUM Expense	\$	\$	\$

Income/Expense Comparison (per Unit/per Month, or PUM)

Description	Actual PUM Last Fiscal Year	Actual PUM Current Fiscal Year	Budgeted PUM
Totals			
Operating Income	\$	\$	\$
Operating Expense	\$	\$	\$
Profit (or Loss) PUM	\$	\$	\$

PHA Funding Streams—Trends over Time

Your low rent housing, or AMPs, are funded through the HUD Operating Subsidy and HUD Capital Funding. The operating subsidy for your PHA is totaled for the individual AMPs. Complete the fields below with you PHA's operating budget from the past four years:

Timeframe	Year (e.g. 2014)	Operating budget
Previous year		\$
2 years ago		\$
3 years ago		\$
4 years ago		\$

Capital Fund grants are awarded to your PHA. Complete the fields below with you PHA's capital funds from the past 4 years:

Timeframe	Year (e.g. 2014)	Capital funds
Previous year		\$
2 years ago		\$
3 years ago		\$
4 years ago		\$

Other funding streams are included below. Track how they have trended over time.

Housing Choice Voucher Housing Assistance Payments

Timeframe	Year (e.g. 2014)	Operating budget
Previous year		\$
2 years ago		\$
3 years ago		\$
4 years ago		\$

Housing Choice Voucher Administrative Fees

Timeframe	Year (e.g. 2014)	Operating budget
Previous year		\$
2 years ago		\$
3 years ago		\$
4 years ago		\$

Resident Program Grants

Timeframe	Year (e.g. 2014)	Operating budget
Previous year		\$
2 years ago		\$
3 years ago		\$
4 years ago		\$

Development Grants

Timeframe	Year (e.g. 2014)	Operating budget
Previous year		\$
2 years ago		\$
3 years ago		\$
4 years ago		\$

Part 4: PHA Plan

Have you read all the relevant plans and bylaws of your PHA? Complete the checklist below by checking the boxes when you have located and reviewed the following resources.

Obtained	Read	Plans and Bylaws
		Annual Contributions Contract (ACC)
		Admissions & Continued Occupancy Policy (ACOP)
		Section 8 Housing Choice Voucher Administrative Plan
		PHA Plan—Annual
		PHA Plan—5-Year
		PHA Bylaws and Code of Ethics
		Capitalization policy
		Drug-free workplace policy
		Financial management and internal controls policy
		Investments policy
		Maintenance policy
		Personnel policy
		Procurement policy
		Property disposition policy
		Records retention policy
		Travel policy
		Vehicle policy
		Non-smoking housing policy

Reflection Questions

1. What have you learned by completing this worksheet?
2. What are you surprised by?
3. What questions do you still need to answer? How will you get your answers?