

IN THE BOARD OF COMMISSIONERS OF THE  
HOUSING AUTHORITY AND COMMUNITY SERVICES AGENCY  
OF LANE COUNTY, OREGON

ORDER NO.

97-9-24-2H  
**FILED**

SEP 3 01997

COUNTY CLERK

BY M. Baldwin

)IN THE MATTER OF APPROVING  
)POLICIES AND PROCEDURAL  
)CHANGES TO ASSURE HUD  
)COMPLIANCE TO PUBLIC HOUSING  
)MANAGEMENT ASSESSMENT  
)PROGRAM CHANGES.

WHEREAS, HUD requires that the Board adopt new procedures and policies to comply with changes to the Public Housing Management Assessment Program, and the Executive Director having so recommended, NOW, THEREFORE, IT IS HEREBY

ORDERED, that the Board designates the Section 3 and Family Self-Sufficiency Programs official Agency "economic up-lift programs", and it is further

ORDERED, that the Board recognizes the Public Housing Advisory Committee as an elected body of residents that give programmatic input on the operation of Public Housing, and that the Board encourages the formation of Resident Organizations, and it is further

ORDERED, that the Board adopts those policies and procedures in the attached DRAFT Statement of Policies that govern the screening criteria and lease enforcement regulations relating to HUD's "one strike and you're out" approach, and it is further

ORDERED, that the Board encourages staff and residents to report crimes to local law enforcement agencies, and directs the Agency to cooperate with local law enforcement agencies towards the development of methodologies for tracking and reporting crime.

DATED this 24th day of September, 1997

Cindy Weeldreyer  
Chairperson  
HACSA Board of Commissioners

IN THE MATTER OF APPROVING POLICIES AND PROCEDURAL CHANGES TO  
ASSURE HUD COMPLIANCE TO PUBLIC HOUSING MANAGEMENT ASSESSMENT  
PROGRAM CHANGES.

APPROVED AS TO FORM

Date: 9/15/97 in Lane county  
Jerome J. Hill  
COUNSEL

STATEMENT OF POLICIES

GOVERNING ADMISSION TO AND CONTINUED OCCUPANCY  
OF THE HUD FUNDED LOW-INCOME PUBLIC HOUSING  
ABBIE LANE, VILLAGE OAKS & FOURTEEN PINES DEVELOPMENTS

OPERATED BY THE  
HOUSING AUTHORITY AND COMMUNITY SERVICES AGENCY  
OF  
LANE COUNTY

Housing Authority and Community Services Agency  
of Lane County, Oregon  
177 Day Island Road  
Eugene, Oregon 97401

Public Housing Division  
300 West Fairview Drive  
Springfield, Oregon 97477

(Revised July 1997)  
(Excluding Grievance Procedures)

## INTRODUCTION

BOOK 159 PAGE 1292

The Public Housing program of HACSA is operated within the context of a Mission Statement:

Working as a team, we serve people with limited resources by providing decent, safe, and sanitary housing. We do so with a commitment to ownership, development, management, and fiscal integrity based upon the principle of partnership. This partnership is built on self-reliance, responsibility, meeting expectations, and being good neighbors.

We summarize the Mission with a slogan:

Teamwork leads to Partnership which makes Good Neighbors.

Language sends an important message about any program. Throughout our Statement of Policy language is used to maintain consistency with Oregon State Law and Federal Regulations. We believe, however, that the language which best represents our Mission defines tenants as RESIDENTS, and the landlord as HOUSING AUTHORITY or AGENCY and projects as COMPLEXES or DEVELOPMENTS.

This Statement of Policy has been developed consistent with Federal rules and regulations governing admission to and continued occupancy of units funded through the Department of Housing and Urban Development's Low Income Public Housing program and units operated under HUD handbook 4350.3, as operated by the Housing Authority and Community Services Agency of Lane County. It specifically applies to the following developments:

1. Laurelwood Homes (6-1), Florence - There are 30 units for elderly, disabled and family residents. Occupancy occurred in 1961. These homes are one-story duplex and detached units.
2. McKenzie Village (6-2,3), Springfield - There are 172 units for elderly, disabled and family residents. Occupancy occurred in 1961 for phase 1, and 1963 for phase 2. These homes are one-story duplexes.
3. Parkview Terrace (6-4), Eugene - There are 150 units for elderly and disabled residents. Occupancy occurred in 1966. These homes are in a two-court, four-story elevator building.
4. Lindeborg Place (6-5), Junction City - There are 40 units for elderly and disabled residents. Occupancy occurred in 1967. These homes are in a courtyard elevator building, two-stories in height with all units being one level.

5. Cresview Villa (6-6), Creswell - There are 14 units for elderly and disabled **residents**. Occupancy occurred in 1967. The homes are one-story row units.
6. Riverview Terrace (6-7), Cottage Grove - There are 60 units for elderly and disabled **residents**. Occupancy occurred in 1968. These homes are in a six-story elevator building.
7. Veneta Villa (6-9), Veneta - There are 50 units for elderly, disabled and family **residents**. Occupancy occurred in 1969. These homes are all one-story quads, six-plex, duplex and scattered site units.
8. Scattered Sites (6-15) in Eugene (16 units) and Springfield (10 units) totaling 26 units for families. These units are an average of 20 years old and were purchased and occupied in late 1980. These are all single family detached or duplex homes.
9. Pengra Court (6-16) in Springfield (22 units), and scattered site units in Eugene (9) totaling 31 units for families. Occupancy occurred in 1982. These homes are two-story row and duplex (scattered site) units.
10. Scattered Sites (6-17) in Eugene (18 units) and Springfield (9 units) totaling 27 units for families. These units are an average of 34 years old and were purchased and occupied in 1982. These are all single family detached or duplex homes.
11. Cresview Villa (6-18) in Creswell (20 units) for elderly and disabled **residents**. These units were added to previously built Cresview Villa. Occupancy occurred in 1983. These homes are one-story row units.
12. Scattered Sites (6-20) in Eugene (10 units) for families. These units are an average of 16 years old and were purchased and occupied in 1985. These are all single family detached or duplex homes.
13. Scattered Sites (6-023) in Eugene (40 units) for families. These units are an average of 20 years old and were purchased and occupied in 1987. These are all single detached or duplex homes.
14. Maple Wood Meadows (6-24) in Eugene (38 units) for family and disabled **residents**. Occupancy occurred in 1991. These are all one and two story duplex units.
15. Abbie Lane (AL) in Eugene (25 units) for families and disabled **residents**. Occupancy occurred in 1981. These are one and two story units, in four buildings, centered around three courtyard areas.

16. **Village Oaks (VO) in Eugene (67 units) for families and disabled residents. Occupancy occurred in 1996. These homes are in one and two-story buildings centered around a number of court yard areas, with all units being one level.**
17. **Fourteen Pines (14P) in Eugene (65 units) for families and disabled residents. Occupancy occurred in 1996. These homes are in two-story buildings, centered around a number of court yard areas, with all units being one level.**

HACSA shall advance the objective to operate socially and financially sound programs, providing decent, safe and affordable housing to low income families representative of the range of incomes within the stipulated income guidelines.

A copy of this Statement of Policy has been placed in a conspicuous place in each of the above developments except scattered sites and at each place where applications for admission are taken or distributed. A copy is on file for public inspection at both HACSA offices at 300 W. Fairview in Springfield and 177 Day Island Road in Eugene.

#### **SPECIAL NOTE**

**HACSA is committed to the support and assistance of people with disabilities as defined in Section 504 of the Rehabilitation Act of 1973 and the Americans with Disabilities Act of 1990.**

**Applicants and residents needing and wishing assistance in reading and/or understanding the contents of this document are encouraged to contact the Public Housing Division to request such assistance.**

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**SECTION I. STATEMENT OF NON-DISCRIMINATION**

The Housing Authority and Community Services Agency of Lane County (Agency) shall not discriminate against or deny to any family, because of age, race, color, religion, sex, national origin, familial status, sexual orientation, or mental or physical disability status the opportunity to apply for or to participate in the Public Housing, Abbie Lane, **Village Oaks or Fourteen Pines Programs and other units owned and managed by the Public Housing Division**; nor shall the Agency or its staff take any intimidation or retaliatory action against any applicant or tenant because of participation in civil rights activities or for having asserted any of his or her rights under the Civil Rights Act.

It is the policy and determination of the Agency to comply fully with:

- A. Title VI of the Civil Rights Act of 1964.
- B. The Fair Housing Amendments Act of 1988.
- C. Executive Order 11063.
- D. Section 3 of the Housing and Urban Development Act of 1968.
- E. Section 504 of the Rehabilitation Act of 1973.
- F. The Age Discrimination Act of 1975, and with all rules, regulations and requirements issued pursuant thereto.
- G. The Americans with Disabilities Act of 1990.

**SECTION II. PUBLIC NOTICE TO LOWER-INCOME FAMILIES**

The Agency shall make known to the public through publication in newspapers of general circulation as well as through applicable minority media and other suitable means, the availability and nature of the Public Housing, Abbie Lane, **Village Oaks or Fourteen Pines Programs and other units owned and managed by the Public Housing Division** for lower-income families in accordance with appropriate HUD regulations and with the Agency's Equal Opportunity Housing Plan (EHOP).

Upon request, the Agency may refer assisted families to appropriate social service agencies.

**SECTION III. ELIGIBILITY REQUIREMENTS FOR ADMISSION**

An applicant must meet all the following requirements in order to qualify for admission:

A. The applicant must qualify as a Family (as defined in Section XXI, G of these Policies); and,

B. **Income Requirements:** Eligible income (as determined in Section XII of the Policies) shall not exceed the following amounts at the time of admission (or the most recent revision completed by HUD, if not reflected below):

1. OR 6-1 (Laurelwood Homes), OR 6-2,3 (McKenzie Village), OR 6-4 (Parkview Terrace), OR 6-5 (Lindeborg Place), OR 6-6 (Cresview Villa), OR 6-7 (Riverview Terrace), OR 6-9 (Veneta Villa), OR 6-15 (Scattered Sites) **Abbie Lane, Section 236 Subsidy at Village Oaks, and Fourteen Pines applicants must meet the Low Income Limits below**

<u>No. in Family</u>	<u>1</u>	<u>2</u>	<u>3</u>	<u>4</u>
Low Income Limits	<b>21,100</b>	<b>24,150</b>	<b>27,150</b>	<b>30,150</b>
	<u>5</u>	<u>6</u>	<u>7</u>	<u>8</u>
	<b>32,550</b>	<b>35,000</b>	<b>37,400</b>	<b>39,800</b>

2. To qualify for admission to OR 6-16 (Scattered sites and Pengra Court), OR 6-17, 20 & 023 (Scattered Sites), OR 6-18 (part of Cresview Villa) and 6-24 (Maple Wood Meadows), and Section 8 subsidy at Village Oaks and Fourteen Pines applicants must meet the Very Low Income Limits as noted below:

<u>No. in Family</u>	<u>1</u>	<u>2</u>	<u>3</u>	<u>4</u>
Very Low Income Limits	<b>13,200</b>	<b>15,100</b>	<b>16,950</b>	<b>18,850</b>
	<u>5</u>	<u>6</u>	<u>7</u>	<u>8</u>
	<b>20,350</b>	<b>21,850</b>	<b>23,350</b>	<b>24,900</b>

C. Meet the Selection Standards for Admissions outlined in Section IX, of this document.

**D. Social Security Number Requirements.** The applicant must both disclose and provide verification of the Social Security numbers for each member of the family who is at least 6 years of age. **Each family member over age 6 must provide one of the following :**

1. Social Security card. Other documentation that will be acceptable:
  - a. identification card from federal, state or local agency, employer, trade union or medical insurance agency,
  - b. IRS form 1099,
  - c. benefit award letters from government agencies, unemployment benefits award letter, income verification from SSA,
  - d. retirement benefit letters, life insurance policies, bank statements,
  - e. court records.

Other types of documentation will be rejected by the Agency unless the applicant/participant can show proof that the documentation is from a source where the family member had to provide documentation to that source in order for the documentation to be valid. Invalid or false documentation is not acceptable; or

2. A signed certification that they have not been assigned a Social Security number. **The parent or guardian shall sign this certification for all minors in the household.** The Agency cannot require applicants or tenants to apply for an SSN.
3. If the applicant is able to disclose the Social Security Number but cannot meet the documentation requirements, the applicant must submit the individual's Social Security Number and a certification that the Social Security Number(s) submitted has been assigned to the individual, but that acceptable documentation verifying the SSN cannot be provided. **The parent or guardian shall sign the certification and provide the documentation for all minors in the household.**
  - a. If this occurs, the applicant(s) may not become a participant(s) until documentation has been provided. The applicant(s) will retain their

position on the waiting list (please refer to Section IV Receipt of Applications and Determination of Eligibility) during this time period.

- b. The Agency may allow a resident 60 days from the date of the certification to obtain necessary documentation to verify the disclosed SSN. The Agency may, at its discretion, extend the period up to an additional 60 days.

E. Eligibility Restrictions Regarding Outstanding Amounts Owed to the Agency.

To be eligible, the applicant who was a former tenant or participant in a program operated by this Agency or any other Housing Authority cannot:

1. Have failed to make payments consistent with a repayment agreement with the Agency; or
2. Owe back rent or other charges to the Agency as a former tenant or participant in a program operated by the Agency or to any other Housing Authority ; or
3. Have failed to reimburse the Agency, or any other Housing Authority, for any amounts paid to an owner under a contract for rent or other amounts owed by the family under the lease.

An applicant who owes money to the Agency will be given the opportunity to pay the debt in full or sign a Promissory Note within a time period specified by the Agency. Provided the applicant pays the amount in full or signs the Promissory Note, the applicant may be placed on the waiting list. **If the applicant does not pay the debt in full or sign a Promissory Note within the specified time period, the applicant will be determined ineligible for all Agency housing assistance programs and all applications for Agency programs will be canceled.**

At the time the applicant comes to the top of the waiting list, any amount still owing on the Promissory Note must be paid in full by the date specified. If the balance owed on the Promissory Note is not paid in full by that date, the applicant will be declared ineligible and all application(s) for Agency programs will be canceled.

Any applicant who has committed actions consistent with any of items #1-3 above will be determined ineligible until the charges have been paid to the satisfaction of

the Agency. In order for an applicant to be determined ineligible on this basis, the charges must have been incurred after January 1, 1980.

**Any applicant who is determined to owe money to another Housing Authority will have the opportunity to resolve or repay the amounts owing within a time period specified by the Agency. If the applicant (or the Housing Authority) provides documentation that the amounts owing have been paid or resolved, the applicant may be placed on the waiting list as an eligible applicant. If the applicant fails to provide this documentation, they will be declared ineligible and all applications for Agency programs will be canceled.**

F. Restrictions to Eligibility: To be eligible, the applicant cannot have:

1. Committed fraud in connection with any Federal Housing program, or
2. Failed to disclose previously committed fraud in connection with any Federal Housing program, or
3. Been listed on HUD's List of Suspensions, Debarment, and Limited Denials of Participation, or
4. **Provided false information on their application and/or forms, or**
5. **Refused or failed to complete or supply information on their application and/or forms, or**
6. **Failed to meet the selection criteria outlined in this policy, or**
7. Failed to comply with Social Security Number disclosure requirements, or
8. **Failed to provide documentation for verification of citizenship or eligible immigration status, or**
9. **Been evicted for drug related criminal activity.**

An applicant who has committed any of the above will be determined ineligible for admission. **Applicants or Residents who have provided false information either prior to admission or while a participant in Agency owned housing may be determined ineligible for continued participation/assistance.** Applicants with Limited Denial of Participation as per F.3 above can have their application reconsidered after the expiration

of the limited denial.

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**SECTION IV. RECEIPT OF APPLICATIONS AND DETERMINATION OF ELIGIBILITY**

**A. Waiting Lists.**

1. **If an applicant is tentatively certified to be eligible, but the Agency determines that it cannot immediately offer a housing unit within the category or unit size for which that applicant is eligible, the Agency shall place that Family on its waiting list and shall so notify the Family (see Section IV.D.I).**
2. **The waiting lists shall be clearly marked to distinguish any Local Preference an applicant may qualify for.**
3. **Applications shall be accepted from all Families who are apparently eligible until such time as the taking of applications is suspended.**
  - a. **When the number of families on the waiting list becomes so great that there is no reasonable prospect of being able to offer a housing unit to additional applicants within the next 12 months, the taking of further applications may be suspended.**
  - b. **Any suspension of the acceptance of applications shall be publicly announced through general circulation newspapers throughout the county, contact with various social service agencies, minority associations, and other appropriate media, in accordance with applicable HUD regulations and the Agency's Equal Housing Opportunity Plan (EHOP).**
  - c. **If the suspension is only partial, the announcement shall include a statement identifying the unit size(s), community waiting list(s), complex location(s), preference and/or other category for which applications will continue to be accepted.**
4. **These waiting lists shall be kept current by requesting each applicant inform the Applications Department of any changes in his/her eligibility status or address change. Notations of dates of contacts and information obtained from the applicant shall be made a part of the**

application record.

5. **The Agency may send written notification to all applicants that they must notify the Applications Department of their continued interest. If the applicant has been so notified, and fails to respond regarding their continued interest, by the date specified in the notification, the Agency may purge the applicant from the waiting list.**
6. **If the family notifies the Agency that their family composition has changed such that the family is entitled to a different bedroom size other than that to which they were originally assigned, the family will:**
  - a. **Go to that place on the waiting list that represents the earliest date the family could have applied for their new bedroom size if that bedroom size waiting list was not open when the family initially applied; or**
  - b. **Receive the same date and time slot on the new bedroom size waiting list, if that list was open when the family initially applied.**

**B. Procedure Governing Receipt of Application:**

1. **The application constitutes the basic record of each family's request for admission. Each applicant may be required to supply information on family composition, income, assets, allowances, deductions, **any preference for which the Family qualifies and other requested information necessary to determine eligibility.** The applicant shall attest, by his/her signature, to the accuracy of the information provided. Each application shall be time and date stamped, **ranked by Local Preference** and unit size. Each application shall ask if the applicant or any member of applicant's family qualifies for a dwelling with alterations or features specifically for persons with a disability. **Reasonable accommodations or auxiliary aids will be made available, upon request, to assist applicants.****
2. **To facilitate the initial application process, a "preapplication" form will be used to tentatively establish the eligibility and preference status of the applicant. However, prior to placement in the housing unit, the applicant must have submitted all the necessary verification and documentation and attested by his/her signature to the accuracy of the information provided.**

- a. **The Agency will verify that the applicant met a preference at the time of the intake process. If the applicant's preference status changes after the offer of a unit, no change will be made in their eligibility status.**
  3. **All changes or corrections made to the application, in the presence of, or made by, HACSA staff will be made by lining through the original entry, entering the correct data and initialed by the person making the change.**
- C. Verification and Documentation of Applicant/Resident Data.
1. Applicants/Residents are required to furnish proof of their statements when required by the Agency, to reasonably assure accuracy.
  2. Applicants/Residents are required to sign a Authorization for Release of Information form(s) , at initial intake and **at least once per year** for the purpose of obtaining information and materials needed to complete an **application for admission, determine eligibility for and/or continued participation in Agency programs, recertification and the determination of rent or assistance payments.** The form(s) is effective for one year and one month and may contain consent for computer matching with safeguards.
  3. Certification forms by applicants/residents will normally be considered sufficient verification of Family Composition. Certification is provided by the applicant's signature on a **Statement of Applicant/Tenant Certification and Family Income and Composition Form.** The Agency may require additional documentation of Family Composition, when necessary, such as in the case of verifying a Stable Family Relationship or a child custody issue.
  4. Applicants shall provide verification **of eligibility for a Local Preference** in accordance with Section VI.
  5. Persons **status as a person with a disability, for eligibility purposes,** who are not receiving Social Security Disability or SSI benefits, must provide a statement from a medical practitioner/licensed psychologist to verify that they meet the definition of a person with a disability, as defined in **Section XII of these Policies.**

6. Appropriate certification shall also be required of all applicants/residents claiming a disability, as referred to in the Definition of Terms in Section XXI. If the applicant's eligibility depends on his/her meeting the definition of a person with a disability, the Agency may obtain relevant information concerning the applicant or **resident's physical or mental disability, to verify whether the disability is covered by the definitions in Section XXI of these Policies.**

The Agency may require the applicant/resident to provide documentation regarding this information. Such documentation may include: written statements from a medical practitioner/licensed psychologist, letters regarding qualification for SSDI or SSI payments, proof of residence in an institution, or documents showing hospitalization for a disability as defined in **Section XXI of these policies.**

7. Single pregnant women will be required to provide a medical practitioner's certification to verify pregnancy when it is the sole basis for determining eligibility. **Single pregnant women with no other persons in their household, will be placed on the two bedroom waiting list. The need for a second bedroom will be verified when the applicant comes to the Top of the Waiting List.**
8. Certification. As part of the application/resident record of each family admitted to the program, a designated staff member shall complete the Family Report (HUD-50058) for each family in the **Low-Rent Public Housing Program** and (HUD 50059) for each family in **Abbie Lane, Village Oaks, and Fourteen Pines.**

D. Notification to Applicants for Admission.

1. If an applicant is determined to be eligible, but the Agency has determined that it cannot offer the Family a housing unit at that time, the Agency shall place the Family on its waiting list and notify them of their placement on the waiting list and the approximate time that a housing unit may be offered, insofar as such a date can be reasonably determined.
2. If an applicant is determined to be ineligible on the basis of income, Family definition, or for any other reason, the Agency shall promptly notify the applicant in writing of the determination and the reasons. The notice shall

state that the applicant has the right to request an Informal *Hearing* within a reasonable time (specified in the notice).

Exception: If the reason for the ineligible determination is because of money owing and notification of the opportunity for an **Informal Hearing** was sent to the Family at their last known address, and they did not request an the **Informal Hearing** at that time, no new **Informal Hearing** will be offered and the ineligibility determination will stand.

- a. . . . If, after conducting an **Informal Hearing**, the Agency determines that the applicant is ineligible, it shall so notify the applicant in writing. The applicant is not entitled to a Formal Hearing if determined ineligible in an **Informal Hearing**. Please refer to Appendix A (Appeal Process for Applicants) for the complete procedure and policy regarding **Informal Hearings for Applicants**.
  - b. If the Agency has determined the applicant is ineligible, the application will be canceled. The applicant would have to reapply for the program in order to be placed on the waiting list again.
  - c. The procedures of this section do not preclude the applicant from exercising his/her other rights if he/she believes that he/she is being discriminated against on the basis of age, race, color, religion, sex, national origin, familial status, sexual orientation, or mental or physical disability status.
  - d. The Agency shall retain for three (3) years a copy of the application, the notification letters, the applicant's response, if any, the record of any **Informal Review or Informal Hearing**, and a statement of the final disposition. Three years shall begin from the final disposition of the application.
3. The applicant may request an Informal Review of their status and the procedures described in D.2. of this Section will apply.

**SECTION V. VERIFICATION OF THE QUALIFICATION FOR A FEDERAL PREFERENCE\***

*\* Due to the elimination of the requirement for Federal Preferences, this section has been deleted.*

**SECTION VI. RANKING OF APPLICATIONS BY LOCAL PREFERENCE**

Each application received will be initially screened to determine the Local Preference, if any, for which the applicant may be eligible. Applications will be ranked by Local Preference and the date and time the application(s) is/was received by the Housing Authority. Applications will be ranked by category in the order listed below:

1. Applicants who are currently receiving a HACSA subsidy and are over/under housed according to the occupancy guidelines for their current housing program.
2. Applicants who are currently receiving a HACSA subsidy that have requested to transfer between HACSA programs and the transfer is considered in HACSA's best interest.
3. Applicants who are not currently receiving a HACSA subsidy.
4. All other applicants.

**SECTION VII. TENANT SELECTION AND ASSIGNMENT PLAN**

- A. Separate Community Waiting Lists. The Agency maintains the following separate community waiting lists for the Public Housing Program:

- |                                |                                                                                                                                                             |
|--------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <u>Family Units.</u>           | <ol style="list-style-type: none"><li>a. Eugene/Springfield</li><li>b. Florence</li><li>c. Veneta</li></ol>                                                 |
| <u>Elderly/Disabled Units.</u> | <ol style="list-style-type: none"><li>a. Eugene/Springfield</li><li>b. Junction City/Veneta</li><li>c. Cottage Grove/Creswell</li><li>d. Florence</li></ol> |

Other waiting lists are maintained for Abbie Lane, Village Oaks and Fourteen Pines. References to geographical preference and community waiting lists are not applicable to these complexes.

- B. Applicant Opportunity to be Placed on All Waiting Lists. Applicants will be informed

of the opportunity to apply for housing in any and all communities for which the Agency maintains separate community waiting lists. An applicant may be placed on as many lists as he/she desires and will be considered for housing in the applicable communities in order of date and time of application **and local preference**, until an offer of housing is accepted or refused without good cause. No preference shall be allowed on the basis of an applicant's residence in a specific community within the Agency's jurisdiction. The Agency will not permit applicants to request housing in a particular project.

- C. Applicant Reaches Top of Waiting List. When an applicant family is near the top of a community waiting list and an expected vacancy occurs, the applicant will be so notified by mail. This letter will inform the applicant family that they need to respond in writing, by a specified date, as to their acceptance or rejection of the unit, so that the Agency may begin the intake process.

The letter will also state that, if the applicant does not respond by the specified date, the Agency will assume they are not interested in housing assistance and their application will be canceled. The letter will state the family **has a right** to appeal the decision to cancel their application and that they may request an Informal Review regarding this decision, by contacting the Agency, either verbally or in writing, by a specified date. Please refer to Appendix A (Appeal Process for Applicants) for the complete procedure and policy regarding Informal Reviews/Hearings.

The Agency operates under a system of one-offer, one-refusal without good cause, before an applicant is placed at the bottom of all community waiting lists.

- D. Applicant Acceptance of Unit. If the applicant responds that they are willing to accept the unit, the Agency will begin the process of determining whether the applicant meets the family definition and income eligibility requirements (Section III) and Agency selection criteria (Section IX).
- E. Applicant Refusal of Unit. If the applicant refuses the unit, the applicant will be requested to explain why they are unable to accept the unit. If the Agency determines that the reason for refusal indicates good cause or undue hardship, the applicant will remain on all community waiting lists, for which he/she has applied, according to the date and time of original application, until the next unit in the appropriate bedroom size becomes available. If the Agency determines that the reason for refusal does not indicate good cause or undue hardship, the application will be placed at the bottom of each community waiting list for which the applicant

has applied, with the date of refusal being the new application date.

- F. Definition of Good Cause or Undue Hardship. Good cause or undue hardship reasons for rejecting a unit include, **but are not limited to**, the following:
1. The unit contains lead-based paint and accepting the offered unit could result in subjecting the applicant's children, under **six** years of age, to lead-based paint poisoning.
  2. Acceptance of an offer would make employment, health care, support services or day care facilities inaccessible. However, where public transportation is available, rejections based upon inaccessibility will not be considered good cause.
  3. Special accessibility or disability needs are not met by the particular unit offered.
- G. Clear Evidence of Good Cause. The applicant family must present clear evidence which substantiates, to the satisfaction of the Agency, that good cause or undue hardship exists if the family were to accept a particular unit. If the Agency determines that the applicant has shown good cause or undue hardship for a particular unit, that good cause or undue hardship reason will be valid for a six-month period for a unit in that community waiting list. If another unit in that waiting list community becomes available after six months, and the applicant refuses a unit, the applicant would again need to evidence good cause or undue hardship to the satisfaction of the Agency. An applicant may withdraw a good cause or undue hardship reason for a specific community waiting list, prior to six months.
- H. Documentation of Unit Offers. Documentation of each unit offer will be maintained in the applicant's file. If a unit has been offered and refused with or without good cause, the circumstances and reason will be clearly documented. If a unit is inappropriately offered (e.g., the unit is the wrong bedroom size, because the applicant's family composition has changed), and refused with valid reason, the circumstances and reason will be clearly documented.
- I. Unit Offer to Family. The applicant family will be offered the unit when all of the following conditions exists:

1. The applicant meets all eligibility and selection criteria for placement in a Public Housing, **Abbie Lane, Village Oaks or Fourteen Pines** unit and all necessary verifications are complete; and
  2. A particular unit is available; and
  3. The applicant has the next application on the Public Housing community waiting list in which the unit is located or on the **Abbie Lane, Village Oaks or Fourteen Pines waiting list**, according to date and time of application.
- J. Agency Records. The Agency will maintain identification of the unit offered, including unit location, date of offer, and date of each rejection or acceptance. The Agency will maintain the name, bedroom (family) size, elderly/disabled status, race/ethnicity, and priority ranking (i.e., date/time of application) of each applicant to whom an offer is made.

#### **SECTION VIII. ORDER OF PREFERENCES IN THE SELECTION OF TENANTS**

- A. Applicants shall be selected for vacant units in the Public Housing, **Abbie Lane, Village Oaks, Fourteen Pines, or other programs required by HUD Handbook 4350.3** with no requirement or preference based upon the identity or location of the housing which is occupied or proposed to be occupied, nor upon the length of time an applicant has resided in the jurisdiction. Also no preference will be given to applicants based on residency in a specific locality or area within the county. The selection shall be by **Local Preference, in the order described in Section VI.**
- B. Single persons as defined in **Section XXI** of these policies, will be permitted to occupy vacant units at OR 6-7 (Riverview Terrace) under the following conditions:
  - a. When there are no eligible applicants meeting the designations within the definition of family which includes: Stable Family Relationship, Disabled Person, Elderly Family, Remaining Member of a Tenant Family, Displaced Person, and
  - b. When a Single Person meets the eligibility requirements and the selection standards for admission.

- C. When vacancies occur at OR 6-7 (Riverview Terrace), the Selection procedure shall be in the following order:
1. A verified, eligible applicant meeting the family definition criteria in B.1. above and who qualifies for a Local Preference. Families will be assisted in order of their Local Preference as described in Section VI.
  2. A verified, eligible Single Person who qualifies for a Local Preference. Single Persons qualifying for a Local Preference will be assisted in the order described in Section VI.
  3. A verified, eligible Single Person who does not qualify for a Local Preference.

#### **SECTION IX. SELECTION STANDARDS FOR ADMISSION**

- A. The Agency shall review each applicant family's (including all members) current and previous rental history for the following considerations:
1. Past performance in meeting financial and lease obligations, including rent obligations, and
  2. Past performance in caring for rental property, and
  3. Past performance in getting along with neighbors.
- B. The Agency will review the criminal history and/or court records for all members of an applicant family. Applicant may be asked to submit fingerprints for State or NCIC records check. Applicants with a record of criminal activity, drug related criminal activity or any other crimes that would pose a threat to property or to the life, health, safety or peaceful enjoyment of residents, neighbors or Agency staff may be denied assistance. Drug related criminal activity includes, but is not limited to: the illegal manufacture, sale, distribution, use or possession of a controlled substance and the illegal possession of a controlled substance with the intent to use, manufacture, sell or distribute the substance.

**The Agency has a zero tolerance policy for all drug related activity. The Agency may deny admission to an applicant if any household member is currently using an illegal controlled substance or if the Agency has reasonable cause to believe that the applicant's (or other household member's) use or pattern/history of illegal use, of a controlled substance may interfere with the health; safety or right to peaceful enjoyment by other residents. The Agency may also deny admission to an applicant if they or any other household member abuses alcohol or has a history or pattern of alcohol abuse that the Agency has reasonable cause to believe may interfere with the health, safety or right to peaceful enjoyment by other residents.**

**The Agency will deny admission to any applicant family with a criminal record of an arrest, charge or conviction for the manufacture, sale, or distribution of a controlled substance, or possession with intent to manufacture, distribute or sell a controlled substance.**

- C. **If unfavorable information is received on any member of the applicant family for one or more of the reasons stated above, the Agency may deny the applicant family admission to the Public Housing, Abbie Lane, Village Oaks or Fourteen Pines Program(s).**
- D. **In the event information unfavorable to the applicant is received or there is reasonable suspicion as to the accuracy or reliability of the information received on behalf of the applicant, or there is a lack of information available, the Agency may conduct a more in-depth evaluation of the applicant, including but not limited to: past and present employers, social service agencies, law enforcement agencies, schools and colleges, courts and post offices, credit providers, credit bureaus, utility companies or other sources as deemed necessary to determine eligibility.**
- E. **The Agency shall, in the evaluation of current and previous rental information unfavorable to the applicant, give consideration to the time, nature, and extent of the applicant's conduct and to factors which might indicate a reasonable probability of favorable future conduct or financial prospects in its decision to either accept or deny an application for admission.**
- F. **The Agency may, on a case by case basis, review evidence such: the seriousness and recentness of a crime, completion of an Agency approved substance abuse rehabilitation program (with no further documentation of criminal activity or activities that disturb other's peaceful enjoyment) or other information that may affect the Agency's decision on the applicant family's eligibility for the program.**

- G. **The Agency may deny assistance to applicant families who have been evicted from assisted or non-assisted housing for drug related activity. Assistance will also be denied to persons illegally using controlled substances.**
- H. When the applicant is unable to furnish current or previous rental history, because of not being or not having been a renter, the applicant will be asked to identify **alternate** sources, as defined by the Agency, that can furnish the information described in paragraph A of this Section concerning the applicant. If the applicant cannot provide **alternate** reference sources as defined in paragraph D of this section, or **adequate rental or credit references, that can provide verifiable** information as described in paragraph A of this section, the Agency may deny, but shall not unreasonably deny, the applicant housing assistance. **Applicants with less than two years of acceptable rental reference history or who provide alternate references may be asked to provide a Co-signer Agreement.**
- I. Lease Compliance. The applicant must be able to comply with the terms of a lease agreement. Exception: The applicant can provide documentation from a medical practitioner that the need for a Live-in-Aide (as defined in Section XXI.), exists.
- J. Required Orientation Session(s). **All members of the applicant family who are 18 years or older** are required to attend an orientation session(s) covering the responsibilities of being a resident in Public Housing, **Abbie Lane, Village Oaks or Fourteen Pines** prior to the applicant being accepted for placement in a housing unit. Failure to attend the required session(s) will result in the application being canceled.
- K. The Agency may conduct a home visit on any applicant family to assist the Agency in determining the applicant family's ability to meet the criteria outlined in this section.
- L. Non-Discrimination on Admission. The admission standards, as defined in this Section, will not automatically deny admission to a particular group or category of otherwise eligible applicants on the basis of characteristics attributed to the group or class of which the applicant is a member.

## SECTION X. OCCUPANCY STANDARDS

The following standards shall be observed in designating the unit size for which a Family is eligible:

- A. Unit size is based upon the number of bedrooms in a unit. No unit shall be approved for leasing to a Family whose composition, in accordance with these

standards, requires a bedroom to be over-occupied or allows a bedroom to be unoccupied, except as defined in paragraphs B & C below.

- B. Unit size shall be assigned so that not more than two persons of the same sex, shall occupy the same bedroom, except that:
1. Husband and wife, or two persons who have evidenced a Stable Family relationship, or a head of household in a single parent family, or a single pregnant woman, shall occupy a single bedroom;
  2. One child under six (6) years of age may occupy a single parent's bedroom;
  3. Two children of opposite sex under six (6) years of age may occupy the same bedroom;
  4. Two adults (18 years and older) related by blood, of the same sex, may occupy separate bedrooms.
  5. Two elderly/disabled adults, not related by blood or marriage, may occupy separate bedrooms.
  6. One adult (18 years and older) and one child (17 years and under) of the same sex, may occupy separate bedrooms if the Agency determines special family circumstances exist. If the Agency allows separate bedrooms, the file shall document why this determination was made.
  7. A non-head-of-household parent living with his/her child will receive a one-bedroom allocation for parent and child until the child reaches the age of six.
  8. When a special medical need exists, in the judgment of the Agency, persons otherwise required to share a bedroom may be permitted to occupy separate **bedrooms**.
- C. When a family member has been determined by a medical practitioner to require a live-in-aide (Section IX. I. and Section XXI. P.) for the purpose of providing necessary supportive services to that family member, the Agency will grant an extra bedroom for the live-in-aide.

D. The above principles result in the following standards:

<u>Bedroom Size</u>	<u>Minimum No. of Persons in Household</u>	<u>Maximum No. of Persons in Household</u>
0-BR	1	1
1-BR	1	2
2-BR	2	4
3-BR	3	6
4-BR	5	8
5-BR	7	10

E. The minimum and maximum limits may be waived when it becomes necessary to make temporary use of available vacant units or in extreme and unusual circumstances.

F. This paragraph applies only to applicants for, and residents of, Maple Wood Meadows. Two children of the same sex may be assigned separate bedrooms.

The above standard results in the following occupancy standard:

<u>Bedroom Size</u>	<u>Minimum No. of persons in Household</u>	<u>Maximum No. of persons in Household</u>
3-BR	2	6
4-BR	4	8

**SECTION XI. LEASING OF DWELLING UNITS TO ELIGIBLE FAMILIES**

- A. A lease agreement shall be executed between the Agency and the Head of Household prior to actual admission.
- B. A Resident Handbook shall be provided to the resident at lease-up. This Handbook shall be included as part of the lease by reference.
- C. The lease agreement contains the obligations of tenancy, which includes the lease responsibilities and the **State and Federal** program responsibilities for **resident families participating in the Agency's Public Housing, Abbie Lane, Village Oaks or Fourteen Pines program(s).**

- D. **The lease agreement will be month to month. A resident's eligibility will be recertified at least one time per year.**
- E. **If, through any cause, the signer of the lease agreement ceases to be a member of the resident family, the lease shall be voided and a new lease agreement executed and signed by the current Head of Household and the Agency, provided the Family is eligible for continued occupancy.**
- F. **If a family transfers to a different housing unit operated by this Agency, the existing lease agreement shall be terminated and a new lease agreement executed by the Head of Household and the Agency for the dwelling into which the resident family is to move.**
- G. **If at any time during the life of the lease agreement, any other change in the status of the resident results in the need to change or amend any provisions of the lease, an appropriate lease rider or lease renewal shall be prepared and made part of the existing lease agreement. All lease riders and lease renewals shall be signed and dated by the signer(s) of the lease agreement and the Agency.**
- H. **An adult member of the household requesting the removal of another adult from the lease agreement must provide the Agency with a written statement from the adult being removed from the lease which includes: the date the adult vacated the unit, their new forwarding address and their request to be removed from the lease. If this written statement is unavailable, the adult remaining in the household may provide the Agency with a notarized statement requesting the adult be removed from the lease agreement. The notarized statement must include the date the person moved from the household, a statement that the adult has removed all of their personal belongings from the unit and to the best of their knowledge the adult has no intention of returning to the household. An adult removed from the household must wait at least six months before reapplying to be added to the household.**
- I. **The lease agreement shall be kept current at all times and reflect rent being charged and the conditions governing occupancy, and shall be in accordance with State and local laws and Federal regulations.**
- J. **Termination of a resident's lease agreement shall be in accordance with the provisions contained in the dwelling lease.**

The Agency may evict a resident(s) who the Agency has reasonable cause to believe has engaged in criminal activity (on or off the property) against property, or that may threaten the health, safety or right to peaceful enjoyment of other residents.

The Agency may evict residents who the Agency has reasonable cause to believe engages in drug related criminal activity or whose abuse of alcohol interferes with the health, safety, or right to peaceful enjoyment of the premises by other residents. Criminal activity, drug activity or alcohol abuse by residents, family members, or guests or other members under their control, may be cause for termination of the lease.

The Agency may, on a case by case basis, review the seriousness, recentness or other factors related to the activity. The Agency does not need an arrest or conviction to terminate a resident's lease.

- K. If the resident family has money owing under the lease following their vacate and it is not paid nor have arrangements been made to pay within a reasonable time after being billed by the Agency, the account may be sent to a credit bureau for collection.
- L. Only those persons listed on the lease agreement are permitted to occupy the unit. A new member may be added to the household if he/she meets the selection standards for admission to the Public Housing and/or Abbie Lane, Village Oaks or Fourteen Pines program(s) and completes the application process. The Agency retains the right to deny admission of new family members, especially if by adding the member(s), it will require a change in the bedroom size required by the Family.
- M. If the resident leases a unit with features/alterations for people with disabilities and no family member needs these features, then the resident must agree to move to another unit consistent with other provisions of this policy when a tenant requiring such features reaches the top of the waiting list or meets the transfer provisions.

## **SECTION XII. DETERMINATION OF INCOME FOR ELIGIBILITY AND TOTAL TENANT PAYMENT**

- A. Purpose and Scope. This section sets forth policies and procedures for determining income for eligibility, and the Total Tenant Payment for eligible Families on the Public Housing, Abbie Lane, Village Oaks and Fourteen Pines Programs.

These policies and procedures shall be applicable in making such determinations for purposes of initial occupancy as well as in connection with regular or interim re-examinations of Family income, composition, and the extent of medical or other allowable expenses.

B. Computation of Annual Income.

Annual income is the anticipated total gross income from all sources received by or available to, the family head and spouse and to each additional member of the family (even if temporarily absent), including all net income derived from assets for the 12-month period following the effective date of certification of income, exclusive of certain types of income as provided in this section. **Annual income includes amounts monetary or not that go to or on behalf of a family member and are received from a source outside the family.** This section is subject to revisions in the Code of Federal Regulation, HUD regulations or Housing Authority policy.

Any withdrawal of cash or assets from an investment will be included in income, except to the extent the withdrawal is reimbursement of cash or assets invested by the family.

1. Except as provided in paragraphs 2.(a) - (v) below, all payments from all sources received by the Family head and each additional member of the Family household (even if temporarily absent) who is not a minor shall be included in the annual income of a Family. Income shall include, but not be limited to:
  - a. The full amount, before any payroll deductions of wages and salaries, overtime pay, commissions, fees, tips and bonuses, and other compensation for personal services;
  - b. The net income from operation of a business or profession or from rental of real or personal property (for this purpose, expenditures for business expansion or amortization capital indebtedness shall not be deducted to determine the net income from a business);
  - c. Interest and dividends, and other net income of any kind from real or personal property. If it is not feasible to anticipate a level of income over a 12-month period, the income anticipated for a shorter period may be annualized, subject to a redetermination at the end of the shorter period;

- d. Net Family Assets in excess of \$5,000: annual income shall include the greater of the actual income derived from all Net Family Assets or a percentage of the value of such assets based on the current passbook savings rate as determined by HUD (imputed income):
- i. The assessed value of an applicant or tenant owned real property being disposed of shall be reduced by:
    - \* Seven percent of the assessed value as the average cost of selling the property;
    - \* One-quarter of one percent (0.25%) of the assessed value as one-half the average cost of escrow closing.
  - ii. When the property is sold, the selling price shall be reduced by actual costs to seller (applicant or participant).
  - iii. Every applicant and participant family will be asked to declare the current disposition of all assets including: savings, IRA's, bonds, etc. If these assets are still being held, the current balances will be used to produce Net Family Assets, either imputed or actual. If these assets have been cashed in and withdrawn, the actual amount received, minus penalties for early withdrawal, will be used to produce Net Family Assets.
  - iv. The total value of stocks and similar securities shall be reduced by the percentage charged by the issuing firm to sell the securities.
- e. The determination of Net Family Assets shall include the value of any assets disposed of by an applicant or participant for less than fair market value (including a disposition in trust, but not in a foreclosure or bankruptcy sale) during the two years preceding the date of application for the program or re-examination, as applicable.

In the case of a disposition as part of a separation or divorce settlement, the disposition of family assets are not considered to be for less than fair market value if the applicant or participant receives important considerations not measured in terms of dollar amounts.

- f. The full amount of periodic payments received from Social Security, annuities, insurance policies, retirement funds, pensions, disability or death benefits and other similar types of periodic receipts, **including lump-sum payments caused by delays in processing periodic payments, such as unemployment or welfare assistance benefits (except for Social Security and SSI lump sum payments);**
- g. Payments in lieu of earnings, such as unemployment and disability compensation, workers' compensation, and severance pay (See paragraph B.2.c.).
- h. For Public Assistance: 1) the amount of the allowance or grant excluding the amount specifically designated for shelter and utilities; plus 2) the maximum amount which the Adult and Family Services Agency could in fact allow for the family for shelter and utilities.

**If the applicant or resident has been sanctioned or disqualified for non-participation with Adult and Family Services and the grant is available to the family, if they were willing to participate, the Agency will continue to include the entire amount of the grant available to the household if they were willing to participate, in the calculation of annual income .**

- i. Periodic and determinable allowances, such as alimony and child support payments, and regular contributions or gifts received from persons not residing in the dwelling.
  - j. All regular pay, special pay and allowances of a member of the Armed Forces.
  - k. Relocation payments made pursuant to Title II of the Uniform Relocation Assistance and Real Property Acquisition Policies Act of 1970.
2. The following items shall not be included as income:
- a. Temporary, non-recurring or sporadic income (including gifts).
  - b. Amounts which are specifically for, or in reimbursement of, the cost of medical expenses for any family member.

- c. Lump-sum additions to Family assets, such as inheritances, insurance payments (including payments under health and accident insurance and workers' compensation), capital gains and settlement for personal or property losses (See paragraph B.1.f. above).
- d. **Full amount of student financial assistance paid directly to the student or the educational institution.**
- e. Income of a live-in aide.
- f. Special pay to a family member serving in the Armed Forces who is exposed to hostile fire.
- g. Income from the employment of children under the age of 18,(including foster children).
- h. **Payments received for the care of foster children and foster adults unrelated to the tenant family who are unable to live alone.**
- i. The value of coupon allotments for the purchase of food pursuant to the Food Stamp Act of 1964 which is in excess of the amount actually charged the eligible household.
- j. Amounts received under training programs funded by HUD.
- k. Amounts received by a disabled person that are disregarded for a limited time for purposes of Supplemental Security Income eligibility and benefits because they are set aside for use under a Plan to Attain Self-Sufficiency (PASS).
- l. Amounts received by a participant in other publicly assisted programs which are specifically for, or in reimbursement of, out-of-pocket expenses incurred (special equipment, clothing, transportation, child care, etc.) and which are made solely to allow participation in a specific program.
- m. **Amounts received under a resident service stipend, not to exceed \$200 per month.**
- n. **Incremental earnings and benefits to a family member from participation in a qualifying State or local employment training program. Amounts excluded must be received under training**

programs with clearly defined goals and objectives and are excluded only for the period during which the family member participated in the program.

- o. **Earnings in excess of \$480 for full time students 18 and older; excluding the head of household and spouse.**
- p. **Adoption assistance payments in excess of \$480 per adopted child.**
- q. **Reparation payments paid by foreign government pursuant to claims filed for persons persecuted during the Nazi era.**
- r. **Earnings and benefits to any family member from participation in employment training programs and supportive services in accordance with the Family Support Act of 1988, Section 22 of the 1937 U.S. Housing Act, or any comparable Federal, State or local law during the exclusion period. The exclusion period means the period during which the family member participates in the program, plus 18 months from the date the family member begins the first job acquired after completion of the programs not funded by public housing assistance under the 1937 U.S. Housing Act. If the family member is terminated from employment with good cause, the exclusion period will terminate. Earnings and benefit mean the INCREMENTAL amount resulting from the training program or employment.**
- s. **Deferred periodic payments from Social Security or SSI.**
- t. **Amounts received by the family in refunds or rebated for property taxes paid on the unit.**
- u. **Amounts paid by a state agency to a family with a member who is developmentally disabled and living at home to offset cost of services and equipment needed to keep the developmentally disabled family member at home.**
- v. **Amounts specifically excluded by any other Federal Statute from consideration as income for purposes of determining eligibility or benefits under a category of assistance programs that includes assistance under the U.S. Housing Act of 1937. A list of these**

exclusions is below:

- i. The value of the allotment provided to an eligible Household for coupons under the Food Stamp Act of 1977;
- ii. Payment to volunteers under the Domestic Volunteer Service Act of 1973;
- iii. Payments received under the Alaska Native Claims Settlement Act;
- iv. Income derived from certain sub-marginal land of the United States that is held in trust for certain Indian tribes;
- v. Payments or allowances made under the Department of Health and Human Services' Low Income Home Energy Assistance Program;
- vi. Payments received under programs funded in whole or in part under the Job Training Partnership Act;
- vii. Income derived from the disposition of funds of the Grand River Band of Ottawa Indians;
- viii. The first \$2,000 of per capita shares received from judgment funds awarded by the Indian Claims Commission or the Court of Claims or from funds held in trust for an Indian tribe by the Secretary of the Interior;
- ix. Amounts of scholarships funded under Title IV of the Higher Education Act of 1965 including awards under the Federal work-study program or under the Bureau of Indian Affairs student-assistance programs that are made available to cover the costs of tuition, fees, books, equipment, materials, supplies, transportation, and miscellaneous personal expenses of a student at an educational institution;
- x. Payments received from programs funded under Title V of the Older Americans Act of 1965; and
- xi. Earned Income Tax Credits.

C. Verification of Applicant/Participant Data.

18. Applicants/Participants are required to sign an Authorization for Release of Information Form at intake and each year at recertification for the purpose of obtaining information and materials needed to complete and maintain continued assistance in the program. The form is effective for one year and one month and contains consent for computer matching within defined limitations.
2. All earned income shall be verified at the time of admission or re-examination through **third party verification by the employer**, earning statements from the employer, W-2 forms, check stubs, and/or other means necessary to assure accuracy.
3. Unearned income shall be verified by **third party verification**, viewing checks, award letters, and/or other documentation supplied by the verifying agency in order to assure accuracy.
4. Verification of income, assets, expenses or other necessary information by telephone or fax, is adequate provided that the verifying agency is asked to followed up with a written statement regarding the information. Information received by telephone shall include: date of contact; person providing information; agency affiliation and phone number; information received, including – in case of payments – the amount and rate of payments; and initials or signature of Agency staff person receiving the information.
5. If verification of income and assets is by witnessing documents in the tenant's possession and copies cannot be secured for the file, the following information will be documented for the file:
  - a. Date document witnessed;
  - b. Description of document, i.e., passbook account number, check number and date;
  - c. Information obtained, i.e., payee, amount, rate;
  - d. Signature of Agency staff person; and
  - e. Signature of tenant.

D. Verification and documentation of Social Security Numbers (SSN). The Social Security numbers for all family members over the age of six shall be disclosed and documented at the time of admission or re-examination. A valid SSN card issued by the Social Security Administration is primary documentation. In those instances

where a valid SSN card is not available, one of the documents described in Section III.D. of these Policies may be substituted as verification.

**E. Computation of Total Tenant Payment on a Monthly Basis.**

1. Total Tenant Payment shall be the highest of the following, (rounded to the nearest dollar):
  - a. Thirty percent (30%) of monthly income after allowances;
  - b. Ten percent (10%) of gross monthly income;
  - c. Shelter in Kind, (the amount designated by the State Agency to meet the family's housing costs, if the family receives Public Assistance from the State of Oregon); or
  - d. \$25.00.

**SECTION XIII. SECURITY AND UTILITY DEPOSITS**

- A. Each Family entering into a lease agreement with the Agency shall be required to pay a security deposit as follows:**

**CATEGORY 1 - \$100.00 SECURITY DEPOSIT REQUIRED**

**Veneta Villa**

**Parkview Terrace**

**Riverview Terrace**

**Cresview Villa**

**Lindeborg Place**

**CATEGORY 2**

**1 BEDROOM \$100.00 SECURITY DEPOSIT REQUIRED**

**2 BEDROOM \$300.00 SECURITY DEPOSIT REQUIRED**

**3 BEDROOM \$450.00 SECURITY DEPOSIT REQUIRED**

**4 BEDROOM \$450.00 SECURITY DEPOSIT REQUIRED**

**Mckenzie Village**

**Pengra Court**

**Scattered Sites**

**Laurelwood Homes**

**Veneta Scattered Sites**

**Maplewood Meadows**

**CATEGORY 3 - ABBIE LANE, VILLAGE OAKS & FOURTEEN PINES**

**Security Deposits for Abbie Lane, Village Oaks and Fourteen Pines are equal to the Total Tenant Payment or \$50.00, whichever is more, as regulated by HUD Handbook Section 4350.3.**

- B. Payment of the security deposit shall be in accordance with the provisions of the lease agreement.
- C. If a resident family vacates a unit, the Agency, subject to State and local law, may utilize the deposit as reimbursement for any unpaid rent or other amounts owed under the lease.
- D. If a resident family vacates the unit owing no rent or other amount under the Lease, or if such amount is less than the amount of the security deposit, the Agency shall refund the full amount or the unused balance as the case may be, to the Family, in accordance with Oregon landlord/tenant laws.
- E. Families shall be expected to obtain the funds to pay security and utility deposits, if required, from their own resources and/or other private or public sources. Payment of security deposits must be paid before occupancy can occur. The Agency may, at its discretion, allow applicants or residents to sign a Promissory Note for future payment of the rent or deposit.
- F. Families who transfer from one residence to another residence, who have a past history of meeting their financial responsibilities, may be allowed to pay any additional Security Deposit owed to the Agency in payments, after signing a Promissory Note. Families transferring will have their initial security deposit transferred to the new unit and may be required to pay additional amounts prior to moving. Any rent, maintenance, vacate or other charges owed by the resident will be billed to the tenant for payment. These charges will not be deducted from the security deposit. The security deposit will not be used until the resident is vacating the program.

**SECTION XIV. TRANSFER OF RESIDENTS**

- A. If the Agency determines that the resident family is residing in a dwelling unit smaller than appropriate by reason of an increase in the family size, or the resident family is residing in a unit larger than appropriate because of a reduction in family size, the Agency shall issue the tenant family written notice of not less than 30 days

- that the Family will be relocated to a dwelling unit of the appropriate bedroom size. **A resident may choose to transfer in less than thirty days if a suitable unit is available and offered by the Agency.** Upon receipt of notification that the resident must transfer to an appropriate sized unit the resident may request an explanation of the specific information used, and, if the resident disagrees with the information, may request an Informal Hearing according to the Grievance Procedures in the Statement of Policy.
- B. If the resident is residing in a unit that is equipped with special features for people with disabilities and no current family member is in need of the features, the Agency may terminate the Lease Agreement and reassign the resident to an appropriate unit without such features. Management shall give the resident at least thirty (30) days' notice of the termination of the Lease. **The Resident is responsible for all costs associated with the move.**
- C. Need for Full-time Live-in Care. If it becomes necessary for a Resident to have full-time live-in care, requiring a housing unit with an additional bedroom, a transfer request may be approved by the Agency with documentation provided by a medical practitioner to the satisfaction of the Agency that such a need exists. **The Agency may, during occupancy, periodically review the Resident's or family member's need for continued live in care.** The Agency must also approve the addition of the Live-In Aide prior to occupancy.
- D. Need to move for Employment. If a Resident in Veneta Villa or Veneta Scattered Sites (OR 6-9) or Laurelwood Homes (OR 6-1) becomes employed full-time in either Eugene or Springfield, a transfer request may be approved by the Agency, with documentation from the Employer regarding the circumstances of the employment. Documentation must be to the satisfaction of the Agency.
- E. Need to move for Educational Training. If a tenant residing in Laurelwood Homes (OR 6-1) has received a grant or scholarship to attend an educational training program in Eugene or Springfield and becomes accepted and enrolled full-time in such a program, a transfer request may be approved by the Agency, with documentation provided by the educational institution to the satisfaction of the Agency.
- F. Extreme, Unusual or Emergency Condition.
1. Any situation in this category must be because of a circumstance that has occurred with the Resident that is extremely out of line with a normal living pattern or a dire emergency in the family's life and must clearly be able to be documented as such.

2. The Agency must also be able to identify that it is clearly in the Agency's best interests for this transfer to be authorized.
  
- G. **A Resident participating in the Agency's Family Self Sufficiency (FSS) Program may request a transfer from Veneta (6-9) or Florence (6-1), to assist them in meeting the goals of their Self Sufficiency Plan. Documentation to the satisfaction of the Agency will be required and the HACSA FSS caseworker must provide written documentation supporting the transfer. Additional documentation from employers, schools, etc., may be considered.**
  
- H. The Resident must be a tenant in good standing, meeting the terms and conditions of the Lease Agreement, and be eligible for continued occupancy, for a transfer request to be approved.
  
- I. All transfer requests will be forwarded to Intake only after a maintenance inspection indicates that vacate charges to the Resident will be less than \$200.00. **The Agency may re-inspect and re-evaluate the Resident's eligibility for a transfer, as necessary.** Note: Maintenance will notify the appropriate Housing Representative of any unit that will require \$200.00 or more to restore the unit to the condition that existed before the resident moved in, excluding normal wear and tear. Residents with more than \$200.00 in expected vacate charges will not be approved for transfer.
  
- J. The Resident must have all accounts with the Agency paid in full prior to any offer of transfer housing. **Any promissory note agreements must be up to date and in good standing.**
  
- K. Residents will be placed in the first appropriate housing unit available in their current program. The Agency may offer a transfer to another program if the Agency believes the waiting time for the proper size unit will be excessive **and the transfer is considered to be in the Agency's best interest.**
  
- L. The Resident family is responsible for moving all of its goods and possessions to the new unit and returning the keys to the former unit, to the Agency within one (1) day of receiving the keys to the new unit. The Resident will be charged a daily prorated amount based on the Resident's current monthly rent for that particular unit. The Resident will begin paying rent for the new unit on the effective date of the new lease agreement. If the Resident fails to move all family and possessions within fourteen (14) days an eviction notice may be issued and Resident may be subject to eviction proceedings. Exception: **Abbie Lane, Village Oaks or Fourteen Pines** Residents who fail to transfer to the appropriate size unit may remain in the project and pay the HUD approved market rent; or move within 30 days after the

Agency notifies him/her that a unit of the required size is available within the Abbie Lane, Village Oaks, or Fourteen Pines complexes.

- M. The Resident will leave their present dwelling in a good and clean condition and will be responsible for any expenses the Agency might incur on the Resident's behalf in cleaning and/or repairing the dwelling beyond normal wear and tear after the Resident has vacated
- N. If a Resident family, who is required to move because of the need to change unit size, rejects the offer of a suitable unit in the Public Housing program, or fails to move within fourteen (14) days, that family may be subject to eviction proceeding by the Agency.
- O. At a Resident's request, the Agency may allow the resident to transfer to another Public Housing unit owned by the Agency if the Agency can determine that extreme or unusual, or emergency conditions exist to justify the transfer, and it can be determined to be in the best interests of the Agency.
- P. Scattered Site Preference. In filling scattered site vacancies first preference will be given to current Residents if they meet the following criteria:
  - 1. Have lived in a Low Rent Public Housing Duplex or townhouse (excluding scattered site units) for at least 18 months, and
  - 2. Have a documented record of meeting their rental responsibilities in the last 2 years, and
  - 3. Have had no substantial complaints regarding disturbance of neighbors for the last 2 years, and
  - 4. Have a satisfactory record of maintaining their unit and its surrounding area for the last 2 years, and
  - 5. Meet the terms of Section XIV H, I, and J of the Statement of Policy.
  - 6. Residents in Public Housing multifamily projects shall be notified of the scattered site selection preference policy. Those families wishing to transfer to Scattered Sites may apply to the Division Director or designate. Upon determination that the preference criteria have been met the transfer request shall be sent to Intake for assignment to an appropriate sized unit. **In the event that a substantial period of time elapses between application for the Incentive Transfer Program and offer of a unit, the Housing Authority may re-evaluate all minimum criteria for program approval.**

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7. A criminal history background check will be completed prior to offering an applicant a scattered site unit.
8. In the event a unit becomes available at a Scattered Site and there are no qualified residents waiting to transfer to a Scattered Site, the Agency may, at its discretion, select an eligible applicant from the Public Housing Waiting List.

**SECTION XV. RE-EXAMINATION OF FAMILY INCOME, COMPOSITION, AND EXTENT OF EXCEPTIONAL MEDICAL OR OTHER UNUSUAL EXPENSES**

- A. **Regular Examination.** Re-examination of Family income, composition, and the extent of medical or other unusual expenses incurred by the Family shall be made at least annually and appropriate redetermination shall be made of the amount of Total Tenant Payment and the amount of the housing assistance payment.
- B. **Interim Re-Examination.** When a Family can show a change in its circumstances, such as a decline in net income, between admission and first regular re-examination or between regular re-examinations, or such other circumstances as shall create a hardship situation, its Total Tenant Payment shall be reviewed and adjusted as follows:
  1. The reduced net income of the Family must be verified and the Total Tenant Payment reduced accordingly. Such decline in income must be of a continuing nature and have lasted for 30 days or more. **A Resident cannot request an interim adjustment until after the thirty-day hardship period has been completed. After the hardship period, the resident may request an interim readjustment to their rent. It is the resident's responsibility to provide the Housing Authority with verification of the decrease in income. If verification is received by the 25<sup>th</sup> of the month, after completion of the hardship period, the resident's rent will decrease effective the first of the following month.**
  2. The Family shall be required to report any further upward changes in their income until the next regular re-examination is held.
  3. The Total Tenant Payment shall be increased accordingly if the net income of the Family increases during this period.
  4. The Family shall be notified in writing of all such adjustments, and a fully documented record of all circumstances and decisions included in the Resident's file.

5. Residents must report increase in gross income in accordance with their lease agreement.
- C. Change in Family Composition. All changes in Family composition must be immediately reported to the Agency. **The resident must obtain the permission of the Housing Authority prior to allowing anyone not listed on the Lease Agreement to move into the unit.**
1. If another person(s) becomes a member of the Family or a family member leaves the household, verification of family composition and a re-examination of the total Family income will be completed and the Total Tenant Payment will be adjusted accordingly. Management reserves the right to disapprove the addition of any member to a family if such an addition requires a family to move to a larger unit.
  2. **Any adult being added to the household will be required to complete the entire intake process, including rental reference checks and a criminal history background check. The Housing Authority retains the right to deny admission based upon the criteria outlined in this policy.**
  3. If the change in Family composition results in the need to change dwelling size, the procedures outlined in Section XIV (Transfer of Tenants) will be followed.
- D. Computational or Clerical Error. In case of an error in the computation of Total Tenant Payment or a correction to the Total Tenant Payment due to incorrect Utility Allowance Credit, an appropriate adjustment shall be made as stipulated in paragraph G of this section. The Family shall be notified in writing of all such adjustments, and a fully documented record of all circumstances shall be included in tenant's file.
- E. Verification and Documentation of Data. Re-examination data is to be verified and documented in accordance with Section XII. C, of these policies.
- F. Tenant Responsibility for Providing Information. All tenants must complete required forms promptly and supply requested information that is complete and accurate. Failure or refusal to complete required forms or supply requested information is grounds for eviction.

G. Rent Adjustments.

1. There shall be no adjustments in the Total Tenant Payment, between admission and first regular re-examination or between regular re-examinations except as specified in subsections B, C, and D, of this Section.
2. All adjustments are to take effect as follows:
  - a. **In the event of a decrease in the Total Tenant Payment, the adjustment is to take effect on the first day of the month following that in which the completion of the hardship period is reported. Verification of the decrease in income must be received by the 25<sup>th</sup> of the month, after completion of the hardship period, in order for the rent to decrease, effective the 1<sup>st</sup> of the following month.**
  - b. In the event of an increase in the Total Tenant Payment, the adjustment is to take effect on the first day of the second month following the date the redetermination has been completed. In the case of a regularly scheduled redetermination, the increase will be effective on the scheduled anniversary date.
  - c. In the event of computational or clerical error, any decrease in the Family rent payment shall be retroactive to the effective date of the change. In the case of an upward change in the Family rent payment, the Family shall be given 30 days written notice of the increase.
  - d. **If the Resident or a family member has misrepresented the facts upon which rent has been based or eligibility has been determined, the Housing Authority may increase the rent retroactive to the appropriate date. The Housing Authority may require that the retroactive amount due be paid within 14 days of notice. Misrepresentation or providing false information is a serious violation of the lease. The Housing Authority may also terminate the Resident's lease with no opportunity to remedy the violation.**
3. Official notice of Rent Adjustment. The Agency's official notice to the resident of a change in the monthly rent will be mailed by first class mail in a timely manner in accordance with applicable state law and federal regulations. The official notice letter, on Agency letterhead, will contain the

statement of the re-examination completed, the verified income included in the change, the new rent amount, the effective date of the change and other information pertinent to the change. An appropriate lease renewal or lease rider (Section XI, G) will be included with this notice. The Resident may request an explanation of the specific information used for the determination and if the Resident disagrees with the information, Resident may request an Informal Hearing according to the Statement of Policy.

### **SECTION XVI. OVER INCOME TENANTS**

This Agency shall continue to renew the lease without regard to the income of the tenant family, unless: the Agency has identified, for possible rental by the Resident family, a decent, safe and sanitary unit of suitable size available at a rent not exceeding the Resident family's Total Tenant Payment as determined according to Section XII of this policy.

### **SECTION XVII. PET POLICY**

- A. An Elderly Family (Section XXI) and any resident family residing in housing designated for elderly or substantially altered to accommodate a person with a disability may keep and maintain a pet provided the following conditions are met to the satisfaction of the Agency:
1. A pet will be limited to one (1) cat or one (1) dog per household.
  2. Documentation from a licensed Veterinarian will be provided for: 1) a current rabies inoculation, and 2) the spaying or neutering of the animal, as appropriate.
  3. Verification of current license will be provided for a dog (or cat, if required) from the appropriate authority. Current licensing will be rechecked annually.
  4. A refundable pet deposit in the amount of **\$100** will be made to the Agency.
  5. An Addendum to Lease Agreement: Pet Permit will be agreed to and signed with the Agency.
- B. A pet will be considered unauthorized and the resident subject to eviction proceeding(s), if the Agency Pet Permit requirements have not been completed with an authorized Agency staff person.

- C. This policy does not apply to non-elderly resident families residing in family housing or to elderly/disabled resident families residing in unaltered units or in housing not designated for elderly. Non-elderly resident families found to have an animal pet in their possession will be subject to eviction proceedings.

#### **SECTION XVIII. WAIVER FOR SEASONAL TASKS POLICY**

Elderly or disabled families that live in units where seasonal tasks are required as part of the lease agreement and who request an exemption from the seasonal tasks will be required to furnish documentation as to why they would be unable to perform these tasks. Such documentation shall include a detailed statement from an attending physician or medical practitioner documenting to the satisfaction of this agency the reasons such an exemption should be granted. Each request for the exemption will be judged on an individual basis and shall not set a standard for any other request.

#### **SECTION XIX. FRAUD AND MISREPRESENTATION OF INCOME**

- A. This Agency shall maintain a careful scrutiny of resident and applicant responsibilities to ensure the proper use of the program by the residents and applicants. This shall include: written notices to all residents and applicants regarding their various responsibilities at such times as may be deemed necessary; careful explanation and monitoring of lease responsibilities; and careful assessment of Family income and composition.
- B. If the Agency has reason to believe there is program abuse, the Agency shall:
1. Make an initial assessment of the allegation;
  2. Take the necessary administrative action to correct the determined abuse which may include, but is not limited to: taking corrective action as described by the Agency, the recovery of underpaid rent, the denial of assistance, or eviction;
  3. Seek relief under state or local law;
  4. Refer the case to the appropriate office of HUD for investigation, administrative sanctions and possible criminal prosecution; and/or
  5. Refer the case to a collection agency for collection of any amounts owed to the Agency as a result of fraud or misrepresentation.

- C. Employee Fraud. If there is sufficient evidence to suspect that an employee has willfully participated in fraudulent activities connected with the Public Housing Program, the Agency may suspend the employee for between five and thirty days. Following the suspension the Agency would take appropriate disciplinary action as determined by the Agency's Personnel Policy and its existing Labor Contract with the employees' union.

#### **SECTION XX. GRIEVANCE PROCEDURES**

- A. Inapplicability of Section 8 Housing Assistance Payments Program Hearing and Review Procedures. The Informal Hearing and review procedures established by this Agency for its Section 8 Housing Assistance Payments program are not applicable to the Low Rent Public Housing Program.
- B. The Appeal Process for Applicants section of these policies contains the procedure for resolving applicant eligibility grievances.
- C. The Grievance Procedure for Tenants section of these policies is adopted by the Agency to resolve disputes and complaints of Tenants.

#### **SECTION XXI. DEFINITION OF TERMS**

- A. Assets. Net Family Assets include the value of equity in real property, savings, stocks, bonds, and other forms of capital investment. The value of necessary items such as furniture and automobiles is to be excluded.
- B. Dependent. A member of the Family household (excluding foster children) other than Family head or spouse, who is under 18 years of age or is a person with a disability, or is a Full-time student.
- C. Dilapidated. A housing unit that does not provide safe and adequate shelter, and in its present condition endangers the health, safety or well being of a family or it has one or more critical defects or a combination of defects requiring considerable repair or rebuilding.
- D. Disability (Person with a). The definition of a Person with a Disability includes a person who meets any one of the following criteria:
1. Has a physical, mental, or emotional impairment that:
    - a. Is expected to be of long-continued and indefinite duration;
    - b. Substantially impedes his or her ability to live independently,

and; BOOK 159 PAGE 1336

- C. Is of such a nature that ability to live independently could be improved by more suitable housing conditions.
2. Has a disability as defined in Sec. 223 of the Social Security Act (42 U.S.C. 423):

"Inability to engage in any substantial, gainful activity by reason of any medically determinable physical or mental impairment which can be expected to result in death or which has lasted or can be expected to last for a continuous period of not less than 12 months," or

"In the case of an individual who attained the age of 55 and is blind and unable by reason of such blindness to engage in substantial, gainful activity requiring skills or ability comparable to those of any gainful activity in which he has previously engaged with some regularity and over a substantial period of time."

[NOTE: Receipt of veteran's disability benefits does not automatically qualify a person as disabled under this definition, because the Veterans Administration and Social Security Administration define disability differently. Applicants who meet Social Security's definition of a Person with a Disability are considered disabled, even if they do not receive Social Security benefits.]

3. Has a developmental disability as defined in Section 102(7) of the Developmental Disabilities Assistance and Bill of Rights Act (42 U.S.C. 6001(7)):

"Severe chronic disability that: (a) is attributable to a mental or physical impairment or combination of mental and physical impairments; (b) is manifested before the person attains age 22; (c) is likely to continue indefinitely; (d) results in substantial functional limitation in three or more of the following areas of major life activity: (1) self-care, (2) receptive and responsive language, (3) learning, (4) mobility, (5) self-direction, (6) capacity for independent living, and (7) economic self-sufficiency; and (3) reflects the person's needs for a combination and sequence of special, interdisciplinary, or generic care, treatment, or other services which are of lifelong or extended duration and are individually planned and coordinated."

- E. Displaced Person. A person displaced by governmental action, or a person whose dwelling has been extensively damaged to the extent it is uninhabitable and that is verifiable by a unit of government.
- F. Expenses.
1. Medical Expenses. Those medical expenses, including medical insurance premiums, which are to be anticipated during the period for which the annual income is computed, and which are not covered by insurance or other reimbursement.
  2. Childcare Expenses. Amounts paid by the Family for the care of children under 13 years of age during the period for which the annual income is computed, but only where such care is necessary to enable a Family member to be gainfully employed or to further his or her education, and only to the extent such amounts are not reimbursed. In the case of child care necessary for employment, the amount deducted shall not exceed the amount received from such employment.
  3. Disability Assistance Expenses. Amounts paid by the family for care attendants and/or auxiliary apparatus for a family member with a disability that are necessary to enable a family member (including the family member with a disability) to be employed, provided these amounts are not paid to a family member or reimbursed by an outside source.
- G. Family (for Eligibility). Two or more persons sharing residency whose income and resources are available to meet the Family's needs and who are either related by blood, marriage, or operation of law, or have evidenced a stable Family relationship.
1. A stable Family relationship may be established by two persons who have:
    - a. A co-mingling of assets, both physical (such as furniture, automobiles, or other property) and/or monetary (such as bank accounts, credit cards or other) for which evidence can be shown; or
    - b. A child in common.
  2. Elderly Family. A family whose head, or spouse, or whose sole member is:
    - a. At least 62 years of age; or

- b. **Meets the definition of a Person with a disability as defined in Section 223 of the Social Security Act or in Section 102(7) of the Developmental Disabilities Assistance and Bill of Rights Act.**
  - c. **Is determined, pursuant to regulations issued by HUD, to have an impairment which:**
    - i. **is expected to be of long-continued and indefinite duration;**
    - ii. **substantially impedes his or her ability to live independently; and**
    - iii. **is of such a nature that ability to live independently could be improved by more suitable housing conditions; or**
  - d. **Two or more persons, each of whom is either at least 62 years of age, or has a disability and are living together; or**
  - e. **One or more persons who are either at least 62 years of age, has a disability, living with one or more live-in aides.**
3. **Single individuals with no other children who are pregnant or in the process of securing legal custody of any individuals under the age of 18. Should the pregnant individuals abort or miscarry prior to initial placement, she will no longer qualify as an eligible family.**
  4. **A person who is the remaining member of a resident Family.**
  5. **Lower-Income Family. A Family whose income does not exceed 80 percent of the median income for the area as determined by HUD.**
  6. **Very Low-Income Family. A Family whose income does not exceed 50 percent of the median income for the area as determined by HUD.**
- H. **Federal Preferences. A statutory directive that required the Housing Authority in selecting applicants for housing assistance to give "preference to families which occupy substandard housing or are involuntarily displaced at the time they are seeking housing assistance or are paying more than 50 percent of family income for rent." An amendment to the rule permits the 10 percent exception.**

- I. Full-Time Student. A person who is carrying a subject load that is considered full-time for day students under the standards and practices of the educational institution attended. An educational institution includes a vocational school with a diploma or certificate program, as well as an institution offering a college degree.
- J. Handicap (Person with a): **The Rehabilitation Act of 1973, as amended, substitutes the word "disabled" or "disability" for the original word used - "handicapped" or "handicap". Therefore, the word "disabled" (see Section XXI.D.) is also used to define "handicapped."**
- K. Head of Household. A Family shall have only one person designated as Head of Household. That person shall be the Family member who:
1. has the majority custodial responsibility for the minor dependent(s) or adult dependent(s) (including foster children); or
  2. has the direct responsibility for providing the basic needs of the Family; or
  3. has been designated as such, in writing (by mutual agreement or by legal document); or
  4. is the sole member of the Family.
- L. HUD. The Department of Housing and Urban Development or its designee.
- M. Income.
1. Annual Income. The anticipated total annual income of an eligible Family from all sources for the 12-month period following the date of determination of income, computed in accordance with HUD regulations.
  2. Annual Income After Allowances. The annual income less:
    - a. \$480 for each dependent;
    - b. \$400 for any Elderly Family;
    - c. Medical expenses in excess of three percent of the annual income for any Elderly Family, and
    - d. Disability Assistance Expenses, and

- e. Childcare expenses.
3. Monthly Income. One-twelfth of the annual income.
- N. Lease. The written agreement between the Agency and an eligible resident family for the leasing of a dwelling unit in the Low Income Housing Program, and which agreement is in compliance with HUD regulations.
- O. Limited Denial of Participation. Applicants whom HUD has denied participation in subsidized housing programs for a specified period of time.
- P. Live-in Aide. A person who resides with an elderly or disabled person(s) and who: (a) is determined by the Agency to be essential to the care and well being of the person(s); (b) is not obligated for the support of the person(s); and (c) would not be living in the unit except to provide necessary supportive services.
- Q. Public Assistance. Welfare or other payments to families or individuals, based on need, which are made under programs funded, separately or jointly, by Federal, State, or local governments.
- R. Single Person. "Single Person" means a person living alone or intending to live alone and who does not qualify as an Elderly Family, a Disabled Person, or a Displaced Person as defined above or as a remaining member of a tenant family.
- S. Standard, Permanent Replacement Housing. Housing that is: (1) decent, safe and sanitary; (2) adequate for the family size; and (3) being occupied by the family pursuant to a lease or occupancy agreement. It does not include transient facilities, or temporary shelters or the facility in which an applicant and the applicant's spouse or household member, who engages in domestic violence, live.
- T. Tenant Rent. The amount payable monthly by the Family to the Agency.
- 1. Where all utilities (except telephone and cable) and other essential housing services are supplied by the Agency, Tenant Rent equals Total Tenant Payment.
  - 2. Where some of the utilities (except telephone) and other essential housing services are not supplied by the Agency and their cost is not included in the amount paid for rent, Tenant Rent equals Total Tenant Payment less the Utility Allowance.
- U. Total Tenant Payment. The monthly amount calculated in accordance with Section XII.

## Why should this program exist?

- Housing funding is competitive — communities which have an operating FSS program are better able to compete for additional housing dollars.
- In Lane County, 8.5% of the families and 12.8% of the population live below the poverty line.
- There are over 4,000 families on the Section 8 waiting list.

## What are the benefits to the FSS participants?

- The FSS Program can help to break the welfare cycle — children learn new skills as they witness their parents achieve self-sufficiency.
- It helps families to develop a sense of pride and accomplishment.

## Why should our community invest in it?

- It is a program that empowers families to reach for and realize their goals.
- It is a program that gets families off public assistance and housing subsidies.

### **For More Information**

Family Self-Sufficiency Program  
Housing Authority and Community  
Service Agency  
177 Day Island Road  
Eugene, Oregon 97401  
(503) 687-3755



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of Public and Private  
Organizations*

# FSS - HELPING FAMILIES SUCCEED

## What is the FSS Program?

Section 8 Families can leave the welfare system or low paying jobs, and achieve economic self-sufficiency through a bold, new HUD program, Family Self-Sufficiency (FSS).

Housing Assistance is the stabilizing force that enables families to invest their energies in other efforts, such as employment and education. Families, with the help of FSS staff, identify goals as well as barriers. Together, FSS and families formulate a plan of goals and services needed to reach self-sufficiency.

HUD sets up an escrow account for each participating FSS family. As the family's income increases, HUD matches a portion of the increases in participant's income to the account.

When goals are reached, and FSS families are not receiving any welfare assistance, they are entitled to the money in the escrow account.

## Community Partnership

Twenty-five local non-profit agencies have joined together as the Program Coordinating Committee to make the FSS program a reality.

Under the leadership of the Housing Authority, each agency brings their individual effort, expertise and commitment to help clients remove roadblocks to economic self-sufficiency.

The Program Coordinating Committee needs your participation to make this program a success. Please join us. For more information, contact the Family Services Coordinator, 687-3755.

## Community Benefits

The direct economic impact is approximately \$200,000 annually. New federal dollars will be channeled into the community through rental subsidies and escrow payments.

Family stability decreases social problems, decreases reliance of individuals on public assistance, and adds new revenue to the tax base.

## What Can I Do To Help?

Examples of needed services:

- Literacy Training*
- Parenting Skills*
- Financial Counseling*
- Transportation*
- Job Training*
- Living Wage Employment*

Examples of needed donations:

- Free/Low Cost Auto Repair*
- Tool Donations*
- Tax Preparations*
- Free/Low Cost Day Care*
- Work Apparel*
- Haircuts*

*With the help of community members and organizations, FSS families will succeed.*

**FSS INFORMATION  
REQUEST FORM**

I am interested in finding out more about the FSS Program. Please schedule me for an Information Session:

Name: \_\_\_\_\_

Mailing Address: \_\_\_\_\_

Phone Number: \_\_\_\_\_

I am a participant in the:

- Public Housing Program
- Section 8 Program

I would prefer to attend an Information Session in the:

- Morning
- Evening

Return this form to either of the HACSA offices:

HACSA  
177 Day Island Rd  
Eugene OR 97401

HACSA  
300 W Fairview Dr  
Springfield OR 97477

If your address changes or if you will need the Housing Authority to provide an interpreter or translator for you please call Sandi Sander at 682-2539.

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**FOR MORE INFORMATION  
CONTACT**

Sandi Sanders  
Family Self-Sufficiency Program  
Housing Authority and Community  
Services Agency of Lane County  
177 Day Island Road  
Eugene OR 97401  
(541)682-2539

**THE FAMILY  
SELF-SUFFICIENCY  
PROGRAM**



- OPPORTUNITY.....
- MONEY.....
- CHOICE.....
- CHANGE.....
- SUPPORT.....
- FREEDOM.....



# THE FAMILY SELF-SUFFICIENCY PROGRAM CAN ASSIST YOU TO IMPROVE THE QUALITY OF LIFE FOR YOUR FAMILY

What is the Family

Self-Sufficiency (FSS) Program?

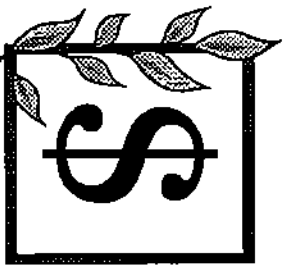
FSS is a *voluntary* program for residents of the Housing Authority's Section 8 and Public Housing Programs.

It is an *opportunity* to improve your financial situation.

1345 A program that puts *cash* into a savings account for your family.

1349 PAGE It can help you if you are unemployed, going to school or are already employed, but want to raise your income.

FSS Case managers will provide you with the *guidance and support* necessary for you to create long term plans for employment or training.



Is the FSS Program  
right for my family?

Do you want to save money for the future?

Do you want to become free of government assistance programs?

Are you willing to make a commitment for change in your life?

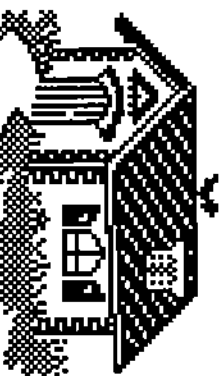
Are you willing and able to work?

*If you answered yes to all of these questions then the FSS Program may be for you.*

**How do I get involved  
In the FSS Program?**

Space is limited so don't miss this opportunity. Return the back of this form and you will be notified by mail of the next FSS Information meeting, or call Sandi Sanders, the FSS Coordinator at 682-2539 for additional information.

Benefits of participating  
In the FSS Program



HACSA opens an interest bearing savings account for FSS Participants who are successful in finding and maintaining employment. Money from HUD goes into this account.

FSS staff will assist your family to identify, locate and arrange for the services you need to reach self-sufficiency.

- Development of resumes
- Money management
- Counseling
- Parenting skills
- Education or training

The possibility of home ownership.