

Annual PHA Plan <i>(Standard PHAs and Troubled PHAs)</i>	U.S. Department of Housing and Urban Development Office of Public and Indian Housing	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-ST is to be completed annually by **STANDARD PHAs or TROUBLED PHAs**. PHAs that meet the definition of a High Performer PHA, Small PHA, HCV-Only PHA or Qualified PHA do not need to submit this form.

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 or 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.

A.	PHA Information.
A.1	<p>PHA Name: <u>Helena Housing Authority</u> PHA Code: <u>MT004</u></p> <p>PHA Type: <input checked="" type="checkbox"/> Standard PHA <input type="checkbox"/> Troubled PHA</p> <p>PHA Plan for Fiscal Year Beginning: (MM/YYYY): <u>07/2025</u></p> <p>PHA Inventory (Based on Annual Contributions Contract (ACC) units at time of FY beginning, above)</p> <p>Number of Public Housing (PH) Units <u>366</u> Number of Housing Choice Vouchers (HCVs) <u>401</u></p> <p>Total Combined Units/Vouchers <u>767</u></p> <p>PHA Plan Submission Type: <input checked="" type="checkbox"/> Annual Submission <input type="checkbox"/> Revised Annual Submission</p> <p>Availability of Information. 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. At a minimum, PHAs must post PHA Plans, including updates, at each Asset Management Project (AMP) and main office or central office of the PHA. PHAs are strongly encouraged to post complete PHA Plans on their official website. PHAs are also encouraged to provide each resident council a copy of their PHA Plans.</p> <p>How the public can access this PHA Plan: The Public may access a copy of this PHA Plan on the HHA Website (www.hhamt.org) under Programs- Documents for all programs tabs, or by requesting a copy from Michael M. O'Neil, Executive Director, HHA Administrative Office (812 Abbey Street; Helena, MT 59601) or requesting a copy through email at: moneil@hhamt.org, or by phone at (406) 794-3251. Helena Housing Authority (HHA) Board of Commissioners invited public comment and input regarding Helena Housing Authority's 5 Year PHA Plan, FY 2026 Annual Plan , and 2025 Capital Plan; advertising in our local newspaper, sending invites to all residents, and posting notices on our website, and in our office and housing sites. The meetings included a March 18, 2025 meeting the HHA Resident Management Council</p>

(Resident Advisory Board), and public hearings on April 8, 2025, and a April 15, 2025 final public hearing with the Board of Commissioners. The plan reviews included HHA's proposed low income public housing repositioning strategy and redevelopment plans, and revisions to the Public Housing Admissions and Continued Occupancy Policy (ACOP), and the Housing Choice Voucher (HCV) Administrative Plan related to VAWA 2022.

☐ **PHA Consortia:** (Check box if submitting a Joint PHA Plan and complete table below)

Participating PHAs	PHA Code	Program(s) in the Consortia	Program(s) not in the Consortia	No. of Units in Each Program	
				PH	HCV

B.	Plan Elements
B.1	<p>Revision of Existing PHA Plan Elements. (a) Have the following PHA Plan elements been revised by the PHA?</p> <p>Y N</p> <p><input type="checkbox"/> <input checked="" type="checkbox"/> Statement of Housing Needs and Strategy for Addressing Housing Needs</p> <p><input type="checkbox"/> <input checked="" type="checkbox"/> Deconcentration and Other Policies that Govern Eligibility, Selection, and Admissions.</p> <p><input type="checkbox"/> <input checked="" type="checkbox"/> Financial Resources.</p> <p><input type="checkbox"/> <input checked="" type="checkbox"/> Rent Determination.</p> <p><input type="checkbox"/> <input checked="" type="checkbox"/> Operation and Management.</p> <p><input type="checkbox"/> <input checked="" type="checkbox"/> Grievance Procedures.</p> <p><input type="checkbox"/> <input checked="" type="checkbox"/> Homeownership Programs.</p> <p><input type="checkbox"/> <input checked="" type="checkbox"/> Community Service and Self-Sufficiency Programs.</p> <p><input type="checkbox"/> <input checked="" type="checkbox"/> Safety and Crime Prevention.</p> <p><input type="checkbox"/> <input checked="" type="checkbox"/> Pet Policy.</p> <p><input type="checkbox"/> <input checked="" type="checkbox"/> Asset Management.</p> <p><input type="checkbox"/> <input checked="" type="checkbox"/> Substantial Deviation.</p> <p><input type="checkbox"/> <input checked="" type="checkbox"/> Significant Amendment/Modification</p> <p>(b) If the PHA answered yes for any element, describe the revisions for each revised element(s):</p> <p>(c) The PHA must submit its Deconcentration Policy for Field Office review.</p>
B.2	<p>New Activities. (a) Does the PHA intend to undertake any new activities related to the following in the PHA's current Fiscal Year?</p> <p>Y N</p> <p><input type="checkbox"/> <input checked="" type="checkbox"/> Hope VI or Choice Neighborhoods.</p> <p><input checked="" type="checkbox"/> <input type="checkbox"/> Mixed Finance Modernization or Development.</p> <p><input checked="" type="checkbox"/> <input type="checkbox"/> Demolition and/or Disposition.</p> <p><input checked="" type="checkbox"/> <input type="checkbox"/> Designated Housing for Elderly and/or Disabled Families.</p> <p><input checked="" type="checkbox"/> <input type="checkbox"/> Conversion of Public Housing to Tenant-Based Assistance.</p> <p><input checked="" type="checkbox"/> <input type="checkbox"/> Conversion of Public Housing to Project-Based Rental Assistance or Project-Based Vouchers under RAD.</p> <p><input type="checkbox"/> <input checked="" type="checkbox"/> Occupancy by Over-Income Families.</p> <p><input type="checkbox"/> <input checked="" type="checkbox"/> Occupancy by Police Officers.</p> <p><input type="checkbox"/> <input checked="" type="checkbox"/> Non-Smoking Policies.</p> <p><input checked="" type="checkbox"/> <input type="checkbox"/> Project-Based Vouchers.</p> <p><input checked="" type="checkbox"/> <input type="checkbox"/> Units with Approved Vacancies for Modernization.</p> <p><input type="checkbox"/> <input checked="" type="checkbox"/> Other Capital Grant Programs (i.e., Capital Fund Community Facilities Grants or Emergency Safety and Security Grants).</p> <p>(b) If any of these activities are planned for the current Fiscal Year, describe the activities. For new demolition activities, describe any public housing development or portion thereof, owned by the PHA for which the PHA has applied or will apply for demolition and/or disposition approval under section 18 of the 1937 Act under the separate demolition/disposition approval process. If using Project-Based Vouchers (PBVs), provide the projected number of project-based units and general locations, and describe how project basing would be consistent with the PHA Plan.</p> <p>Mixed Finance Modernization or Development. HHA currently is proposing the following repositioning strategy for all 366 of its current low-income public housing residences: Section 18 Disposition Obsolescence for Stewart Homes (132 units), Section 18 Disposition Scattered sites (37 units), and RAD/Section 18 Disposition Small PHA Close Out Blend for the remaining 197 public housing residences. HHA plans to have project based vouchers at all 366 of its units going through repositioning in order to preserve the affordable housing for the Helena community. HHA plans to complete major rehabilitation and redevelopment of these units. The first repositioning applications will be submitted in the next few months .</p> <p>Demolition and/or Disposition.</p>

	<p>HHA is now looking at an overall repositioning plan that would incorporate the following Section 18 : Removal of HHA Stewart Homes (132 units) via Section 18 Physical Obsolescence; Removal of 37 “scattered site units” via Section 18 Scattered Sites; Removal of the remaining inventory (197units) via the RAD/Section 18 Small PHA Close-out Blend. HHA anticipates submitting its first Section 18 disposition applications in late FY 25 or early FY 26.</p> <p>Designated Housing for Elderly and/or Disabled Families. HHA operates a 76 unit public housing property- ME Anderson designated for Elderly (55 years and older) and or Disabled. As part of HHA's Public Housing Repositioning strategy, the ME Anderson property is being considered as part of a final removal of remaining inventory RAD/Section 18 Small PHA Close-Out Blend.. HHA plans to maintain the Elderly/and/or Disabled Designation as part of this transition.</p> <p>Conversion of Public Housing to Tenant-Based Assistance. HHA's repositioning strategy may include Tenant Protect Vouchers in some of its repositioning conversions.</p> <p>Conversion of Public Housing to Project-Based Rental Assistance or Project-Based Vouchers under RAD. HHA is now looking at an overall repositioning plan that would incorporate the following Section 18 : Removal of HHA Stewart Homes (132 units) via Section 18 Physical Obsolescence; Removal of 37 “scattered site units” via Section 18 Scattered Sites; Removal of the remaining inventory (197units) via the RAD/Section 18 Small PHA Close-out Blend. If for whatever reason Stewart Homes is not approved under Section 18 Obsolescence, we would then convert under the RAD/Section 18 Construction Blend, where we would be eligible for 90% TPVs.</p> <p>Project-Based Vouchers. HHA's repositioning strategy will involve project based vouchers. HHA may also consider additional project basing vouchers as part of future new development of additional affordable units on existing HHA public housing sites after public housing repositioning . Finally, project basing vouchers in other Helena area community housing will be considered as part of HHA's strategy to fully utilize its vouchers to best address Helena area housing needs. HHA will continue to look to use PBV as a strategy to address extremely tight rental market conditions negatively impacting voucher utilization including targeting PBV at housing needs of households who are homeless and/or unstably housed, persons with disabilities, and elderly persons including Permanent Supportive Housing . HHA will apply for additional vouchers if available when HHA is eligible and competitive.</p> <p>Units with Approved Vacancies for Modernization. HHA will continue to perform modernization and rehabilitation and address critical needs to ensure quality housing. HHA, as needed, may request units for HUD approved vacancies for modernization to allow for extraordinary maintenance/renovation issues, and to allow 504 accessibility improvements.</p>
B.3	<p>Progress Report. Provide a description of the PHA s progress in meeting its Mission and Goals described in the PHA 5-Year and Annual Plan.</p> <p>Goal 1: HHA is continuing to work closely with its residents, city and county local government, state government, community partners, and interested community members in developing its repositioningstrategy and plan. HHA has nearly completed Physical Condition Assessments, Obsolescence evaluations, environmental reviews, and other appropriate physical capital needs assessment of all 366 of itslow-rent public housing units to develop an overall HHA public housing portfolio repositioning redevelopment strategy. HHA is now looking at an overall repositioning plan that would incorporate thefollowing: Removal of HHA Stewart Homes (132 units) via Section 18 Physical Obsolescence; Removal of 37 “scattered site units” via Section 18 Scattered Sites; Removal of the remaining inventory (197units) via the RAD/Section 18 Small PHA Close-out Blend. These actions would allow HHA to maximize the number of Section 18 units (346 units) vis-à-vis RAD units (20 units). RAD/Section 18 Blends.(If for whatever reason Stewart Homes is not approved under Section 18 Obsolescence, we would then convert under the RAD/Section 18 Construction Blend, where we would be eligible for 90% TPVs.)Physical assessments of all properties are completed with more detailed improvements planning being nearly completed. HHA has completed preliminary infrastructure and housing developmentfeasibility planning for building upwards of 100 new affordable homes on existing public housing properties. HHA helped develop a successful MT statewide FMR appeal leading to the approval ofsignificantly higher FMRs allowing voucher holders to have a better opportunities to rent safe, decent affordable homes using their vouchers. . HHA organizes regular outreach to its landlord communityas well Goal 2: Promote and Secure Services for Housing Authority Residents, Participants, and Applicants. HHA has maintained service partnerships in HHA facilities providing childcare and childdevelopment services , along with mental health and disability services, and other health care services.. HHA has on-site in HHA facilities Head Start classrooms, other on-site child care, and a certifiedcommunity behavioral health center . HHA helps lead a Housing is Healthcare partnership to link residents to necessary health care and support services. HHA generally works to foster workingpartnerships between its housing programs and service providers including disability service providers, the local hospital health care system , and two federally qualified health centers . HHA is looking tobetter incorporate services with its housing as part of its redevelopment efforts including dedicated Permanent Supportive Housing to help support successful community living for all. HHA works with itslocal food bank on delivering food at its locations Goal 3 Utilize Housing Authority Resources in a Fiscally Responsible, Legal, Ethical, Coordinated, and Results Oriented Fashion. HHA has maintainedclean audits year in and out. HHA has consistent strong high performing PHAS scores, and and strong SEMAP scores- HHA is working to address payment standards to increase voucher success rates andvoucher utilization. HHA has been able to retain and attract high quality employees maintaining competitive wages and benefits , supporting performance based pay increases , training, and internal professional growth opportunities. Employee surveys have documented that HHA maintains and positive, supportive work environment. HHA exceeds its Section 3 hiring goals with many of our long term employees enjoying lasting economic opportunities from this focus. HHA has adopted new cloud based phone and IT systems improving quality at lower costs. HHA carefully evaluates it health insurance and other benefits to maximize benefits to costs, and carefully reviews it commercial insurance to keep down costs.</p>
B.4	<p>Capital Improvements. Include a reference here to the most recent HUD-approved 5-Year Action Plan in EPIC and the date that it was approved. Capital Fund 5 Year Action Plan for 2024 through 2028 in EPIC approved by HUD on 07/02/2024.</p>
B.5	<p>Most Recent Fiscal Year Audit. (a) Were there any findings in the most recent FY Audit? Y <input type="checkbox"/> N <input checked="" type="checkbox"/> (b) If yes, please describe:</p>
C.	<p>Other Document and/or Certification Requirements.</p>

C.1	Resident Advisory Board (RAB) Comments. (a) Did the RAB(s) have comments to the PHA Plan? Y <input checked="" type="checkbox"/> N <input type="checkbox"/> (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.
C.2	Certification by State or Local Officials. <u>Form HUD 50077-SL</u> , <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.
C.3	Civil Rights Certification/ Certification Listing Policies and Programs that the PHA has Revised since Submission of its Last Annual Plan. 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.
C.4	Challenged Elements. 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. (a) Did the public challenge any elements of the Plan? Y <input type="checkbox"/> N <input checked="" type="checkbox"/> If yes, include Challenged Elements.
C.5	Troubled PHA. (a) Does the PHA have any current Memorandum of Agreement, Performance Improvement Plan, or Recovery Plan in place? Y <input type="checkbox"/> N <input type="checkbox"/> N/A <input checked="" type="checkbox"/> (b) If yes, please describe:
D.	Affirmatively Furthering Fair Housing (AFFH).
D.1	Affirmatively Furthering Fair Housing (AFFH). 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.

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 5-Year and Annual PHA Plan.

Public reporting burden for this information collection is estimated to average 7.52 hours per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. HUD may not collect this information, and respondents are not required to complete this form, unless it displays a currently valid OMB Control Number.

Privacy Act Notice. The United States Department of Housing and Urban Development is authorized to solicit the information requested in this form by virtue of Title 12, U.S. Code, Section 1701 et seq., and regulations promulgated 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.

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