

**City of Plano Staff Review Checklist  
2010 Consolidated Grant Application**

Agency: Plano Housing Authority

Program: Family Self-Sufficiency "Steps to Success"

Application Type:    Program Service            Permanent Housing            Site/Equipment

- One Copy of Grant Cover Sheet, Application, CD, and Attachments
  - Original signatures on cover sheet
  - Unbound, no staples, loose leaf format
  - Printed on one side of white 8½" x 11" paper,
  - With page numbers
  - All pages included
  - No blank answers

Attachments

- 1 - Detailed Annual Organization Budget for Current Fiscal Year
- 2a - List of Organization's Officers/Board Members
- 2b - Board Annual Meeting Schedule
- 3 - Resume of Director
- N/A  4 - Copy of Organization's latest tax return accepted by IRS *not needed as government funded agency*
- N/A  5 - Copy of Organization's Certificate of Good Standing from State Comptroller's Office *government agency for HUD - not needed.*
- 6 - Copy of Organization's most recent audit of Financial Records
- 7 - Organization's Audit Information Certification Form
- Program Service 8 - Detailed Annual Program Budget
- N/A  Site /Equipment 8 - 2 or 3 bids - *no request for equipment or site made*

Organization Eligibility

- Must use proposed funds for Plano residents
- Non-profit or public agency
- In compliance with any previous City of Plano contracts
- Operation for a minimum of three years

Completed by: \_\_\_\_\_

  
Staff

3-19-2010 11:55  
Date & Time

Plano Housing Authority  
Budget 7/1/09 - 6/30/10

	Account	Public (1-01)	Sec 8 (8-01)	IKE (66-IKE)	DHAP to HCV (44 DHP)	DVP (22-KA)	DHAP (77-DHP)	Non-Hud (9-01)	All Programs
<b>Revenues</b>									
Admin Fees Earned	3300.P	0	(766,208)	(10,417)	(23,715)	(34,648)	(55,148)	0	(890,136)
Case Mgmt Fees	3111	0	0	(4,300)	0	0	0	0	(4,300)
Dwelling Rental	3110	(85,104)	0	0	0	0	0	0	(85,104)
NonDwelling Rental	3190	0	0	0	0	0	0	(107,296)	(107,296)
Fraud Recovery	3450	0	(8,146)	0	0	0	0	0	(8,146)
Interest	3610-5	0	(6,112)	0	0	0	0	0	(6,112)
Misc.	3690	(7,134)	0	0	0	0	0	(930)	(8,064)
Grants		0	0	0	0	0	0	0	0
FSS Grant		0	(35,028)	0	0	0	0	0	(35,028)
Subsidy		(91,756)	0	0	0	0	0	0	(91,756)
<b>Total Revenues</b>		<b>(183,994)</b>	<b>(815,494)</b>	<b>(14,717)</b>	<b>(23,715)</b>	<b>(34,648)</b>	<b>(55,148)</b>	<b>(108,226)</b>	<b>(1,235,942)</b>
<b>Expenses</b>									
Admin Fees Paid for Port	4590.P	0	2,888	0	0	0	0	0	2,888
Non-Technical Salaries	4110	47,737	453,517	17,185	0	0	45,326	0	563,765
Staff Training	4140	1,349	3,649	0	0	0	0	400	5,398
Travel	4150	3,006	13,172	69	0	0	2,435	0	18,682
Accounting Fees	4170	2,041	28,213	909	0	0	2,842	0	34,005
Computer Services	4170.1	907	11,156	124	0	0	1,954	0	14,141
Audit Fees	4170.2	585	9,358	0	0	0	0	0	9,943
Consultant Fees	4181	118	300	0	0	0	400	0	818
Sundry	4190	940	7,244	0	0	0	1,797	5,922	15,903
Postage	4190.1	268	1,504	0	0	0	237	0	2,009
Inspection Services	4190.09	0	2,468	0	0	0	314	0	2,782
Temporary Services	4190.11	0	323	0	0	0	11,932	0	12,255
Membership, Dues	4190.12	592	6,054	0	0	0	369	2,123	9,138
Telephone	4190.13	1,927	13,909	414	0	0	614	0	16,864
Tenant Background	4190.14	551	8,806	0	0	0	0	0	9,357
Forms, Office Supplies	4190.17	3,180	51,548	128	0	0	1,867	200	56,923
Admin Contracts	4190.19	875	0	0	0	0	0	8,383	9,258

Plano Housing Authority  
Budget 7/1/09 - 6/30/10

	Account	Public (1-01)	Sec 8 (8-01)	IKE (66-IKE)	DHAP to HCV (44 DHP)	DVP (22-KA)	DHAP (77-DHP)	Non-Hud (9-01)	All Programs
Equip. Lease	4190.2	949	7,045	76	0	0	354	0	8,424
Tenant / Landlord Meetings	4190.21	0	3,984	0	0	0	1,949	4,701	10,634
Commissoners Meetings	4190.22	0	476	0	0	0	0	512	988
Office Rent	4199	12,000	74,796	0	0	0	20,500	0	107,296
Water	4310	1,460	0	0	0	0	0	3,627	5,087
Electric	4320	3,794	0	0	0	0	0	14,479	18,273
Maintenance	4400	4,777	80	0	0	0	0	0	4,857
Labor	4410	31,688	10,799	0	0	0	0	0	42,487
Materials	4420	7,039	1,230	17	0	0	236	1,290	9,812
Contract Costs	4430	5,218	0	0	0	0	0	725	5,943
Contract Costs - Repairs	4430.03	2,650	0	0	0	0	0	250	2,900
Contract Costs - Maint	4430.09	14,515	0	0	0	0	0	160	14,675
Contract Costs - Mowing	4430.12	3,148	0	0	0	0	0	4,456	7,604
Contract Costs - Other	4430.13	297	390	16	0	0	12	1,440	2,155
Contract Costs - Archiving Files	4430.17	1,046	19,503	0	0	0	0	0	20,549
Contract Costs - Offsite Storage	4430.40	74	1,196	0	0	0	26	0	1,296
Garbage Removal	4431	0	0	0	0	0	0	2,772	2,772
Insurance	4510	6,605	28,108	0	0	0	784	0	35,497
Employee Benefits	4540	19,943	83,836	3,555	0	0	8,039	0	115,373
Collection Losses	4570.9	0	0	0	0	0	0	0	0
Interest On Notes	4580	0	0	0	0	0	0	28,172	28,172
<b>Total Expenses</b>		<b>179,279</b>	<b>845,552</b>	<b>22,493</b>	<b>0</b>	<b>0</b>	<b>101,987</b>	<b>79,612</b>	<b>1,228,924</b>
<b>Revenue less Expenses</b>		<b>4,715</b>	<b>(30,058)</b>	<b>(7,776)</b>	<b>23,715</b>	<b>34,648</b>	<b>(46,839)</b>	<b>28,614</b>	<b>7,019</b>



Mission Statement  
To provide quality affordable housing to low income families while offering opportunities  
that enable families to achieve self sufficiency.

# Plano Housing Authority

HELEN MACEY Executive Director

Board of  
COMMISSIONERS

EARNEST BURKE  
Chairperson

PAUL GEPHART  
Vice-Chairperson

STELLA VEA  
Commissioner

WANDA RUSSELL  
Commissioner

KATHY HINES  
Commissioner

## Board of Commissioners

Earnest Burke, Chair  
2404 Brabant Drive  
Plano, TX 75025  
Insurance  
African-American

Paul J. Gephart, Vice-Chair  
4609 Eaton Court  
Plano, TX 75093  
Retired  
White/Anglo

Stella Vea  
7805 Hamburg Court  
Plano, TX 75025  
Educator  
Hispanic

Wanda Russell  
8629 Orchard Hill Dr  
Plano, TX 75025  
Retired  
African-American

Kathy Hines, Resident Commissioner  
1425 Colmar Dr  
Plano, TX 75023  
Real Estate  
African-American

City Council Liaisons: Jean Callison and Ben Harris

The Housing Authority of the City of Plano Board of Commissioners convenes into  
the regular meeting on the fourth Tuesday of each month at 6:30pm at the Plano  
Housing Authority Administrative Office located at 1740 Avenue G.

**HELEN MACEY, PHM**

**PLANO HOUSING AUTHORITY  
EXECUTIVE DIRECTOR**

1740 Avenue G  
Plano, TX 75074  
972-423-4928

**EXPERIENCE**

**1994 – Present**                      **Plano Housing Authority**                      **Plano, TX**  
**Executive Director**

- Increased Public Housing units from 26 to 58
- Increased Housing Choice Voucher program from 202 to 742
- Increased Portability vouchers generating an income stream that has created a reserve for construction of a new administration building

**1985 – 1994**                      **Pinal County Housing Authority**                      **Casa Grande, AZ**  
**Executive Director**

- Managed multiple counties Section 8 and Public Housing programs, including Indian Housing

**EDUCATION**

- Certified Public Housing Manager, 1987
- Certified Executive Housing Manager, 1992

**BOARDS & COMMITTEES**

- Plano West Rotary Club, Past President
- Collin County Community College Student Housing Foundation, Past Chair
- Collin County Adult Clinic, Board of Directors
- City of Plano, CDBG Loan Committee
- National Association of Housing & Redevelopment Officials – Regional Board of Directors, International Housing Committee, National Ethics Committee
- John Freeman Hightower Foundation, Member
- Plano Community Forum, Member
- MLK Celebration Committee Member and Past Secretary



**CITY OF PLANO  
CDBG/HOME REPORT**

AGENCY NAME: Plano Housing Authority

PROJECT NAME: Family Self-Sufficiency/Homeownership Program

REPORT FOR GRANT YEAR: 2008-2009

**NOTE: All clients served are to be reported as new during the first quarter in which they receive service. They are to be reported only one time during the year.**

	September 30 Quarter		December 31 Quarter		March 31 Quarter		June 30 Quarter		Annual Total	
	Total	# Hispanics	Total	# Hispanics	Total	# Hispanics	Total	# Hispanics	Total	# Hispanics
White/Anglo	0		0		0		0		0	1
African-American	0		0		0		0		10	
Asian	0		0		0		0		0	
American Indian/Alaskan Native	0		0		0		0		0	
Native Hawaiian/Other Pacific Islander	0		0		0		0		0	
American Indian and White	0		0		0		0		0	
Asian and White	0		0		0		0		0	
African American and White	0		0		0		0		0	
Indian and African American	0		0		0		0		0	
Other Multi-racial	0		0		0		0		0	
<b>Ethnicity Total (must equal Income Total)</b>	<b>0</b>		<b>0</b>		<b>0</b>		<b>0</b>		<b>10</b>	<b>1</b>
0-30% of Median Income	0		0		0		0		5	
30-50% of Median Income	0		0		0		0		4	1
50-80% of Median Income	0		0		0		0		1	
Over Income Limits	0		0		0		0		0	
<b>Income Total (must equal Ethnicity Total)</b>	<b>0</b>		<b>0</b>		<b>0</b>		<b>0</b>		<b>0</b>	
Female Heads of Household	0		0		0		0		10	1



CITY OF PLANO  
CDBG REPORT

AGENCY NAME: Plano Housing Authority  
PROJECT NAME: Family Self –Sufficiency /Homeownership Program  
REPORTING PERIOD (MONTHS/YEAR): 2008-2009

**PERFORMANCE MEASUREMENT REPORT**

For public services, public facilities and improvements:

Of the persons assisted, enter the number that:

- Have new access to your service or facility  
      0
  - Have improved access to this service or facility  
      0
  - Where activity was used to measurably improve quality, now have access to a service or facility that is no longer substandard  
      0
- Total     0
- No. of beds created in overnight shelter or other emergency housing  
      0

For short term rental/utility assistance

- Number of persons assisted     11    
  - Of those, number who received emergency financial assistance to prevent homelessness  
      0
- Number who received legal assistance to prevent homelessness  
      0

For housing construction and new homeowner programs

- Dwelling units qualified as Energy Star  
      0
- Handicap (Section 504) Accessible units  
      0
- Households previously living in subsidized housing  
      0
- Units occupied by elderly  
      0

# AGENCY SUMMARY REPORT

(Submit with Final CDBG/HOME)

CDBG Grant Year: 7-1- 2008 TO 6-30- 2009 (Fill in Year)

Revenue: 10, 000.00       CDBG     HOME (check box)

**EXPENSES** - For CDBG: Add categorical expenses & For HOME: Add by project.

**A. Utilities- Gas** <-- (place expense category or project name)

	<u>Expense A. Details</u> (if applicable)	<u>Amount Spent</u>
1	3RD QUARTER	496.65
2	4TH QUARTER	64.51
3		
4		
5		

**Total A.      561.16**

**Total A.      561.16**

**B. Utilities- Electric** <-- (place expense category or project name)

	<u>Expense A. Details</u> (if applicable)	<u>Amount Spent</u>
1	1ST QUARTER	910.86
2	4TH QUARTER	994.84
3		
4		
5		

**Total B.      1,905.70**

**Total B.      1,905.70**

**C. Utilities-Water** <-- (place expense category or project name)

	<u>Expense A. Details</u> (if applicable)	<u>Amount Spent</u>
1	2ND QUARTER	278.25
2	3RD QUARTER	225.03
3	4TH QUARTER	378.39
4		
5		

**Total C.      881.67**

**Total C.      881.67**

**D. Auto/School** <-- (place expense category or project name)

	<u>Expense A. Details</u> (if applicable)	<u>Amount Spent</u>
1	1ST QUARTER	507.00
2	2ND QUARTER	391.82
3	4TH QUARTER	3,880.45
4		
5		

**Total D.      4,779.27**

**Total D.      4,779.27**

**Total Grant Expenses:      8,127.80**



**CITY OF PLANO  
CDBG/HOME REPORT**

AGENCY NAME: Plano Housing Authority

PROJECT NAME: Family Self-Sufficiency/Homeownership Program

REPORT FOR GRANT YEAR: 2008-2009

**NOTE: All clients served are to be reported as new during the first quarter in which they receive service. They are to be reported only one time during the year.**

	September 30 Quarter		December 31 Quarter		March 31 Quarter		June 30 Quarter		Annual Total	
	Total	# Hispanics	Total	# Hispanics	Total	# Hispanics	Total	# Hispanics	Total	# Hispanics
White/Anglo	0		0		0		0	1	0	
African-American	0		0		0		4		0	
Asian	0		0		0		0		0	
American Indian/Alaskan Native	0		0		0		0		0	
Native Hawaiian/Other Pacific Islander	0		0		0		0		0	
American Indian and White	0		0		0		0		0	
Asian and White	0		0		0		0		0	
African American and White	0		0		0		0		0	
Indian and African American	0		0		0		0		0	
Other Multi-racial	0		0		0		0		0	
<b>Ethnicity Total (must equal Income Total)</b>	<b>0</b>		<b>0</b>		<b>0</b>		<b>4</b>	<b>1</b>	<b>0</b>	
0-30% of Median Income	0		0		0		2		0	
30-50% of Median Income	0		0		0		2	1	0	
50-80% of Median Income	0		0		0		0		0	
Over Income Limits	0		0		0		0		0	
<b>Income Total (must equal Ethnicity Total)</b>	<b>0</b>		<b>0</b>		<b>0</b>		<b>0</b>		<b>0</b>	
	0		0		0		0		0	
Female Heads of Household	0		0		0		4	1	0	



**CITY OF PLANO**  
**CDBG REPORT**

AGENCY NAME: Plano Housing Authority  
PROJECT NAME: Family Self –Sufficiency /Homeownership Program  
REPORTING PERIOD (MONTHS/YEAR): 04/01-06/30/2009

**PERFORMANCE MEASUREMENT REPORT**

For public services, public facilities and improvements:

Of the persons assisted, enter the number that:

- Have new access to your service or facility  
      0
- Have improved access to this service or facility  
      0
- Where activity was used to measurably improve quality, now have access to a service or facility that is no longer substandard  
      0

▪ Total   0  

- No. of beds created in overnight shelter or other emergency housing  
      0

For short term rental/utility assistance

- Number of persons assisted   5  
  - Of those, number who received emergency financial assistance to prevent homelessness  
      0
- Number who received legal assistance to prevent homelessness  
      0

For housing construction and new homeowner programs

- Dwelling units qualified as Energy Star  
      0
- Handicap (Section 504) Accessible units  
      0
- Households previously living in subsidized housing  
      0
- Units occupied by elderly