



Improving the Quality of Life of Families and Strengthen Communities

Housing Authority of Maricopa County  
Annual Plan (HCV Only PHA)  
July 2024- June 2025

8910 N. 78<sup>th</sup> Ave.  
Peoria, Arizona 85345

<b>Streamlined Annual PHA Plan (HCV Only PHAs)</b>	U.S. Department of Housing and Urban Development Office of Public and Indian Housing  <b>FINAL</b>	OMB No. 2577-0226 Expires 03/31/2024
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**Purpose.** The 5-Year and Annual PHA Plans provide a ready source for interested parties to locate basic PHA policies, rules, and requirements concerning the PHA’s operations, programs, and services, including changes to these policies, and informs HUD, families served by the PHA, and members of the public of the PHA’s mission, goals and objectives for serving the needs of low- income, very low- income, and extremely low- income families

**Applicability.** The Form HUD-50075-HCV is to be completed annually by **HCV-Only PHAs**. PHAs that meet the definition of a Standard PHA, Troubled PHA, High Performer PHA, Small PHA, or Qualified PHA do not need to submit this form. Where applicable, separate Annual PHA Plan forms are available for each of these types of PHAs.

**Definitions.**

- (1) **High-Performer PHA** – A PHA that owns or manages more than 550 combined public housing units and housing choice vouchers, and was designated as a high performer on both the most recent Public Housing Assessment System (PHAS) and Section Eight Management Assessment Program (SEMAP) assessments if administering both programs, or PHAS if only administering public housing.
- (2) **Small PHA** - A PHA that is not designated as PHAS or SEMAP troubled, that owns or manages less than 250 public housing units and any number of vouchers where the total combined units exceed 550.
- (3) **Housing Choice Voucher (HCV) Only PHA** - A PHA that administers more than 550 HCVs, was not designated as troubled in its most recent SEMAP assessment and does not own or manage public housing.
- (4) **Standard PHA** - A PHA that owns or manages 250 or more public housing units and any number of vouchers where the total combined units exceed 550, and that was designated as a standard performer in the most recent PHAS and SEMAP assessments.
- (5) **Troubled PHA** - A PHA that achieves an overall PHAS or SEMAP score of less than 60 percent.
- (6) **Qualified PHA** - A PHA with 550 or fewer public housing dwelling units and/or housing choice vouchers combined and is not PHAS or SEMAP troubled.

<b>A.</b>	<b>PHA Information.</b>			
<b>A.1</b>	<b>PHA Name:</b> Housing Authority of Maricopa County		<b>PHA Code:</b> AZ009	
	<b>PHA Plan for Fiscal Year Beginning:</b> (MM/YYYY): 07/2024			
	<b>PHA Inventory</b> (Based on Annual Contributions Contract (ACC) units at time of FY beginning, above) 1,862 (53 RAD, 200 PBVs, 59 Mainstream, 29 FUP, 5 VASH, and 89 EHV).			
	<b>Number of Housing Choice Vouchers (HCVs)</b> 1,461			
	<b>PHA Plan Submission Type:</b> <input checked="" type="checkbox"/> Annual Submission <input type="checkbox"/> Revised Annual Submission			
	<b>Availability of Information.</b> In addition to the items listed in this form, PHAs must have the elements listed below readily available to the public. A PHA must identify the specific location(s) where the proposed PHA Plan, PHA Plan Elements, and all information relevant to the public hearing and proposed PHA Plan are available for inspection by the public. Additionally, the PHA must provide information on how the public may reasonably obtain additional information of the PHA policies contained in the standard Annual Plan but excluded from their streamlined submissions. At a minimum, PHAs must post PHA Plans, including updates, at the main office or central office of the PHA. PHAs are strongly encouraged to post complete PHA Plans on their official website.			
	The draft annual plan may be reviewed at <a href="http://maricopahousing.org">maricopahousing.org</a> or at any of the following locations: <ul style="list-style-type: none"> <li>▪ Housing Authority of Maricopa County Administrative Office, 8910 N. 78th Avenue, Peoria AZ 85345</li> <li>▪ Rose Terrace Leasing Office, 525 E. Harrison Drive, Avondale AZ 85323</li> <li>▪ Casa Bonitas Leasing Office, 12976 W. Cottonwood, Surprise AZ 85378</li> <li>▪ River at Eastline Leasing Office, 2106 E. Apache Blvd, Tempe AZ 85281</li> <li>▪ Heritage at Surprise Leasing Office, 12669 W Rimrock St. Surprise, AZ 85374</li> </ul>			
	<input type="checkbox"/> <b>PHA Consortia:</b> (Check box if submitting a joint Plan and complete table below)			
	<b>Participating PHAs</b>	<b>PHA Code</b>	<b>Program(s) in the Consortia</b>	<b>Program(s) not in the Consortia</b>
	Lead HA:			
<b>B.</b>	<b>Plan Elements.</b>			

**B.1 Revision of Existing PHA Plan Elements.**

a) Have the following PHA Plan elements been revised by the PHA since its last Annual Plan submission?

Y N

- Statement of Housing Needs and Strategy for Addressing Housing Needs.
- Deconcentration and Other Policies that Govern Eligibility, Selection, and Admissions.
- Financial Resources.
- Rent Determination.
- Operation and Management.
- Informal Review and Hearing Procedures.
- Homeownership Programs.
- Self Sufficiency Programs and Treatment of Income Changes Resulting from Welfare Program Requirements.
- Substantial Deviation.
- Significant Amendment/Modification.

(b) If the PHA answered yes for any element, describe the revisions for each element(s):

**Deconcentration and Other Policies that Govern Eligibility, Selection, and Admissions**

The Housing Authority of Maricopa County (HAMC) revised its Administrative Plan, which governs the administration of the Housing Choice Voucher (HCV) and other Voucher programs. The following sections and subject matters were revised to comply with HUD policy:

Chapter and Section	Subject
3.2, 3.9, 3.12, 4.8, 7.3, 11.2, 12.1, 13.7, 14.6, 15.3	10 calendar days versus 10-business days consistency to reporting deadline as allowable by HUD
4.2	Pre-Application
4.4	Waiting list placement
4.5	Waiting list selection
4.6	Updating the Waiting List
4.8	Reporting Changes to Family Circumstances
7.3	Exceptions to Subsidy Standards
7.5	Single Room Occupancy (SRO)
7.6	SRO Payment Standard, Utility Allowance and HAP Calculation
7.7	SRO Housing Quality Standards (HQS)
7.8	Congregate Housing
7.9	Congregate Housing Payment Standard, Utility Allowance and HAP Calculation
7.10	Congregate Housing Quality Standards (HQS)
7.11	Group Home
7.12	Group Home Payment Standard, Utility Allowance and HAP Calculation
7.13	Group Home Housing Quality Standards (HQS)
7.14	Shared Housing
7.15	Shared Housing Payment Standard, Utility Allowance and HAP Calculation
7.16	Shared Housing Housing Quality Standards (HQS)
7.17	Cooperative Housing
7.18	Cooperative Housing Payment Standard, Utility Allowance and HAP Calculation
7.19	Cooperative Housing Housing Quality Standards (HQS)
7.20	Manufactured Home
7.21	Special Policy for Manufactured Homes Owners Who Lease A Space
7.22	Manufactured Home Payment Standard, Utility Allowance and HAP Calculation
7.23	Manufactured Home Housing Quality Standards (HQS)
19.3	Eligibility for PBV Assistance

**National Standards for the Physical Inspection of Real Estate (NSPIRE) Update**

The HAMC has provided HUD notification of its intent to continue to use Housing Quality Standards (HQS) inspection protocol for Voucher programs until it is able to fully implement NSPIRE on October 1, 2024.

**HOTMA Changes**

PHAs are required by HUD to update their HCV Administrative Plans to reflect the many program changes brought about by the Housing Opportunity Through Modernization Act of 2016 (HOTMA) sections 102, 103, and 104. HOTMA Policy Changes are not effective until the PHA’s compliance date. Owners of HUD Multi-family properties are also required to change their tenant selection plan to reflect applicable HOTMA rules and discretionary decisions.

HUD is in the process of replacing PIC with the Housing Information Portal (HIP), PHAs cannot transition to HOTMA until the HIP system is operational and accepting certifications.

The HAMC plans to use November 1, 2024, as its compliance date. All transactions effective on this compliance date will be processed using HOTMA policies listed below:

Subject	Discretion	Change Summary
<b>Asset Limitation</b> <small>104</small>	Yes	Restriction on the eligibility of a family to receive assistance if the family owns real property that is suitable for occupancy by the family as a residence or has assets in excess of \$100,000, as adjusted annually. PHAs/MFH Owners are given discretion at reexamination in enforcing the asset limitation on eligibility for assistance.
<b>Calculating Income</b>	No	When calculating a household’s income, including asset income, at the time of admission to the program or during interim reexaminations, PHAs/MFH Owners must use anticipated income (current income) (i.e., the family’s estimated income for the upcoming 12-month period)
	Yes	During annual reexamination, PHAs/MFH Owners have the option of using a “safe harbor” income verification from another federal mean-tested program to verify gross annual income.
	No	Applying the Current SSA COLA at Next Annual and Interim Reexamination, PHAs/MFH Owners are required to factor in the COLA when determining SS and SSI annual income for all annual reexaminations and interim reexaminations of family income that have not yet been completed and will be effective January 1 or later of the upcoming year
	No	PHAs/MFH Owners must revise their Administrative Plans and Tenant Selection Plans, as applicable, to reflect how they will repay or credit a family the amount they were overcharged as a result of the PHA/MFH Owner’s de minimis error in income determination
<b>Deductions/ Expenses</b>	No	Effective January 1, 2024, the dependent deduction amount is \$480. This amount will be adjusted and applies to a family’s next annual or interim reexamination after the annual adjustment, whichever is sooner. HUD will publish the CPI–W adjusted dependent deduction annually. PHAs/MFH Owners must implement the adjusted dependent deduction for all income examinations that are effective on January 1 or later.
	No	Effective January 1, 2024, the elderly/disabled family deduction increases from \$400 to \$525 and applies to a family’s next interim or annual reexamination, whichever is sooner. The amount of the deduction will be adjusted annually using the HUD published CPI-W. PHAs/MFH Owners must implement the adjusted dependent deduction for all income examinations that are effective on January 1 or later.
	No	New Higher Threshold for Deducting Health and Medical Care Expenses and Unreimbursed Reasonable Attendant Care and Auxiliary Apparatus Expenses. The threshold to deduct health and medical care expenses and reasonable attendant care and auxiliary apparatus expenses has been increased from an excess of 3 to an excess of 10 percent of annual income.
	No	New Definition of Unreimbursed Health and Medical Care Expenses and Reasonable Attendant Care and Auxiliary Apparatus Expenses Deduction. Health and medical care expenses, include costs incurred for the diagnosis, cure, mitigation, treatment, or prevention of disease or payments for treatments affecting any structure or function of the body but only if they are eligible and not otherwise reimbursed for elderly or disabled families.
	No	Unreimbursed Reasonable Attendant Care and Auxiliary Apparatus Expenses. In order to claim the deduction for the cost of unreimbursed reasonable attendant care and auxiliary apparatus expenses, the family must include a person with a disability, and the expenses must enable any member of the family (including the member who is a person with a disability) to be employed. If the unreimbursed reasonable attendant care and auxiliary apparatus expense exceeds the amount earned by the person who was enabled to work, the deduction will be capped at the amount earned by that individual

Subject	Discretion	Change Summary
<b>Deductions/ Expenses (cont.)</b>	Yes	Hardship Exemptions for Health and Medical Care Expenses and Reasonable Attendant Care and Auxiliary Apparatus Expenses. HOTMA changes provide financial hardship exemptions, through one of two categories; phased-in relief or general relief, for unreimbursed health and medical care expenses, and for reasonable attendant care and auxiliary apparatus expenses for eligible families. Phase-in relief (24-months) at 5%, 7.5% and 10% eligible expense deduction of annual income every 12 months. General relief, the family will receive a deduction for the sum of the eligible expenses that exceed 5 percent of annual income and will conclude when the circumstances that made the family eligible for the relief are no longer applicable or after 90 days, whichever comes earlier.
	Yes	Child-Care Expenses Deduction and Hardship Exemption to Continue Child-Care Expenses Deduction. A family whose eligibility for the child-care expense deduction is ending may receive a hardship exemption to continue receiving a child-care expense deduction in certain circumstances, for a maximum of 180 days, including extensions, when the family no longer has a member that is working, looking for work, or seeking to further their education, and the deduction is necessary because the family is unable to pay their rent
	Yes	Hardship Requirements for Determination of the Family's inability to Pay Rent
	No	Family Notification of Hardship Exemption availability & term dates for approved exemptions.
	No	Family Notification of Hardship Exemption Termination & 30 day notice of rent increase
	Yes	Extension of Hardship Exemption for Additional 90-Day Period(s), if hardship continues and obtain 3 <sup>rd</sup> party verification prior to the end of the 90-day period.
	Yes	HAMC will not have additional permissive deductions
<b>Household Composition</b>	No	Definition of family to also include a single person who: <ul style="list-style-type: none"> <li>• Is an otherwise eligible youth who has attained at least 18 years of age and not more than 24 years of age;</li> <li>• Has left foster care, or will leave foster care within 90 days, in accordance with a transition plan</li> <li>• Is homeless or is at risk of becoming homeless at age 16 or older.</li> </ul>
	No	New Definitions of Foster Adult and Foster Child. State-level agencies define who is considered a foster adult/child. In general, a foster adult is unable to live independently due to a debilitating physical or mental condition and is placed with the family by an authorized placement agency or by judgment, decree, or other order of any court of competent jurisdiction. A foster child is defined as a member of the household who meets the definition of a foster child under state law. In general, a foster child is placed with the family by an authorized placement agency (e.g., public child welfare agency) or by judgment, decree, or other order of any court of competent jurisdiction. Foster adults/children <u>are not considered family members</u> and must not be included in calculations of income for eligibility and rent determination purposes. However, foster adults/children <u>are considered household members</u> and must be included when determining unit size or subsidy standards based on established policies.
<b>Income</b>	No	Annual income includes "all amounts received," not the amount that a family may be legally entitled to receive but which they do not receive.  Annual income also includes all actual anticipated income from assets even if the asset is excluded from net family assets but the income from the asset is not otherwise excluded
	No	Definition of Earned Income
	No	Definition of Day Laborer
	No	Definition of Independent Contractor
	No	Definition of Seasonal Worker
	No	Definition of Unearned Income
	No	Determining Net Family Assets
	No	Exclusions from Net Family Assets
	No	Necessary and Non-Necessary Personal Property
	No	Definition of Trusts and Value
	No	Requirement to use the HUD-published passbook rate
	No	Actual and Imputed Income from Assets
	Yes	Self-Certification of Net Family Assets Equal to or Less Than \$50,000 must be fully verified every three years.

Subject	Discretion	Change Summary
Income Exclusions	No	Definition of nonrecurring Income
	No	Adoption Assistance Payments in excess of \$480 per adopted child are excluded from the family's calculation of annual income. This amount will be adjusted annually in accordance with the CPI-W
	No	Other specific sources of income are excluded per HUD regulation.
	No	The Earned Income Disregard (EID) will not apply to any family who is not eligible for and already participating in the disallowance as of December 31, 2023.
Inflationary Adjustments	No	As listed above, a total of eight (8) subject matters will be adjusted using the annually required HUD inflation factor (CPI-W), which will be posted online
Interim Reexam	Yes	Decreases in Adjusted Income. PHAs must apply a 0-percent threshold and to process an interim reexamination when there is a decrease in family size attributed to the death or permanent move-out from the assisted unit of a family member during the period since the family's last reexamination that results in a decrease in adjusted income of any amount. HAMC will establish a <u>percentage threshold</u> lower than 10 percent of annual adjusted income for processing interim reexaminations due to decreases in a family's annual adjusted income.
	Yes	Increases in Adjusted Income. PHAs/MFH Owners must conduct an interim reexamination of family income when the PHA/MFH Owner becomes aware that the family's adjusted income has changed by an amount that the PHA/MFH Owner estimates will result in <u>at least an</u> increase of 10 percent or more.
	No	Non-Interim Reexamination Transactions. New action codes will need transmission to report a non-interim reexamination submission to HUD including contract rent changes (PBV rent increases) and update to payment standards that do not correspond to interim and annual changes.
	Yes	Policies for Families to Report Changes to Annual Adjusted Income or Household Composition. PHAs/MFH Owners have the discretion to develop specific reporting policies that describe which changes must be reported to the PHA/MFH Owner and the timeline for reporting the change.
	Yes	Processing Time Period for Interim Reexaminations. A "reasonable time" may vary based on the amount of time it takes to verify information, but the PHA/MFH Owner generally should conduct the interim reexamination not longer than 30 days after the PHA/MFH Owner becomes aware of changes in income.
	No	Effective Date of Interim Rent Changes. Codified long-standing guidance on when interim reexaminations are made effective
	No	Impact of Interim Reexamination Requirements on Family Self-Sufficiency (FSS) Programs. PHAs/MFH Owners may not consider any increases in earned income when estimating or calculating whether the family's adjusted income has increased unless the family has previously received an interim reduction during the same reexamination cycle. The PHA/MFH Owner may not perform an interim reexamination of annual income when enrolling a family in the FSS program unless the family experienced a change in annual adjusted income that meets the threshold.
Verification	Yes	Authorization for the Release of Information. After an applicant or participant has signed and submitted a consent form either on or after January 1, 2024 (regardless of the PHA/MFH Owner's compliance date), they do not need to sign and submit subsequent consent forms at the next interim or regularly scheduled income examination except under the following circumstances: <ul style="list-style-type: none"> <li>• When any person 18 years or older becomes a member of the family;</li> <li>• When a member of the family turns 18 years of age; and</li> <li>• As required by HUD or the PHA in administrative instruction</li> </ul>
	No	Revocation of Consent. PHAs/MFH Owners must notify their local HUD office of a family's revocation of consent and may decide whether revocation of a family's consent will result in termination of assistance or denial of admission.
	Yes	Mandated and Discretionary use of HUD's Enterprise Income Verification (EIV) System. PHAs/MFH Owners are no longer required to use EIV to verify tenant employment and income information during an interim reexamination of family composition and income. PHAs/MFH Owners are still required to use EIV in its entirety at all other times.

Subject	Discretion	Change Summary
Verification (cont.)	Yes	Determination of Income Using Other Means Tested Public Assistance (i.e., "Safe Harbor". Safe Harbor verification will be considered acceptable if the documentation meets the criteria that the income determination was made within the 12 months prior to the receipt of the verification by the PHA/MFH Owner. This satisfies all verification date requirements for Safe Harbor income determinations.
	Yes	Verification of Social Security Number (SSN). PHAs/MFH Owners must still attempt to gather third-party verification of SSN prior to admission; however, they will also have the option of accepting a self-certification and a third-party document with the applicant's name printed on It to satisfy the SSN disclosure requirement if the PHA/MFH has exhausted all other attempts to obtain the required documentation. Self-certification of SSN and at least one third-party document, such as a bank statement, utility or cell phone bill, benefit letter, etc., that contains the name of the individual.
	Yes	Verification of Excluded Income. PHA/MFH Owner are not required to obtain verification for excluded income and may accept participant's self-certification as verification
	Yes	Zero Income Reviews. HUD does not require PHAs/MFH Owners to conduct periodic zero income reviews. In calculating annual income, PHAs/MFH Owners must not assign monetary value to non-monetary in-kind donations from a food bank or similar organization received by the family

**Financial Resources**

Sources	Planned \$	Planned Uses
<b>1. Federal Grants</b>		
a. Project Based Rental Assistance	\$1,869,682	PBRA Property operations
b. Annual Contributions for Housing Choice Voucher – Based Assistance – Subsidy	\$19,744,614 (HCV); \$399,680 (MS5); \$853,488 (EHV)	Housing and Utility Voucher payments for the HCV Program for Port-Outs and S8 Project based vouchers.
c. Annual Contributions for Housing Choice Voucher – Based Assistance Administration	\$1,119,269 (HCV); \$51,954 (MS5); \$54,000 (EHV)	Operating/Administrative Expenses
d. FSS Family Self Sufficiency	\$84,714.00	Grant Awarded for FSS programming
<b>2. Other Income Non-Federal Sources</b>		
a. Tenant Rents	\$2,600,356	Rental to fund operations and maintenance for Public Housing properties
b. Resident Support Services-Madison	\$70,600	Funds on site Resident Support Services
c. Resident Support Services-Coffelt	\$181,010	Funds on site Resident Support Services
d. Bridge to Permanency Program	\$0	Housing Assistance Payments and Supportive Services for Special Populations
e. TBRA Homelessness	\$0	Housing Assistance Payment and Supportive Services for Special Populations
f. Resident Support Services-Eastline	\$25,843	Housing Assistance Payments and Supportive Services for Special Populations
g. Resident Support Services-Heritage	\$52,549	Housing Assistance Payments and Supportive Services for Special Populations
<b>Total Resources</b>	<b>\$27,107,759</b>	

**Rent Determination**

Payment standards are used to calculate the housing assistance payment (HAP) that the HAMC pays to the owner on behalf of the family leasing the unit. The level at which the payment standard amount is set directly affects the amount of subsidy a family will receive, and the amount of rent paid by program participants. Each Housing Authority must adopt a payment standard schedule that establishes voucher payment standard amounts for each unit size, for each FMR area, in the HAMC’s jurisdiction between 90% to 110% of FY2023 Final Fair Market Rents.

Effective February 1, 2024, the HAMC will increase the payment standard for Efficiency units to 100% of the FMR, 1-Bedroom units to 90% of the FMR, 2-bedroom units to 100% of the FMR, 3-6-bedroom units and higher will be at 90% of the FMR updating the Payment Standards as follows:

Bedroom Size	Fair Market Rent 2023	HAMC Payment Standard
Efficiency	\$1,460	\$1,460
1	\$1,599	\$1,570
2	\$1,877	\$1,879
3	\$2,541	\$2,300
4	\$2,890	\$2,601
5	\$3,323	\$2,991
6	\$3,757	\$3,382



**Operation and Management**

- A. The HAMC is governed by a Board of Commissioners (BOC) who assist the Housing Authority to further its mission. The BOC is comprised of at least six, but not more than seven members.
  - 1. The BOC must appoint a person to serve as the Executive Director of the Housing Authority. The Executive Director has general supervision of the Housing Authority's administrative business affairs and is responsible for managing the housing projects and recreational facilities. Effective July 26, 2023, the BOC appointed an Executive Director.
- B. Under the Generally Accepted Accounting Principals (GAAP), uncollectible accounts are allowed to be deducted; and the write-offs are for tenants with a balance older than 90 days in Tenant Accounts Receivable. Write-offs are a part of the HUD Tenant Accounts scoring threshold and it is the goal of the HAMC to have Tenant Accounts Receivable no more than 1.5% of billed tenant charges. The BOC approved the following write-offs:

Approval Date	Amount and Description
5.24.2023	\$32,858.82 in uncollectible tenant accounts for the calendar year of January 2022 through December 2022
8.23.2023	\$95,823.75 in uncollectible tenant accounts for the fiscal year of July 2023 through June 2023

**Self Sufficiency Programs and Treatment of Income Changes Resulting from Welfare Program Requirements**

Pursuant to HUD’s new final rule published in the Federal Register on May 17, 2022, regarding the Family Self-Sufficiency (FSS) Program, the HAMC revised its FSS Action Plan to comply with the following changes:

Internal Control Subject	FSS Action Plan Subject
Processing FSS Disbursements	Use of Forfeited Escrow Funds
Forfeited Escrow Funds Management	Management of Forfeited Escrow Funds

**B.2** New Activities. – Not Applicable

**B.3 Progress Report.**

Provide a description of the PHA's progress in meeting its Mission and Goals described in its 5-Year PHA Plan.

The HAMC continued to make progress towards meeting its mission and goals, as described in the Five-Year plan by achieving the following overall accomplishments throughout 2023:

- A. In our continued effort to increase affordable housing options within Maricopa County, we sought out specific development projects to increase housing capacity for low-income, underserved populations, and to ensure our properties are more energy efficient.
  - 1. Heritage Senior Apartments received an award of \$9.1 million from HUD under their Section 202 program to develop 99 one-bedroom units that will be affordable to seniors. The project also received a reservation of \$2,080,000 in Low Income Housing Tax Credits (LIHTC) from the Arizona Department of Housing in June 2022. Debt and Equity Financing closed December 2023 and begin construction January 2024. Heritage Senior Apartments will be located next door to the City of Surprise's new Senior Center which will also start construction in 2024. The property from virtue of its design and location will offer a plethora of services to our seniors.
  - 2. Norton Circle Apartments had its equity closing on Sept 19, 2022. Construction will be completed by March 2024 and stabilized occupancy by July 2024. Upon completion, the development will have 100 one, two, and three-bedroom affordable units. There will also be a separate community building for various services and programming. This is HAMC's first project as sole developer and will include 50 Project Based Vouchers (PBVs).
  - 3. Estrella Springs and Suncrest Vista is a Tax-Exempt Bond Project that will secure 640 affordable multifamily units (senior and family) on 28 acres of land in partnership with Dominion. Construction is underway and scheduled to be completed in Quarter 4 of 2025.
- B. With a renewed focus on delivering self-sufficiency programming, the HAMC continues to implement unique initiatives to meet resident needs. Through partnership with various community organizations, we were able to successfully expand, and implement more than 14 service components, ranging from after-school programming to mental health support.
  - 1. Received the following local grant funds or donations to support Resident Services:
    - SCOPE Surprise \$7,500
    - United Health Care Resident Services \$15,000
    - Phoenix IDA / AZ CF \$25,000
  - 2. HAMC's Resident Service Program strategic plan was created to accommodate HAMC's new and future developments. Assessed current state and service offerings inventory, defined desired state, and based on interviews with internal subject matter experts, identified the Four Pillars of Resident Services: Childcare; Before and After School Programming; Education/Workforce; and Health & Housing Stability.
    - ASU Health Events with Sana-Sana
    - Farm Express partner at Coffelt-Lamoreaux
    - Summer DCC Camp scholarships
    - National HUD Fatherhood Celebration
- C. Five-Year Strategic Planning efforts have continued, focusing on employee engagement activities, enhancing customer-centric programs and supportive services, expanding the agency's visibility within the community, and renewed development strategies. The HAMC continues to modify its approach to achieve successful strategic plan outcomes, and all year-three objectives have been reviewed to ensure timely completion in 2023. Highlights include, but are not limited to the the following:
  - 1. In celebration of the agency's 80 years of service, the following enhancements were achieved to expand the agency's visibility and community engagement:
    - Full rebuild of agency website to provide clear navigation of housing options and resources
    - HAMC logo, stationery and community events to promote branding, employee identity and marketing
    - Published an updated employee directory for external use.
    - Improved social media presence to share HAMC stories and events (Next Door and LinkedIn)
  - 2. Through the agency's new website, HAMC actively receives invitations from developers to collaborate with HAMC on affordable projects. In addition, HAMC is accepting proposals from qualified, responsible, local landlords and/or developers to request up to thirty-five (35) Section 8 Project Based Vouchers to support affordable housing in Maricopa County.

	<p>3. To build employee capacity and organizational support, HAMC staff undertake the following annual compliance practices:</p> <ul style="list-style-type: none"> <li>• Annual Fair Housing Training</li> <li>• LIHTC Compliance Training</li> <li>• Virtual classroom on-board and training classes</li> <li>• Connect financial staff with HUD and other knowledgeable financial institutions.</li> <li>• Promote longevity within the agency through Employee Service Awards and recognition.</li> <li>• Hold a periodic virtual meet and greet with staff, all-hands meeting to create positive work environment and collaborative sharing.</li> </ul> <p>4. Relaxed complex instructions on completing applications and certifications through changes in Administrative and Tenant Selection Plans</p> <p>5. Provide virtual briefings and online forms for participant and resident convenience.</p> <p>D. The HAMC continues to successfully implement the HUD sponsored voluntary Family Self-Sufficiency (FSS) Program that assists HCV participants achieve economic independence. Participants work with a Case Manager to assess their strengths, identify barriers, set goals, and work to achieve them. In 2023, there were 45 active participants and four (4) graduates. Revisions to the FSS Action Plan and amendments to the Internal Control Policy reflect use and management of Forfeited Escrow Funds</p> <p>E. HAMC has established various partnerships with municipalities and private developers to develop or add affordable housing units in mixed income communities in the following cities:</p> <ul style="list-style-type: none"> <li>• City of El Mirage</li> <li>• City of Surprise,</li> <li>• \$23 Million Project – Senior Only (HAMC owned and managed)</li> <li>• City of Chandler</li> <li>• City of Mesa</li> <li>• City of Wickenburg</li> <li>• City of Goodyear</li> <li>• \$166 Million Project (3rd Party owned and managed)</li> </ul>
<b>B.4</b>	<b>Capital Improvements.</b> – Not Applicable
<b>B.5</b>	<p><b>Most Recent Fiscal Year Audit.</b></p> <p>(a) Were there any findings in the most recent FY Audit?</p> <p>Y N N/A  <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/></p> <p>(b) If yes, please describe:</p>
<b>C. Other Document and/or Certification Requirements.</b>	
<b>C.1</b>	<p><b>Resident Advisory Board (RAB) Comments.</b></p> <p>(a) Did the RAB(s) have comments to the PHA Plan?</p> <p>Y N  <input type="checkbox"/> <input checked="" type="checkbox"/></p> <p>(b) If yes, comments must be submitted by the PHA as an attachment to the PHA Plan. PHAs must also include a narrative describing their analysis of the RAB recommendations and the decisions made on these recommendations.</p>
<b>C.2</b>	<p><b>Certification by State or Local Officials.</b></p> <p><a href="#">Form HUD 50077-SL</a>, <i>Certification by State or Local Officials of PHA Plans Consistency with the Consolidated Plan</i>, must be submitted by the PHA as an electronic attachment to the PHA Plan.</p>

C.3	<p><b>Civil Rights Certification/ Certification Listing Policies and Programs that the PHA has Revised since Submission of its Last Annual Plan.</b></p> <p>Form HUD-50077-ST-HCV-HP, <i>PHA Certifications of Compliance with PHA Plan, Civil Rights, and Related Laws and Regulations Including PHA Plan Elements that Have Changed</i>, must be submitted by the PHA as an electronic attachment to the PHA Plan.</p>
C.4	<p><b>Challenged Elements.</b> If any element of the PHA Plan is challenged, a PHA must include such information as an attachment with a description of any challenges to Plan elements, the source of the challenge, and the PHA's response to the public.</p> <p>(a) Did the public challenge any elements of the Plan?</p> <p>Y N  <input type="checkbox"/> <input checked="" type="checkbox"/></p> <p>If yes, include Challenged Elements.</p>

<b>D.</b>	<b>Affirmatively Furthering Fair Housing (AFFH).</b>
<b>D.1</b>	<p><b>Affirmatively Furthering Fair Housing (AFFH).</b></p> <p><b>Provide a statement of the PHA’s strategies and actions to achieve fair housing goals outlined in an accepted Assessment of Fair Housing (AFH) consistent with 24 CFR § 5.154(d)(5). Use the chart provided below. (PHAs should add as many goals as necessary to overcome fair housing issues and contributing factors.) Until such time as the PHA is required to submit an AFH, the PHA is not obligated to complete this chart. The PHA will fulfill, nevertheless, the requirements at 24 CFR § 903.7(o) enacted prior to August 17, 2015. See Instructions for further detail on completing this item.</b></p> <p>The HAMC fully endorses and supports all Fair Housing laws. Our non-discrimination policy covers admission and access to, or treatment or employment in HAMC’s facilities, programs, services and activities. The HAMC has designated a Fair Housing Advocate to investigate allegations of housing discrimination by HAMC personnel or by landlords who rent properties to our HCV holders because of race, color, religion, gender, age, disability or handicap, familial or marital status, or national origin.</p> <div style="border: 1px solid black; padding: 5px;"> <p><b>Fair Housing Goal:</b> Promote Fair Housing and the opportunity for very low-income families of all ethnic backgrounds to experience freedom of housing choice. HAMC shall not deny any family or individual the equal opportunity to apply for or receive assistance under the HCV Programs based on race, color, sex, religion, creed, national or ethnic origin, age, familial or marital status, handicap or disability or sexual orientation.</p> <p><b><u>Describe fair housing strategies and actions to achieve the goal</u></b></p> <p>A. It is the policy of HAMC to comply fully with all Federal, State, and local non-discrimination laws and with the rules and regulations governing Fair Housing and Equal Opportunity in housing and employment including:</p> <ol style="list-style-type: none"> <li>1. Title VI of the Civil Rights Acts of 1964.</li> <li>2. Title VIII of the Civil Rights Act of 1968 (as amended by the Community Development Act of 1974 and the Fair Housing Amendments Act of 1988).</li> <li>3. Executive Order 11063.</li> <li>4. Section 504 of the Rehabilitation Act of 1973.</li> <li>5. The Age Discrimination Act of 1975.</li> <li>6. Title II of the Americans with Disabilities Act (to the extent it applies, otherwise Section 504 and the Fair Housing Amendments govern).</li> <li>7. Violence Against Women Reauthorization Act of 2013 (VAWA).</li> </ol> <p>B. HAMC takes steps to assure families and owners are fully aware of all applicable civil rights laws. HAMC provides, as part of the briefing process, information to HCV applicants about civil rights requirements and the opportunity to rent in a broad range of neighborhoods.</p> <p>C. The Housing Assistance Payments (HAP) Contract informs owners of the requirements not to discriminate against any person because of race, color, religion, sex, national origin, age, familial status, or disability in connection with the contract. The HAMC shall not:</p> <ol style="list-style-type: none"> <li>1. Deny any family the opportunity to apply for housing nor deny any qualified applicant the opportunity to lease housing suitable to its needs.</li> <li>2. Provide housing which is different from that provided to others.</li> <li>3. Subject a person to segregation or disparate treatment.</li> <li>4. Restrict a person's access to any benefit enjoyed by others in connection with the housing program.</li> <li>5. Treat a person differently in determining eligibility or other requirements for admission.</li> <li>6. Steer an applicant or participant toward or away from a particular area based on any of these factors.</li> <li>7. Deny a person access to the same level of services.</li> <li>8. Deny an individual opportunity to participate in HAMC HCV programs with prior drug charges if a person has issues of mental health.</li> </ol> <p>D. Applicants or participants who believe that they have been subject to unlawful discrimination may notify HAMC either orally or in writing. HAMC will provide a copy of a discrimination complaint form to the complainant and provide them with information on how to complete and submit the form to HUD’s Office of Fair Housing and Equal Opportunity (FHEO). HAMC will make every attempt to remedy any discrimination complaints made against HAMC but if unsuccessful, the same information will be provided to complainants.</p> </div>

**Fair Housing Goal:** HAMC will ensure persons with disabilities have full access to HAMC programs and services. No individual with disabilities shall be denied the benefits of, be excluded from, participation in, or otherwise be subjected to discrimination because HAMC's facilities are inaccessible to or unusable by persons with disabilities.

**Describe fair housing strategies and actions to achieve the goal**

An individual with a disability may request a reasonable accommodation anytime during the application process or participation in the HCV Program by contacting the HAMC office.

- A. A "reasonable accommodation" is defined as a change, modification, alteration or adaptation in policy, procedures, practice, program or facility that is necessary for a qualified individual with a disability to have the opportunity to participate in, and benefit from, a program or activity.
- B. Reasonable accommodations shall include, but are not limited to, assistance for persons with disabilities in locating appropriate accessible units, referrals to other community agencies that provide such assistance and intervention with property owners to negotiate permission to make reasonable modifications in accordance with all provisions of the law.
- C. At the initial point of contact, HAMC will inform each applicant of alternative forms of communication that can be used other than plain language paperwork. To meet the needs of persons with hearing impairments, TTD/TTY communication will be made available through the State of Arizona relay system. To meet the needs of persons with vision impairments, HAMC will explain materials orally or ask the individual plan for a third-party representative of their choice to receive, interpret and explain materials.
- D. HAMC will comply with all regulations related to physical accessibility including the following:
  - 1. PIH 2002-01.
  - 2. Section 504 of the Rehabilitation Act of 1973.
  - 3. The Americans with Disabilities Act of 1990.
  - 4. The Architectural Barriers Act of 1968.
  - 5. The Fair Housing Act of 1988.
- E. When issuing a voucher to a family that includes an individual with disabilities, HAMC will refer families to various resources to locate appropriate housing including but not limited to AffordableHousing.com, Craigslist, and Apartment Hunters.
- F. HAMC will advise owners of the requirement to allow the family to make reasonable modifications to units. Applicants and participants will be advised that owners are not required to pay for modifications and their responsibility to return the unit to its original state at the family's expense when the family moves. HAMC will refer the family to community agencies that may be able to assist with unit modifications.
- G. HAMC will take affirmative steps to communicate with people who need services or information in a language other than English (LEP persons).
  - 1. A significant number of LEP persons eligible to be served or likely to be encountered by the HCV Program in Maricopa County, use Spanish as their primary language. HAMC will assure that bi-lingual (Spanish-English) staff is available to act as interpreters and translators. HAMC will provide written translation to Spanish of vital documents and all correspondence that represents compliance requirements or adverse action against the LEP person.
  - 2. HAMC serves very few LEP persons in any language other than Spanish. Therefore, HAMC will not include any other language in this LEP Plan. However, to assure access for persons with other language needs, HAMC will use alternative ways to articulate in a reasonable manner to assure meaningful access for LEP persons with needs in languages other than Spanish. These alternatives will include the use of community volunteers, family members and friends as interpreters for LEP persons whose primary language is other than Spanish or English.

# Instructions for Preparation of Form HUD-50075-HCV Annual PHA Plan for HCV-Only PHAs

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

A.1 Include the full **PHA Name, PHA Code, PHA Type, PHA Fiscal Year Beginning** (MM/YYYY), **Number of Housing Choice Vouchers (HCVs), PHA Plan Submission Type**, and the **Availability of Information**, specific location(s) of all information relevant to the public hearing and proposed PHA Plan.

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

## B. Plan Elements. All PHAs must complete this section. ([24 CFR §903.11\(c\)\(3\)](#))

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

Identify specifically which plan elements listed below that have been revised by the PHA. To specify which elements have been revised, mark the “yes” box. If an element has not been revised, mark “no.”

**Statement of Housing Needs and Strategy for Addressing Housing Needs.** Provide a statement addressing the housing needs of low-income, very low-income and extremely low-income families and a brief description of the PHA’s strategy for addressing the housing needs of families who reside in the jurisdiction served by the PHA and other families who are on the Section 8 tenant-based assistance waiting lists. The statement must identify the housing needs of (i) families with incomes below 30 percent of area median income (extremely low-income); (ii) elderly families (iii) households with individuals with disabilities, and households of various races and ethnic groups residing in the jurisdiction or on the public housing and Section 8 tenant-based assistance waiting lists. The statement of housing needs shall be based on information provided by the applicable Consolidated Plan, information provided by HUD, and generally available data. The identification of housing needs must address issues of affordability, supply, quality, accessibility, size of units, and location. Once the PHA has submitted an Assessment of Fair Housing (AFH), which includes an assessment of disproportionate housing needs in accordance with 24 CFR 5.154(d)(2)(iv), information on households with individuals with disabilities and households of various races and ethnic groups residing in the jurisdiction or on the waiting lists no longer needs to be included in the Statement of Housing Needs and Strategy for Addressing Housing Needs. (24 CFR § 903.7(a)).

The identification of housing needs must address issues of affordability, supply, quality, accessibility, size of units, and location. ([24 CFR §903.7\(a\)\(2\)\(i\)](#)) Provide a description of the ways in which the PHA intends, to the maximum extent practicable, to address those housing needs in the upcoming year and the PHA’s reasons for choosing its strategy. ([24 CFR §903.7\(a\)\(2\)\(ii\)](#))

**Deconcentration and Other Policies that Govern Eligibility, Selection, and Admissions.** A statement of the PHA’s policies that govern resident or tenant eligibility, selection and admission including admission preferences for HCV. ([24 CFR §903.7\(b\)](#))

**Financial Resources.** A statement of financial resources, including a listing by general categories, of the PHA’s anticipated resources, such as PHA HCV funding and other anticipated Federal resources available to the PHA, as well as tenant rents and other income available to support tenant-based assistance. The statement also should include the non-Federal sources of funds supporting each Federal program, and state the planned use for the resources. ([24 CFR §903.7\(c\)](#))

**Rent Determination.** A statement of the policies of the PHA governing rental contributions of families receiving tenant-based assistance, discretionary minimum tenant rents, and payment standard policies. ([24 CFR §903.7\(d\)](#))

**Operation and Management.** A statement that includes a description of PHA management organization, and a listing of the programs administered by the PHA. ([24 CFR §903.7\(e\)](#)).

**Informal Review and Hearing Procedures.** A description of the informal hearing and review procedures that the PHA makes available to its applicants. ([24 CFR §903.7\(f\)](#))

**Homeownership Programs.** A statement describing any homeownership programs (including project number and unit count) administered by the agency under section 8y of the 1937 Act, or for which the PHA has applied or will apply for approval. ([24 CFR §903.7\(k\)](#))

**Self Sufficiency Programs and Treatment of Income Changes Resulting from Welfare Program Requirements.** A description of any PHA programs relating to services and amenities coordinated, promoted, or provided by the PHA for assisted families, including those resulting from the PHA’s partnership with other entities, for the enhancement of the economic and social self-sufficiency of assisted families, including programs provided or offered as a result of the PHA’s partnerships with other entities, and activities subject to Section 3 of the Housing and Community Development Act of 1968 (24 CFR Part 135) and under requirements for the Family Self-Sufficiency Program and others. Include the program’s size (including required and actual size of the FSS program) and means of allocating assistance to households. ([24 CFR §903.7\(l\)\(i\)](#)) Describe how the PHA will comply with the requirements of section 12(c) and (d) of the 1937 Act that relate to treatment of income changes resulting from welfare program requirements. ([24 CFR §903.7\(l\)\(iii\)](#)).

**Substantial Deviation.** PHA must provide its criteria for determining a “substantial deviation” to its 5-Year Plan. ([24 CFR §903.7\(r\)\(2\)\(i\)](#))

**Significant Amendment/Modification.** PHA must provide its criteria for determining a “Significant Amendment or Modification” to its 5-Year and Annual Plan.

If any boxes are marked “yes”, describe the revision(s) to those element(s) in the space provided.

- B.2 New Activities.** This section refers to new capital activities which is not applicable for HCV-Only PHAs.
- B.3 Progress Report.** For all Annual Plans following submission of the first Annual Plan, a PHA must include a brief statement of the PHA's progress in meeting the mission and goals described in the 5-Year PHA Plan. ([24 CFR §903.11\(c\)\(3\)](#), [24 CFR §903.7\(r\)\(1\)](#))
- B.4 Capital Improvements.** This section refers to PHAs that receive funding from the Capital Fund Program (CFP) which is not applicable for HCV-Only PHAs
- B.5 Most Recent Fiscal Year Audit.** If the results of the most recent fiscal year audit for the PHA included any findings, mark "yes" and describe those findings in the space provided. ([24 CFR §903.7\(p\)](#))

**C. Other Document and/or Certification Requirements.**

- C.1 Resident Advisory Board (RAB) comments.** If the RAB had comments on the annual plan, mark "yes," submit the comments as an attachment to the Plan and describe the analysis of the comments and the PHA's decision made on these recommendations. ([24 CFR §903.13\(c\)](#), [24 CFR §903.19](#))
- C.2 Certification by State of Local Officials.** Form HUD-50077-SL, *Certification by State or Local Officials of PHA Plans Consistency with the Consolidated Plan*, must be submitted by the PHA as an electronic attachment to the PHA Plan. ([24 CFR §903.15](#)). Note: A PHA may request to change its fiscal year to better coordinate its planning with planning done under the Consolidated Plan process by State or local officials as applicable.
- C.3 Civil Rights Certification/ Certification Listing Policies and Programs that the PHA has Revised since Submission of its Last Annual Plan.** Provide a certification that the following plan elements have been revised, provided to the RAB for comment before implementation, approved by the PHA board, and made available for review and inspection by the public. This requirement is satisfied by completing and submitting form HUD-50077 ST-HCV-HP, *PHA Certifications of Compliance with PHA Plan, Civil Rights, and Related Laws and Regulations Including PHA Plan Elements that Have Changed*. Form HUD-50077-ST-HCV-HP, *PHA Certifications of Compliance with PHA Plan, Civil Rights, and Related Laws and Regulations Including PHA Plan Elements that Have Changed* must be submitted by the PHA as an electronic attachment to the PHA Plan. This includes all certifications relating to Civil Rights and related regulations. A PHA will be considered in compliance with the certification requirement to affirmatively further fair housing if the PHA fulfills the requirements of §§ 903.7(o)(1) and 903.15(d) and: (i) examines its programs or proposed programs; (ii) identifies any fair housing issues and contributing factors within those programs, in accordance with 24 CFR 5.154; or 24 CFR 5.160(a)(3) as applicable (iii) specifies actions and strategies designed to address contributing factors, related fair housing issues, and goals in the applicable Assessment of Fair Housing consistent with 24 CFR 5.154 in a reasonable manner in view of the resources available; (iv) works with jurisdictions to implement any of the jurisdiction's initiatives to affirmatively further fair housing that require the PHA's involvement; (v) operates programs in a manner consistent with any applicable consolidated plan under 24 CFR part 91, and with any order or agreement, to comply with the authorities specified in paragraph (o)(1) of this section; (vi) complies with any contribution or consultation requirement with respect to any applicable AFH, in accordance with 24 CFR 5.150 through 5.180; (vii) maintains records reflecting these analyses, actions, and the results of these actions; and (viii) takes steps acceptable to HUD to remedy known fair housing or civil rights violations. impediments to fair housing choice within those programs; addresses those impediments in a reasonable fashion in view of the resources available; works with the local jurisdiction to implement any of the jurisdiction's initiatives to affirmatively further fair housing; and assures that the annual plan is consistent with any applicable Consolidated Plan for its jurisdiction. ([24 CFR §903.7\(o\)](#)).
- C.4 Challenged Elements.** If any element of the Annual PHA Plan or 5-Year PHA Plan is challenged, a PHA must include such information as an attachment to the Annual PHA Plan or 5-Year PHA Plan with a description of any challenges to Plan elements, the source of the challenge, and the PHA's response to the public.

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

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

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

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This information collection is authorized by Section 511 of the Quality Housing and Work Responsibility Act, which added a new section 5A to the U.S. Housing Act of 1937, as amended, which introduced the Annual PHA Plan. The Annual PHA Plan provides a ready source for interested parties to locate basic PHA policies, rules, and requirements concerning the PHA's operations, programs, and services, and informs HUD, families served by the PHA, and members of the public for serving the needs of low- income, very low- income, and extremely low- income families.

Public reporting burden for this information collection is estimated to average 6.02 hour per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. HUD may not collect this information, and respondents are not required to complete this form, unless it displays a currently valid OMB Control Number.

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