

PHA Plans for the Marion County Housing Authority Annual Plan for FYB 2027

Jason Icenbice, Executive Director

FYB January 1, 2027

FIRST DRAFT

DRAFT



Presented by:

The **Nelrod** Company

**3301 West Fwy.
Fort Worth, Texas 76107
(817) 922-9000/FAX (817) 922-9100**

Satellite Offices: Washington, D.C.; Houston, TX

E-Mail Address: info@nelrod.com

www.nelrod.com

Web Site:

**Streamlined Annual
PHA Plan
(HCV Only PHAs)**

**U.S. Department of Housing and Urban
Development
Office of Public and Indian Housing**

**OMB No. 2577-0226
Expires 09/30/2027**

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. 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 higher performer on both of the most recent Public Housing Assessment System (PHAS) and Section Eight Management 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 or manages less than 250 public housing units and any number of vouchers where the total combined units exceeds 550.
- (3) **Housing Choice Voucher (HCV) Only PHA** – A PHA that administers more the 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 exceeds 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	PHA Name: <u>Marion County Housing Authority</u> PHA Code: <u>OR014</u> PHA Plan for Fiscal Year Beginning: (MM/YYYY): <u>01/2027</u> PHA Inventory (Based on Annual Contributions Contract (ACC) units at time of FY beginning above) Number of Housing Choice Voucher (HCVs): <u>1218</u> Number of VASH Vouchers: <u>35</u> Total Combined Vouchers: <u>1253</u> PHA Submission Type: ☒ Annual Submission ☐ Revised Annual Submission Availability of Information. 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 following are the specific locations where the public may obtain copies of the 2027 Annual PHA Plan: ▪ Administrative Office – 2645 Portland Rd., NE Suite 200, Salem, OR 97301 ▪ PHA Website: www.co.marion.or.us ☐ PHA Consortia: (Check box if submitting a joint PHA Plan and complete table below) <table border="1" style="width: 100%; border-collapse: collapse; margin-top: 10px;"> <thead> <tr> <th rowspan="2">Participating PHAs</th> <th rowspan="2">PHA Code</th> <th rowspan="2">Program(s) in the Consortia</th> <th rowspan="2">Programs Not in the Consortia</th> <th colspan="2">No. of Units in Each Program</th> </tr> <tr> <th>PH</th> <th>HCV</th> </tr> </thead> <tbody> <tr> <td>Lead HA:</td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table>	Participating PHAs	PHA Code	Program(s) in the Consortia	Programs Not in the Consortia	No. of Units in Each Program		PH	HCV	Lead HA:																							
Participating PHAs	PHA Code					Program(s) in the Consortia	Programs Not in the Consortia	No. of Units in Each Program																									
		PH	HCV																														
Lead HA:																																	

B	Plan Elements
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): Housing Needs and Strategy for Addressing Housing Needs <u>Statement of Housing Needs:</u> <u>Assessment of Housing Needs</u> Marion County Housing Authority (MCHA) reviewed the State of Oregon's 2026-2030 Consolidated Plan and the 2016-2020 Analysis of Impediments to Fair Housing Choice. MCHA actively participated in the 2026-2030 planning process and used insights from that engagement to shape our waiting list management strategies and to better assess the unique housing needs of rural communities in our jurisdiction. Looking ahead, MCHA intends to participate in the next Consolidated Plan process. This involvement will provide an opportunity to further educate staff on evolving housing needs and ensure that our program design and outreach efforts remain responsive and equitable. The information gathered will directly inform our policy development, resource targeting, and coordination with partner agencies. <u>Housing Needs Identified by MCHA:</u> 1. Additional affordable housing units and preservation of existing rental stock 2. Better linkage between housing and supportive services, particularly for family reunification 3. Greater support for elderly residents to maintain independence

B.1

4. Expanded opportunities for homeownership
5. Increased availability of decent, safe, and affordable housing
6. Broader assisted housing choices for low-income households
7. Enhancements to community quality of life and neighborhood vitality
8. Strengthened programs promoting self-sufficiency and asset development
9. Continued efforts to ensure equal access and opportunity in housing
10. A focused strategy to end chronic homelessness in Marion County

Marion County Housing Authority revised its inspection policy to transition from biennial inspections to annual inspections for Housing Choice Voucher assisted units. This change is intended to support housing quality, ensure compliance with HUD requirements, and identify health and safety deficiencies in a more timely manner.

Waiting List for Section 8

Total: 415

Extremely Low Income: 186-45%

Very Low Income: 0-0%

Low Income: 0-0%

Families with children: 115-28%

Elderly Families: 46-11%

Families with Disabilities: 146-35%

White: 327-79%

Black/African American: 83-20%

Asian: 50-12%

Hispanic: 84-20%

The waiting list closed on 8/15/26. The PHA **does** expect to reopen the waiting list in the PHA Plan year.

Waiting List for Section 8 - Twilight

Total: 377

Extremely Low Income: 127-34%

Very Low Income: 0-0%

Low Income: 0-0%

Families with children: 112-30%

Elderly Families: 33-9%

Families with Disabilities: 145-38%

White: 303-80%

Black/African American: 60-16%

Asian: 58-15%

Hispanic: 64-17%

B.1

The waiting list closed on 8/15/26. The PHA **does** expect to reopen the waiting list in the PHA Plan year.

Waiting List for Section 8 - Colonial

Total: 365

Extremely Low Income: 295-81%

Very Low Income: 0-0%

Low Income: 0-0%

Families with children: 108-30%

Elderly Families: 28-8%

Families with Disabilities: 132-36%

White: 285-78%

Black/African American: 66-18%

Asian: 59-16%

Hispanic: 82-22%

The waiting list closed on 8/15/26. The PHA **does** expect to reopen the waiting list in the PHA Plan year.

Deconcentration and Other Policies that Govern Eligibility, Selection and Admissions

Preferences:

Special Programs Preference: Priority 2

This program encompasses any family with a household member who is currently receiving services from a Marion County administered program including: Marion County Health Department (including all sub-programs), Marion County Parole & Probation, Marion County Juvenile Department, and Marion County Victims Services. In order to be considered eligible for admission to this Special Program, the participant must be referred in writing by an authorized representative of the Marion County program where they are enrolled. The authorized representative must verify that the individual lacks a viable, affordable, and stable permanent housing option at the time of referral. In accordance with HUD regulations, MCHA will not limit the source of referrals for this program to any agency, organization, or consortia that denies its services to member of any Federally protected class under fair housing laws, i.e., race, color, religion, national origin, sex, disability, or familial status.

Rent Burdened Households: Priority 3

Households living in rural Marion County. Households would be considered rent burdened if A) they had been issued a non-payment of rent notice in the past six months, or B) the households pay more than 50% of their income towards rent and utilities.

B.1 Residency Preference: Priority 4

Families receive a residency preference if they live, work or have been hired to work in the jurisdiction of Marion County Housing Authority. MCHA's jurisdiction includes all of Marion County OUTSIDE the Urban Growth Boundary of Salem and Keizer. Note: This does not include the City of Salem, the City of Keizer, or the Urban Growth Boundary. Applicants who are incarcerated at the time of application (whether or not the address of the correctional institution is within MCHA's jurisdiction) may also be eligible for this preference if they resided in MCHA's jurisdiction prior to incarceration and plan to return to MCHA's jurisdiction after their release. Eligibility for this preference will be verified when the applicant's name comes to the top of the wait list. If the applicant's eligibility for this preference cannot be verified at the time their name comes to the top of the wait list, the applicant family will be reassigned to the appropriate preference and retains its relative place on the applicant waiting list according to the date and time that MCHA established for the original application.

Marion County Housing Authority's use of a residency preference will not have the purpose or effect of delaying or otherwise denying admission to the program based on the race, color, ethnic origin, gender, religion, disability, or age of any member of an applicant family.

In order to verify that family meets the residency preference; MCHA will require a minimum of 1 of the following documents at the time their name comes to the top of the wait list:

- Current Oregon Driver's License or Identification Card
- Current Rent Receipts
- Current Lease Agreement
- Utility Bills
- Employer or Agency Records including Paystubs
- School Records

Homelessness Preference: Priority 5

In order to be eligible for the homelessness preference, individuals and families must meet the HUD definition of homelessness as outlined in 24 CFR 91.5 in either Category I or Category 4 of the homeless definition at the time their name comes to the top of the wait list. The applicant must be either currently homeless in Marion County or demonstrate that a significant portion of their homelessness has been spent in Marion County. If the applicant's eligibility for this preference cannot be verified at the time their name comes to the top of the wait list, the applicant family will be reassigned to the appropriate preference and retains its relative place on the applicant waiting list according to the date and time that MCHA established for the original application.

Category 1: Defined as being in a current state of lacking a fixed, regular, and adequate nighttime residence meaning:

- i. An individual or family with a primary nighttime residence that is a public or private place not designed for or ordinarily used as a regular sleeping accommodation for human beings, including a car, park, abandoned building, bus or train station, airport, or camping ground; or

B.1	ii. An individual or family living in a supervised publicly or privately operated shelter designated to provide temporary living arrangements (including congregate shelters, transitional housing, and hotels and motels paid for by charitable organizations or by federal, state, or local government programs for low-income individuals); or iii. An individual who is exiting an institution where he or she resided for 90 days or less and who resided in an emergency shelter or place not meant for human habitation immediately before entering that institution. Category 4: Any individual or family who: i. Is fleeing, or is attempting to flee, domestic violence, dating violence, sexual assault, stalking, or other dangerous or life-threatening conditions that relate to violence against the individual or a family member, including a child, that has either taken place within the individual's or family's primary nighttime residence or has made the individual or family afraid to return to their primary nighttime residence; and ii. Has no other residence; and iii. Lacks the resources or support networks, e.g., family, friends, faith-based or other social networks, to obtain other permanent housing. In order to be considered eligible for a homelessness preference, written verification must be provided of the individual's homeless status in accordance with HUD's established guidelines for recordkeeping and homeless verification, outlined in order of preference below: For Category 1 homelessness: 1) Evidence of current living situation may be documented by a written referral by a housing or service provider (such as emergency shelters, institutional care facilities, police officers, business owners, etc.) that demonstrates the individual or head of household's homeless status; or 2) Evidence of the current living situation may be documented by a written observation of an outreach worker; or 3) When a written observation by an outreach worker or third-party referral is not available, homelessness may be documented through a signed statement by the applicant verifying his or her homeless status. This self-declaration must include evidence of the efforts made to obtain third-party evidence as well as documentation of the severity of the situation in which the individual or head of household has been living. 4) For individuals who are exiting an institution where he or she resided for 90 days or less and who resided in an emergency shelter or place not meant for human habitation immediately before entering that institution, the applicant must submit discharge paperwork or a written referral from a social worker, case manager, or other appropriate official of the institution, stating the beginning and end dates of the time residing in the institution that demonstrate the person resided there for 90 days or less, and evidence that the individual was homeless and living in a place not meant for human habitation, a safe haven, or in an emergency shelter, and met the criteria in paragraph (1) of the definition for chronically homeless in 24 CFR 578.3, immediately prior to entry into the institutional care facility.
-----	---

B.1 For Category 4 homelessness:

- 1) Written self-certification from the individual or family member that they are fleeing/attempt to flee domestic violence, dating violence, sexual assault, stalking, or other dangerous or life-threatening conditions that relate to violence against the individual or a family member AND, if it causes no additional threat to safety, supported by a Third Party written referral source from whom assistance was sought for domestic violence, OR Intake worker observation (need only contain minimum amount of information necessary); and
- 2) Self-certification from the individual that they have no subsequent residence, housing resources or support networks which they could access to obtain permanent housing.

Applicants with a verified and documented homeless preference shall be referred to MCHA by a qualified housing provider:

A qualified provider meets all of the following criteria:

1. Is a nonprofit tax-exempt 501(c)3 corporation or a division of local government;
2. Has as part of its mission providing services to very low income and homeless households in Marion County;
3. Offers one or more of the following services to its clients, residents, or program participants:
 - a. Time-limited shelter or transitional housing program(s) for homeless individuals or families;
 - b. Service-enriched programs for very low-income and homeless households;

The term, "service-enriched permanent housing programs," refers to programs that:

- i. Provide supportive services designed to assist homeless or very low income or disabled residents in maintaining their housing and increasing their self-sufficiency (e.g., mental health or chemical addiction counseling, job counseling or training and referral, etc.)
- ii. Case-management services to very low-income persons with disabilities; or
- iii. Case-management for homeless households to assist them in securing and stabilizing in permanent housing, including follow-up case management services for a period of at least six months following placement in housing.

Reassignment of Preference

An applicant who has either low or no preference may be reassigned to a higher preference category if, at any time during their time on the wait list the applicant can document, and MCHA can verify, that a change in circumstance occurred to merit such preference. The applicant's new rank on the waiting list after a preference is granted will be based on the date and time the original application was received. If an eligible preference family is determined to be qualified for a lower preference, the applicant family is assigned to the appropriate preference and retains its relative place on the applicant waiting list according to the date and time that MCHA established for the original application.

B.1 PHA deleted the following preference:

*Beachie Creek/Lionshead Fire Evacuee's: Priority 1
Households displaced by the Beachie Creek and Lionshead fire Evacuees Priority. This preference will sunset after 100 vouchers have been issued.*

Financial Resources

Financial Resources: Planned Sources and Uses		
Sources	Planned \$	Planned Uses
1. Federal Grants (FY 2027 grants)		
a) Public Housing Operating Fund		
b) Public Housing Capital Fund		
c) HOPE VI Revitalization		
d) HOPE VI Demolition		
e) Annual Contributions for Section 8 Tenant-Based Assistance	12,000,000.00	
f) Resident Opportunity and Self-Sufficiency Grants	100,000.00	
g) Community Development Block Grant		
h) HOME		
Other Federal Grants (list below)		
Section 8 N/C S/R	400,000.00	Project expenses
2. Prior Year Federal Grants (unobligated funds only) (list below)		
3. Public Housing Dwelling Rental Income		
4. Other income (list below)		
HCV Admin Fee	1,200,000.00	
5. Non-federal sources (list below)		
Rent Revenue	3,300,000.00	Project expenses
Total resources	\$17,000,000.00	

B.1

Operation and Management

HUD Programs Under PHA Management:

Program Name	Units or Families Served at Year Beginning	Expected Turnover
Public Housing	N/A	N/A
Section 8 Vouchers	860	70-80
Section 8 Certificates	N/A	N/A
Section 8 Mod Rehab	N/A	N/A
Special Purpose Section 8 Certificates/Vouchers (list individually)	N/A	N/A
Other Federal Programs (list individually)	VASH 35	3-5

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

Family Self-Sufficiency Programs:

Family Self Sufficiency (FSS) Participation		
Program	Required Number of Participants	Actual Number of Participants (As of: 07/15/2026)
Public Housing	N/A	N/A
Section 8	0	0

B.2

New Activities.

(a) Does the PHA intend to undertake any new activities related to the following in the PHA's current Fiscal Year?

Project-Based Vouchers.

Y ☒ N ☐

(b) If this activity is planned for the current Fiscal Year, describe the activities. Provide the projected number of project-based units and general locations and describe how project-basing would be consistent with the PHA Plan.

Marion County Housing Authority is continuing implementation of its previously approved Project-Based Voucher commitment for the Farmdale Apartments redevelopment in Woodburn, Oregon. The FY 2026 PHA Plan identified MCHA's intent to project-base up to 25 Housing Choice Vouchers at Farmdale, and MCHA subsequently entered into an Agreement to Enter into a Housing Assistance Payments Contract (AHAP) for the project.

Construction of the Farmdale Apartments is expected to continue during FY 2027. MCHA anticipates execution of the final Project-Based Voucher Housing Assistance Payments (HAP) Contract following completion of applicable construction, inspection, and program requirements, with PBV-assisted occupancy commencing in 2027 and/or 2028. The project is expected to include up to 25 PBV-assisted units.

The Farmdale PBV commitment is consistent with MCHA's Five-Year Plan goals to expand the supply of assisted housing, preserve and develop affordable housing, increase assisted housing choices, and leverage public and private resources to create additional housing opportunities.

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.

MISSION

To make Marion County a better place to live by developing, administering, and maintaining safe, decent, affordable housing to those individuals or families that reside within the county.

PHA GOAL #1: EXPAND THE SUPPLY OF ASSISTED HOUSING

The PHA established the following objectives to strive in meeting goal #1:

- Leverage private or other public funds to create additional housing opportunities
- Expand Project-Based Voucher Program
- Seek opportunities to leverage Section 32 funding to acquire or develop units

Progress Statement:

MCHA continues to explore funding partnerships and development opportunities to expand affordable housing. The agency is also pursuing opportunities to expand the Project-Based Voucher Program and reviewing options to acquire or develop additional units.

PHA GOAL #2: IMPROVE THE QUALITY OF ASSISTED HOUSING

The PHA established the following objectives to strive in meeting goal #2:

- Improve voucher management (SEMAP score)
- Increase customer satisfaction
- Concentrate on efforts to improve specific management functions (e.g., voucher unit inspections)

Progress Statement:

MCHA is currently reviewing program procedures, monitoring SEMAP performance, improving inspection processes, and strengthening communication with participants and landlords to help attain these goals.

PHA GOAL #3: INCREASE ASSISTED HOUSING CHOICES

The PHA established the following objectives to strive in meeting goal #3

- Conduct outreach efforts to potential voucher landlords
- Increase voucher payment standards
- Based on community needs, consider preferences for special populations
- Encourage households to use vouchers in our jurisdiction by connecting them with available resources while also utilizing an appropriate portability policy

Progress Statement:

MCHA is conducting landlord outreach, using Small Area Fair Market Rents to maintain competitive payment standards, partnering with community agencies for special preference referrals, and connecting families with local housing resources while administering portability requirements.

B.3

PHA GOAL #4: PROVIDE AN IMPROVED LIVING ENVIRONMENT

The PHA established the following objectives to strive in meeting goal #4

- Implement measures to deconcentrate poverty by bringing higher income households into lower income developments
- Implement measures to promote income mixing by assuring access for lower income families into higher income developments

Progress Statement:

MCHA is using Small Area Fair Market Rent payment standards to improve access to higher-cost neighborhoods and expanding Project-Based Voucher opportunities in developments throughout rural Marion County. These efforts support greater housing choice and mixed-income communities.

PHA GOAL #5: PROMOTE SELF-SUFFICIENCY AND ASSET DEVELOPMENT OF ASSISTED HOUSEHOLDS

The PHA established the following objectives to strive in meeting goal #5

- Increase the number and percentage of employed persons in assisted families
- Provide or attract supportive services to improve assistance recipients' employability
- Provide or attract supportive services to increase independence for the elderly or families with disabilities
- Increase FSS Program participation
- Promote homeownership activities and opportunities
- Provide annual homebuyer training course
- Partner with local agency to provide individual development account to FSS participants

Progress Statement:

MCHA continues to operate its Family Self-Sufficiency and HCV Homeownership programs, connect participants with employment and supportive services, and partner with organizations such as DevNW for homebuyer education and financial readiness. Staff also promote FSS enrollment and support elderly and disabled households through referrals to local service providers.

PHA GOAL #6: ENSURE EQUAL OPPORTUNITY AND AFFIRMATIVELY FURTHER FAIR HOUSING

The PHA established the following objectives to strive in meeting goal #6

- Undertake affirmative measures to ensure access to assisted housing regardless of race, color, religion, national origin, sex, familial status, and disability
- Undertake affirmative measures to provide a suitable living environment for families living in assisted housing, regardless of race, color, religion, national origin, sex, familial status and disability
- Undertake affirmative measures to ensure accessible housing to persons with all varieties of disabilities regardless of unit size required

Progress Statement:

MCHA continues to provide fair housing information, language assistance, and reasonable accommodation options throughout the application and participation process. Staff work with landlords and community partners to help families locate accessible units and ensure equal access to housing assistance regardless of protected status.

B.4	Capital Improvements. <i>Not Applicable</i>
B.5	Most Recent Fiscal Year Audit. (a) Were there any findings in the most recent FY Audit? Y N ☐ ☒ (b) If yes, please describe: <i>N/A</i>
C.	Other Document and/or Certification Requirements.
C.1	Resident Advisory Board (RAB) Comments. (a) Did the RAB(s) provide comments to the PHA Plan? <i>(See attachment 014a01)</i> Y N ☐ ☐ (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. Form HUD 50077-SL, <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 N ☐ ☐ If yes, include Challenged Elements.