

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

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# **NEW BEDFORD HOUSING AUTHORITY PLANS**

**5 Year Plan for Fiscal Years 2003 - 2007  
Annual Plan for Fiscal Year 2003**

**NOTE: THIS PHA PLANS TEMPLATE (HUD 50075) IS TO BE COMPLETED IN  
ACCORDANCE WITH INSTRUCTIONS LOCATED IN APPLICABLE PIH NOTICES**

## PHA Plan Agency Identification

**PHA Name:** New Bedford Housing Authority

**PHA Number:** MA007

**PHA Fiscal Year Beginning: (mm/yyyy)** 01/2003

### Public Access to Information

**Information regarding any activities outlined in this plan can be obtained by contacting: (select all that apply)**

- Main administrative office of the PHA
- PHA development management offices
- PHA local offices

### Display Locations For PHA Plans and Supporting Documents

The PHA Plans (including attachments) are available for public inspection at: (select all that apply)

- Main administrative office of the PHA
- PHA development management offices
- PHA local offices
- Main administrative office of the local government
- Main administrative office of the County government
- Main administrative office of the State government
- Public library
- PHA website
- Other (list below)

*City Hall: City Clerk's Office*

PHA Plan Supporting Documents are available for inspection at: (select all that apply)

- Main business office of the PHA
- PHA development management offices
- Other (list below)

**5-YEAR PLAN**  
**PHA FISCAL YEARS 2003 - 2007**  
[24 CFR Part 903.5]

**A. Mission**

State the PHA's mission for serving the needs of low-income, very low income, and extremely low-income families in the PHA's jurisdiction. (select one of the choices below)

- The mission of the PHA is the same as that of the Department of Housing and Urban Development: To promote adequate and affordable housing, economic opportunity and a suitable living environment free from discrimination.
- The PHA's mission is: (state mission here)

**B. Goals**

The goals and objectives listed below are derived from HUD's strategic Goals and Objectives and those emphasized in recent legislation. PHAs may select any of these goals and objectives as their own, or identify other goals and/or objectives. Whether selecting the HUD-suggested objectives or their own, **PHAS ARE STRONGLY ENCOURAGED TO IDENTIFY QUANTIFIABLE MEASURES OF SUCCESS IN REACHING THEIR OBJECTIVES OVER THE COURSE OF THE 5 YEARS.** (Quantifiable measures would include targets such as: numbers of families served or PHAS scores achieved.) PHAs should identify these measures in the spaces to the right of or below the stated objectives.

**HUD Strategic Goal: Increase the availability of decent, safe, and affordable housing.**

- PHA Goal: Expand the supply of assisted housing  
Objectives:
- Apply for additional rental vouchers: *50 vouchers - received*
  - Reduce public housing vacancies: *Reduce by 5% - reduced*
  - Leverage private or other public funds to create additional housing opportunities:
  - Acquire or build units or developments
  - Other (list below)
- PHA Goal: Improve the quality of assisted housing  
Objectives:
- Improve public housing management: (PHAS score) 100% *ongoing*
  - Improve voucher management: (SEMAP score) 100% *ongoing*
  - Increase customer satisfaction: *ongoing*
  - Concentrate on efforts to improve specific management functions: (list; e.g., public housing finance; voucher unit inspections) *Computer Services - ongoing*
  - Renovate or modernize public housing units: *600 Units Abate Lead Paint - completed*

- Demolish or dispose of obsolete public housing:
- Provide replacement public housing:
- Provide replacement vouchers:
- Other: (list below)

PHA Goal: Increase assisted housing choices

Objectives:

- Provide voucher mobility counseling: *ongoing*
- Conduct outreach efforts to potential voucher landlords *25 New Landlords - ongoing*
- Increase voucher payment standards by *10% - increased*
- Implement voucher homeownership program: *ongoing*
- Implement public housing or other homeownership programs:
- Implement public housing site-based waiting lists:
- Convert public housing to vouchers:
- Other: (list below)

**HUD Strategic Goal: Improve community quality of life and economic vitality**

PHA Goal: Provide an improved living environment

Objectives:

- Implement measures to deconcentrate poverty by bringing higher income public housing households into lower income developments: *ongoing*
- Implement measures to promote income mixing in public housing by assuring access for lower income families into higher income developments: *ongoing*
- Implement public housing security improvements: *ongoing*
- Designate developments or buildings for particular resident groups (elderly, persons with disabilities)
- Other: (list below)  
Designate Caroline Street, MA-10, site HOPE VI grant work, as Elderly Only. *Completed - received notification October 3, 2001.*

**HUD Strategic Goal: Promote self-sufficiency and asset development of families and individuals**

PHA Goal: Promote self-sufficiency and asset development of assisted households

Objectives:

- Increase the number and percentage of employed persons in assisted families: *ongoing*

- Provide or attract supportive services to improve assistance recipients' employability: *ongoing*
- Provide or attract supportive services to increase independence for the elderly or families with disabilities. *ongoing*
- Other: (list below)

**HUD Strategic Goal: Ensure Equal Opportunity in Housing for all Americans**

- PHA Goal: Ensure equal opportunity and affirmatively further fair housing  
Objectives:
  - Undertake affirmative measures to ensure access to assisted housing regardless of race, color, religion national origin, sex, familial status, and disability: *ongoing*
  - 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: *ongoing*
  - Undertake affirmative measures to ensure accessible housing to persons with all varieties of disabilities regardless of unit size required: *ongoing*
  - Other: (list below)

**Other PHA Goals and Objectives: (list below)**

**Annual PHA Plan**  
**PHA Fiscal Year 2003**  
[24 CFR Part 903.7]

**i. Annual Plan Type:**

Select which type of Annual Plan the PHA will submit.

**Standard Plan**

**Streamlined Plan:**

- High Performing PHA**  
 **Small Agency (<250 Public Housing Units)**  
 **Administering Section 8 Only**

**Troubled Agency Plan**

**ii. Executive Summary of the Annual PHA Plan**

[24 CFR Part 903.7 9 (r)]

Provide a brief overview of the information in the Annual Plan, including highlights of major initiatives and discretionary policies the PHA has included in the Annual Plan.

*The Quality Housing and Work Responsibility Act of 1998 (QHWRA) was signed by President Clinton on October 21, 1998. QHWRA is Title V of HUD'S FY 1999 appropriations act (P.L. 105-276).*

*QHWRA is landmark legislation which will make public housing reform a reality by:*

- reducing the concentration of poverty in public housing;*
- protecting access to housing assistance for the poorest families;*
- supporting families making transition from welfare to work;*
- raising performance standards for public housing agencies, and rewarding high performance;*
- merging and reforming the Section 8 certificate and voucher programs, and allowing the public housing agencies to implement homeownership programs.*

*The recently enacted law makes important changes to the operations and programs of public housing and tenant-based assistance. These changes are designed to revitalize and improve HUD's public housing and tenant-based assistance programs. One of the most important changes made by QHWRA is the introduction of the public housing agency plans – a five-year plan and an annual plan. The five-year plan describes the mission of the PHA and the PHA's long-range goals and objectives for achieving its mission over the subsequent five years. The annual plan provides details about the PHA's strategy for handling operational concerns, residents' concerns and needs, programs, and services for the upcoming fiscal year. Both planning mechanisms require PHAs to examine their existing operations and needs and to design long-range and short-range strategies to address those needs.*

*HUD has developed an electronic template that PHAs must use to complete and submit their Five-Year and Annual Plan. Using the template, PHAs will provide responses to a number of structured questions designed to provide the most relevant data regarding local operations in a concise manner. Yet the Plan template also serves as a central reference point for very detailed information about the PHA. This is accomplished through the template's listing of required "supporting documents" that must remain on display and serve as a resource library for the community, while eliminating the need for extensive submissions to HUD. The PHA Plan template is a word processing document that will be submitted to HUD via the Internet.*

*To fulfill the Plan's role as a comprehensive statement of the PHA's policies and operations, supporting documents containing the information included in the Table of Contents of the Annual Plan is available for public review at the New Bedford Housing Authority Administrative Office.*

*The NBHA mission is the same as that of HUD: To promote adequate and affordable housing, economic opportunity, and a suitable living environment free from discrimination.*

*The low-income housing needs of New Bedford show the same needs as stated in the City's Consolidated Plan. There is a great need for households earning below 30% of the median income (MIA). To meet this need, the NBHA will target more than 75% of all Section 8 Voucher new admissions to families at or below 30% of MIA. At the same time the NBHA will give preference for public housing admission to working families and those enrolled in educational, training, or upward mobility programs in order to deconcentrate poverty and have an income mix at targeted developments. Public Housing residents will have the option of paying income-based rents or flat rents (ceiling rents) to eliminate rent increases that penalize residents who obtain employment. Minimum rents will be \$25.00 per month but discretionary minimum rent hardship exemptions will be available.*

*The QHWRA consolidates current funds used for modernization and capital improvement into a Capitol Fund, which can be used for the redesign, reconstruction, reconfiguration of buildings; the development of mixed-income finance projects and homeownership activities. The NBHA will continue to use its allocation to abate lead paint and modernize its family developments while doing incidental modernization at other developments with limited resources.*

*The Act gives PHAs greater discretion to evict or not admit persons who have a history of violent criminal offenses, sex offenses against children, or drug-related offenses. The NBHA will access criminal records from the local police as well as the Massachusetts CORRI as part of its screening process for eligibility for admission. The Public Housing Drug Elimination Program will expend at least 70% of its funds for PRIDE patrols in public housing neighborhoods. Police officer residents will be housed in all large family developments to create safer neighborhoods and establish an effective working relationship with the police.*

*The Housing Authority was established and funded to promote the general welfare and to assist the City in efforts to eliminate both unsafe housing conditions and the shortage of decent and safe affordable housing. It cannot be expected, alone, to provide housing for all or the majority of New Bedford's residents. Yet, this Plan, developed with the independent advise of*

*private citizens of the community, will guide the NBHA in developing housing opportunities and strengthen its neighborhoods.*

### **iii. Annual Plan Table of Contents**

[24 CFR Part 903.7 9 (r)]

Provide a table of contents for the Annual Plan, including attachments, and a list of supporting documents available for public inspection.

#### **Table of Contents**

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#### **Attachments**

Indicate which attachments are provided by selecting all that apply. Provide the attachment's name (A, B, etc.) in the space to the left of the name of the attachment. Note: If the attachment is provided as a **SEPARATE** file submission from the PHA Plans file, provide the file name in parentheses in the space to the right of the title.

#### Required Attachments:

- (C) Admissions Policy for Deconcentration (*MA007c02*)
- (D) FY2003 Capital Fund Program Annual Statement & 5-Year Action Plan (*MA007d02*)
- Most recent board-approved operating budget (Required Attachment for PHAs that are troubled or at risk of being designated troubled ONLY)

- (E) Comments of Resident Advisory Board or Boards (must be attached if not included in PHA Plan text) (MA007e02)
- (G) Pet Policy (MA007g02)
- (H) Statement of Progress in Meeting 5-Year Plan Mission and Goals (MA007h02)
- (I) Resident Membership on Board of Commissioners (MA007i02)
- (J) Resident Advisory Board Members (MA007j02)
- (M) Voluntary Conversion Initial Assessments(MA007m02)

Optional Attachments:

- PHA Management Organizational Chart
- (A) Public Housing Drug Elimination Program (PHDEP) Plan (MA007a02)
- (B) Statement of Financial Resources (MA007b02)
- (D) FY 2003 Capital Fund Program Annual Statement & 5-Year Action Plan (MA007d02)
- (F) Designate Boa Vista Elderly Only (MA007f02)
- (K) Designate Caroline Street Elderly Only (MA007k02)
- (L) Section 8 Homeownership Program (MA007l02)
- (N) Performance and Evaluation Reports (MA007n02)

**Supporting Documents Available for Review**

Indicate which documents are available for public review by placing a mark in the “Applicable & On Display” column in the appropriate rows. All listed documents must be on display if applicable to the program activities conducted by the PHA.

<b>List of Supporting Documents Available for Review</b>		
<b>Applicable &amp; On Display</b>	<b>Supporting Document</b>	<b>Applicable Plan Component</b>
X	PHA Plan Certifications of Compliance with the PHA Plans and Related Regulations	5 Year and Annual Plans
X	State/Local Government Certification of Consistency with the Consolidated Plan	5 Year and Annual Plans
X	Fair Housing Documentation: Records reflecting that the PHA has examined its programs or proposed programs, identified any impediments to fair housing choice in those programs, addressed or is addressing those impediments in a reasonable fashion in view of the resources available, and worked or is working with local jurisdictions to implement any of the jurisdictions’ initiatives to affirmatively further fair housing that require the PHA’s involvement.	5 Year and Annual Plans
X	Consolidated Plan for the jurisdiction/s in which the PHA is located (which includes the Analysis of Impediments to Fair Housing Choice (AI)) and any additional backup data to support statement of housing needs in the jurisdiction	Annual Plan: Housing Needs
X	Most recent board-approved operating budget for the public housing program	Annual Plan: Financial Resources;

<b>List of Supporting Documents Available for Review</b>		
<b>Applicable &amp; On Display</b>	<b>Supporting Document</b>	<b>Applicable Plan Component</b>
X	Public Housing Admissions and (Continued) Occupancy Policy (A&O), which includes the Tenant Selection and Assignment Plan [TSAP]	Annual Plan: Eligibility, Selection, and Admissions Policies
X	Section 8 Administrative Plan	Annual Plan: Eligibility, Selection, and Admissions Policies
X	Public Housing Deconcentration and Income Mixing Documentation: 1. PHA board certifications of compliance with deconcentration requirements (section 16(a) of the US Housing Act of 1937, as implemented in the 2/18/99 <i>Quality Housing and Work Responsibility Act Initial Guidance; Notice</i> and any further HUD guidance) and 2. Documentation of the required deconcentration and income mixing analysis	Annual Plan: Eligibility, Selection, and Admissions Policies
X	Public housing rent determination policies, including the methodology for setting public housing flat rents <input checked="" type="checkbox"/> check here if included in the public housing A & O Policy	Annual Plan: Rent Determination
X	Schedule of flat rents offered at each public housing development <input checked="" type="checkbox"/> check here if included in the public housing A & O Policy	Annual Plan: Rent Determination
X	Section 8 rent determination (payment standard) policies <input checked="" type="checkbox"/> check here if included in Section 8 Administrative Plan	Annual Plan: Rent Determination
X	Public housing management and maintenance policy documents, including policies for the prevention or eradication of pest infestation (including cockroach infestation)	Annual Plan: Operations and Maintenance
X	Public housing grievance procedures <input checked="" type="checkbox"/> check here if included in the public housing A & O Policy	Annual Plan: Grievance Procedures
X	Section 8 informal review and hearing procedures <input checked="" type="checkbox"/> check here if included in Section 8 Administrative Plan	Annual Plan: Grievance Procedures
X	The HUD-approved Capital Fund/Comprehensive Grant Program Annual Statement (HUD 52837) for the active grant year	Annual Plan: Capital Needs
	Most recent CIAP Budget/Progress Report (HUD 52825) for any active CIAP grant	Annual Plan: Capital Needs
X	Most recent, approved 5 Year Action Plan for the Capital Fund/Comprehensive Grant Program, if not included as an attachment (provided at PHA option)	Annual Plan: Capital Needs
X	Approved HOPE VI applications or, if more recent, approved or submitted HOPE VI Revitalization Plans or any other approved proposal for development of public housing	Annual Plan: Capital Needs

<b>List of Supporting Documents Available for Review</b>		
<b>Applicable &amp; On Display</b>	<b>Supporting Document</b>	<b>Applicable Plan Component</b>
X	Approved or submitted applications for demolition and/or disposition of public housing	Annual Plan: Demolition and Disposition
X	Approved or submitted applications for designation of public housing (Designated Housing Plans)	Annual Plan: Designation of Public Housing
N/A	Approved or submitted assessments of reasonable revitalization of public housing and approved or submitted conversion plans prepared pursuant to section 202 of the 1996 HUD Appropriations Act	Annual Plan: Conversion of Public Housing
	Approved or submitted public housing homeownership programs/plans	Annual Plan: Homeownership
X	Policies governing any Section 8 Homeownership program <input checked="" type="checkbox"/> check here if included in the Section 8 Administrative Plan	Annual Plan: Homeownership
X	Any cooperative agreement between the PHA and the TANF agency	Annual Plan: Community Service & Self-Sufficiency
X	FSS Action Plan/s for public housing and/or Section 8	Annual Plan: Community Service & Self-Sufficiency
X	Most recent self-sufficiency (ED/SS, TOP or ROSS or other resident services grant) grant program reports	Annual Plan: Community Service & Self-Sufficiency
X	The most recent Public Housing Drug Elimination Program (PHEDEP) semi-annual performance report for any open grant and most recently submitted PHDEP application (PHDEP Plan)	Annual Plan: Safety and Crime Prevention
X	The most recent fiscal year audit of the PHA conducted under section 5(h)(2) of the U.S. Housing Act of 1937 (42 U.S.C. 1437c(h)), the results of that audit and the PHA's response to any findings	Annual Plan: Annual Audit
N/A	Troubled PHAs: MOA/Recovery Plan	Troubled PHAs
X	Other supporting documents (optional) Voluntary Conversion Initial Assessments	Annual Plan: Conversion of Public Housing (#10.B)

## **1. Statement of Housing Needs**

[24 CFR Part 903.7 9 (a)]

### **A. Housing Needs of Families in the Jurisdiction/s Served by the PHA**

Based upon the information contained in the Consolidated Plan/s applicable to the jurisdiction, and/or other data available to the PHA, provide a statement of the housing needs in the jurisdiction by completing the following table. In the "Overall" Needs column, provide the estimated number of renter families that have housing needs. For the remaining characteristics, rate the impact of that factor on the housing needs for each family type, from 1 to 5, with 1 being "no impact" and 5 being "severe impact." Use N/A to indicate that no information is available upon which the PHA can make this assessment.

Housing Needs of Families in the Jurisdiction by Family Type							
Family Type	Overall	Afford-ability	Supply	Quality	Access-ibility	Size	Loca-tion
Income <= 30% of AMI	3,766	5	4	3	3	3	2
Income >30% but <=50% of AMI	2,281	5	4	3	3	3	2
Income >50% but <80% of AMI	609	5	4	3	3	3	2
Elderly	4,144	5	4	3	3	1	2
Families with Disabilities	N/A						
Race/Ethnicity	N/A						
Race/Ethnicity	N/A						
Race/Ethnicity	N/A						
Race/Ethnicity	N/A						

What sources of information did the PHA use to conduct this analysis? (Check all that apply; all materials must be made available for public inspection.)

- Consolidated Plan of the Jurisdiction/s  
Indicate year: 1996
- U.S. Census data: the Comprehensive Housing Affordability Strategy (“CHAS”) dataset
- American Housing Survey data  
Indicate year:
- Other housing market study  
Indicate year:
- Other sources: (list and indicate year of information)

**B. Housing Needs of Families on the Public Housing and Section 8 Tenant- Based Assistance Waiting Lists**

State the housing needs of the families on the PHA’s waiting list/s. **Complete one table for each type of PHA-wide waiting list administered by the PHA.** PHAs may provide separate tables for site-based or sub-jurisdictional public housing waiting lists at their option.

<b>Housing Needs of Families on the Waiting List</b>
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<b>Housing Needs of Families on the Waiting List</b>			
Waiting list type: (select one)			
<input type="checkbox"/>	Section 8 tenant-based assistance		
<input checked="" type="checkbox"/>	Public Housing		
<input type="checkbox"/>	Combined Section 8 and Public Housing		
<input type="checkbox"/>	Public Housing Site-Based or sub-jurisdictional waiting list (optional)		
If used, identify which development/subjurisdiction:			
	# of families	% of total families	Annual Turnover
Waiting list total	634	100.00%	
Extremely low income <=30% AMI	510	81.00%	
Very low income (>30% but <=50% AMI)	96	15.00%	
Low income (>50% but <80% AMI)	27	4.00%	
Families with children	366	58.00%	
Elderly families	22	3.00%	
Families with Disabilities	176	28.00%	
Race/ethnicity White	487	77.00%	
Race/ethnicity Black	141	22.00%	
Race/ethnicity AmInd	2	0.32%	
Race/ethnicity Hisp	284	45.00%	
Race/ethnicity Asian	4	0.63%	
Characteristics by Bedroom Size (Public Housing Only)			
1BR	226	36.00%	
2 BR	212	33.00%	
3 BR	146	23.00%	
4 BR	43	7.00%	
5 BR	7	1.00%	
5+ BR	0	0.00%	

<b>Housing Needs of Families on the Waiting List</b>	
Is the waiting list closed (select one)? <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes	
If yes:	
How long has it been closed (# of months)?	
Does the PHA expect to reopen the list in the PHA Plan year? <input type="checkbox"/> No <input type="checkbox"/> Yes	
Does the PHA permit specific categories of families onto the waiting list, even if generally closed? <input type="checkbox"/> No <input type="checkbox"/> Yes	

<b>Housing Needs of Families on the Waiting List</b>			
Waiting list type: (select one)			
<input checked="" type="checkbox"/>	Section 8 tenant-based assistance		
<input type="checkbox"/>	Public Housing		
<input type="checkbox"/>	Combined Section 8 and Public Housing		
<input type="checkbox"/>	Public Housing Site-Based or sub-jurisdictional waiting list (optional)		
If used, identify which development/subjurisdiction:			
	# of families	% of total families	Annual Turnover
Waiting list total	1049	100.00%	
Extremely low income <=30% AMI	861	82.00%	
Very low income (>30% but <=50% AMI)	167	16.00%	
Low income (>50% but <80% AMI)	21	2.00%	
Families with children	622	59.00%	
Elderly families	83	8.00%	
Families with Disabilities	354	34.00%	
Race/ethnicity White	827	79.00%	
Race/ethnicity Black	206	19.00%	
Race/ethnicity AmInd	7	1.00%	
Race/ethnicity Hisp	291	28.00%	
Race/ethnicity Asian	9	1.00%	
Characteristics by Bedroom Size (Public Housing Only)			
1BR			

Housing Needs of Families on the Waiting List			
2 BR			
3 BR			
4 BR			
5 BR			
5+ BR			
Is the waiting list closed (select one)? <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes If yes: How long has it been closed (# of months)? Does the PHA expect to reopen the list in the PHA Plan year? <input type="checkbox"/> No <input type="checkbox"/> Yes Does the PHA permit specific categories of families onto the waiting list, even if generally closed? <input type="checkbox"/> No <input type="checkbox"/> Yes			

**C. Strategy for Addressing Needs**

Provide a brief description of the PHA’s strategy for addressing the housing needs of families in the jurisdiction and on the waiting list **IN THE UPCOMING YEAR**, and the Agency’s reasons for choosing this strategy.

*By using ceiling rents in its Public Housing Program that are the same level as flat rents and are not a disincentive for continued occupancy for a family attempting to become economically self-sufficient, the NBHA expects to attract and retain approximately 120 families in Fiscal Year 2003.*

**(1) Strategies**

**Need: Shortage of affordable housing for all eligible populations**

**Strategy 1. Maximize the number of affordable units available to the PHA within its current resources by:**

Select all that apply

- Employ effective maintenance and management policies to minimize the number of public housing units off-line
- Reduce turnover time for vacated public housing units
- Reduce time to renovate public housing units
- Seek replacement of public housing units lost to the inventory through mixed finance development
- Seek replacement of public housing units lost to the inventory through section 8 replacement housing resources
- Maintain or increase section 8 lease-up rates by establishing payment standards that will enable families to rent throughout the jurisdiction
- Undertake measures to ensure access to affordable housing among families assisted by the PHA, regardless of unit size required
- Maintain or increase section 8 lease-up rates by marketing the program to owners, particularly those outside of areas of minority and poverty concentration

- Maintain or increase section 8 lease-up rates by effectively screening Section 8 applicants to increase owner acceptance of program
- Participate in the Consolidated Plan development process to ensure coordination with broader community strategies
- Other (list below)

**Strategy 2: Increase the number of affordable housing units by:**

Select all that apply

- Apply for additional section 8 units should they become available
- Leverage affordable housing resources in the community through the creation of mixed - finance housing
- Pursue housing resources other than public housing or Section 8 tenant-based assistance.
- Other: (list below)

**Need: Specific Family Types: Families at or below 30% of median**

**Strategy 1: Target available assistance to families at or below 30 % of AMI**

Select all that apply

- Exceed HUD federal targeting requirements for families at or below 30% of AMI in public housing
- Exceed HUD federal targeting requirements for families at or below 30% of AMI in tenant-based section 8 assistance
- Employ admissions preferences aimed at families with economic hardships
- Adopt rent policies to support and encourage work
- Other: (list below)  
*12-Month Exclusion/50% Income Exclusion*

**Need: Specific Family Types: Families at or below 50% of median**

**Strategy 1: Target available assistance to families at or below 50% of AMI**

Select all that apply

- Employ admissions preferences aimed at families who are working
- Adopt rent policies to support and encourage work
- Other: (list below)

**Need: Specific Family Types: The Elderly**

**Strategy 1: Target available assistance to the elderly:**

Select all that apply

- Seek designation of public housing for the elderly

- Apply for special-purpose vouchers targeted to the elderly, should they become available
- Other: (list below)

**Need: Specific Family Types: Families with Disabilities**

**Strategy 1: Target available assistance to Families with Disabilities:**

Select all that apply

- Seek designation of public housing for families with disabilities
- Carry out the modifications needed in public housing based on the section 504 Needs Assessment for Public Housing
- Apply for special-purpose vouchers targeted to families with disabilities, should they become available
- Affirmatively market to local non-profit agencies that assist families with disabilities
- Other: (list below)

**Need: Specific Family Types: Races or ethnicities with disproportionate housing needs**

**Strategy 1: Increase awareness of PHA resources among families of races and ethnicities with disproportionate needs:**

Select if applicable

- Affirmatively market to races/ethnicities shown to have disproportionate housing needs
- Other: (list below)

**Strategy 2: Conduct activities to affirmatively further fair housing**

Select all that apply

- Counsel section 8 tenants as to location of units outside of areas of poverty or minority concentration and assist them to locate those units
- Market the section 8 program to owners outside of areas of poverty /minority concentrations
- Other: (list below)

**Other Housing Needs & Strategies: (list needs and strategies below)**

**(2) Reasons for Selecting Strategies**

Of the factors listed below, select all that influenced the PHA's selection of the strategies it will pursue:

- Funding constraints

- Staffing constraints
- Limited availability of sites for assisted housing
- Extent to which particular housing needs are met by other organizations in the community
- Evidence of housing needs as demonstrated in the Consolidated Plan and other information available to the PHA
- Influence of the housing market on PHA programs
- Community priorities regarding housing assistance
- Results of consultation with local or state government
- Results of consultation with residents and the Resident Advisory Board
- Results of consultation with advocacy groups
- Other: (list below)

## **2. Statement of Financial Resources**

[24 CFR Part 903.7 9 (b)]

List the financial resources that are anticipated to be available to the PHA for the support of Federal public housing and tenant-based Section 8 assistance programs administered by the PHA during the Plan year. Note: the table assumes that Federal public housing or tenant based Section 8 assistance grant funds are expended on eligible purposes; therefore, uses of these funds need not be stated. For other funds, indicate the use for those funds as one of the following categories: public housing operations, public housing capital improvements, public housing safety/security, public housing supportive services, Section 8 tenant-based assistance, Section 8 supportive services or other.

<b>Financial Resources: Planned Sources and Uses</b>		
<b>Sources</b>	<b>Planned \$</b>	<b>Planned Uses</b>
<b>1. Federal Grants (FY 2003 grants)</b>		
a) Public Housing Operating Fund	3,062,224	
b) Public Housing Capital Fund	3,983,287	PHA Capital Improvements
c) HOPE VI Revitalization		
d) HOPE VI Demolition		
e) Annual Contributions for Section 8 Tenant-Based Assistance	8,569,084	
f) Public Housing Drug Elimination Program (including any Technical Assistance funds)	230,327	PHA safety/security
g) Resident Opportunity and Self-Sufficiency Grants	22,183	PHA Supportive Services
h) Community Development Block Grant		
i) HOME		
Other Federal Grants (list below)		

<b>Financial Resources: Planned Sources and Uses</b>		
<b>Sources</b>	<b>Planned \$</b>	<b>Planned Uses</b>
<b>2. Prior Year Federal Grants (unobligated funds only) (list below)</b>		
<b>3. Public Housing Dwelling Rental Income</b>	5,311,970	Public Housing Operations
<b>4. Other income (list below)</b>		
Non-dwelling rent	11,365	Public Housing Operations
Admin Fees - Section 8	969,712	Program Administration
Investment Income	172,400	Public Housing Operations
Sales and Services to Tenants	65,000	Public Housing Operations
<b>5. Non-federal sources (list below)</b>		
<b>Total resources</b>	<b>22,397,552</b>	

### **3. PHA Policies Governing Eligibility, Selection, and Admissions**

[24 CFR Part 903.7 9 (c)]

#### **A. Public Housing**

Exemptions: PHAs that do not administer public housing are not required to complete subcomponent 3A.

##### **(1) Eligibility**

a. When does the PHA verify eligibility for admission to public housing? (select all that apply)

- When families are within a certain number of being offered a unit: (state number)
- When families are within a certain time of being offered a unit: (state time)
- Other: (describe) *After all verification of income, landlord references, and criminal checks have been received.*

b. Which non-income (screening) factors does the PHA use to establish eligibility for admission to public housing (select all that apply)?

- Criminal or Drug-related activity
- Rental history
- Housekeeping
- Other (describe) *Present and previous landlord references.*

- c.  Yes  No: Does the PHA request criminal records from local law enforcement agencies for screening purposes?
- d.  Yes  No: Does the PHA request criminal records from State law enforcement agencies for screening purposes?
- e.  Yes  No: Does the PHA access FBI criminal records from the FBI for screening purposes? (either directly or through an NCIC-authorized source)

**(2)Waiting List Organization**

- a. Which methods does the PHA plan to use to organize its public housing waiting list (select all that apply)

- Community-wide list
- Sub-jurisdictional lists
- Site-based waiting lists
- Other (describe)

- b. Where may interested persons apply for admission to public housing?

- PHA main administrative office
- PHA development site management office

- Other (list below)

*Mail in applications if extreme hardship as determined by Housing Authority.*

- c. If the PHA plans to operate one or more site-based waiting lists in the coming year, answer each of the following questions; if not, skip to subsection **(3) Assignment**

1. How many site-based waiting lists will the PHA operate in the coming year?

2.  Yes  No: Are any or all of the PHA's site-based waiting lists new for the upcoming year (that is, they are not part of a previously-HUD-approved site based waiting list plan)?  
If yes, how many lists?

3.  Yes  No: May families be on more than one list simultaneously  
If yes, how many lists?

4. Where can interested persons obtain more information about and sign up to be on the site-based waiting lists (select all that apply)?

- PHA main administrative office
- All PHA development management offices
- Management offices at developments with site-based waiting lists
- At the development to which they would like to apply
- Other (list below)

**(3) Assignment**

a. How many vacant unit choices are applicants ordinarily given before they fall to the bottom of or are removed from the waiting list? (select one)

- One
- Two
- Three or More

b.  Yes  No: Is this policy consistent across all waiting list types?

c. If answer to b is no, list variations for any other than the primary public housing waiting list/s for the PHA:

**(4) Admissions Preferences**

a. Income targeting:

Yes  No: Does the PHA plan to exceed the federal targeting requirements by targeting more than 40% of all new admissions to public housing to families at or below 30% of median area income?

b. Transfer policies:

In what circumstances will transfers take precedence over new admissions? (list below)

- Emergencies
- Overhoused
- Underhoused
- Medical justification
- Administrative reasons determined by the PHA (e.g., to permit modernization work)
- Resident choice: (state circumstances below)
- Other: (list below)

c. Preferences

1.  Yes  No: Has the PHA established preferences for admission to public housing (other than date and time of application)? (If "no" is selected, skip to subsection **(5) Occupancy**)

2. Which of the following admission preferences does the PHA plan to employ in the coming year? (select all that apply from either former Federal preferences or other preferences)

Former Federal preferences:

- Involuntary Displacement (Disaster, Government Action, Action of Housing Owner, Inaccessibility, Property Disposition)
- Victims of domestic violence
- Substandard housing
- Homelessness
- High rent burden (rent is > 50 percent of income)

Other preferences: (select below)

- Working families and those unable to work because of age or disability
- Veterans and veterans' families
- Residents who live and/or work in the jurisdiction
- Those enrolled currently in educational, training, or upward mobility programs
- Households that contribute to meeting income goals (broad range of incomes)
- Households that contribute to meeting income requirements (targeting)
- Those previously enrolled in educational, training, or upward mobility programs
- Victims of reprisals or hate crimes
- Other preference(s) (list below)

3. If the PHA will employ admissions preferences, please prioritize by placing a "1" in the space that represents your first priority, a "2" in the box representing your second priority, and so on. If you give equal weight to one or more of these choices (either through an absolute hierarchy or through a point system), place the same number next to each. That means you can use "1" more than once, "2" more than once, etc.

Date and Time

Former Federal preferences:

- Involuntary Displacement (Disaster, Government Action, Action of Housing Owner, Inaccessibility, Property Disposition)
- Victims of domestic violence
- Substandard housing
- Homelessness
- High rent burden

Other preferences (select all that apply)

- 1 Working families and those unable to work because of age or disability
- Veterans and veterans' families
- 3 Residents who live and/or work in the jurisdiction
- 2 Those enrolled currently in educational, training, or upward mobility programs

- 1 Households that contribute to meeting income goals (broad range of incomes)
- 1 Households that contribute to meeting income requirements (targeting)
- Those previously enrolled in educational, training, or upward mobility programs
- Victims of reprisals or hate crimes
- Other preference(s) (list below)

4. Relationship of preferences to income targeting requirements:

- The PHA applies preferences within income tiers
- Not applicable: the pool of applicant families ensures that the PHA will meet income targeting requirements

**(5) Occupancy**

a. What reference materials can applicants and residents use to obtain information about the rules of occupancy of public housing (select all that apply)

- The PHA-resident lease
- The PHA's Admissions and (Continued) Occupancy policy
- PHA briefing seminars or written materials
- Other source (list)

b. How often must residents notify the PHA of changes in family composition? (select all that apply)

- At an annual reexamination and lease renewal
- Any time family composition changes
- At family request for revision
- Other (list)

**(6) Deconcentration and Income Mixing**

a.  Yes  No: Does the PHA have any general occupancy (family) public housing developments covered by the deconcentration rule? If no, this section is complete. If yes, continue to the next question.

b.  Yes  No: Do any of these covered developments have average incomes above or below 85% to 115% of the average incomes of all such developments? If no, this section is complete.

If yes, list these developments as follows:

<b>Deconcentration Policy for Covered Developments</b>
--

Development Name:	Number of Units	Explanation (if any) [see step 4 at §903.2(c)(1)(iv)]	Deconcentration policy (if no explanation) [see step 5 at §903.2(c)(1)(v)]

**B. Section 8**

Exemptions: PHAs that do not administer section 8 are not required to complete sub-component 3B. **Unless otherwise specified, all questions in this section apply only to the tenant-based section 8 assistance program (vouchers, and until completely merged into the voucher program, certificates).**

**(1) Eligibility**

- a. What is the extent of screening conducted by the PHA? (select all that apply)
- Criminal or drug-related activity only to the extent required by law or regulation
  - Criminal and drug-related activity, more extensively than required by law or regulation
  - More general screening than criminal and drug-related activity (list factors below) (*We also check with local Police Department.*)
  - Other (list below)
- b.  Yes  No: Does the PHA request criminal records from local law enforcement agencies for screening purposes?
- c.  Yes  No: Does the PHA request criminal records from State law enforcement agencies for screening purposes?
- d.  Yes  No: Does the PHA access FBI criminal records from the FBI for screening purposes? (either directly or through an NCIC-authorized source)
- e. Indicate what kinds of information you share with prospective landlords? (select all that apply)
- Criminal or drug-related activity
  - Other (describe below)

**(2) Waiting List Organization**

a. With which of the following program waiting lists is the section 8 tenant-based assistance waiting list merged? (select all that apply)

- None
- Federal public housing
- Federal moderate rehabilitation
- Federal project-based certificate program
- Other federal or local program (list below)

b. Where may interested persons apply for admission to section 8 tenant-based assistance? (select all that apply)

- PHA main administrative office
- Other (list below)

**(3) Search Time**

a.  Yes  No: Does the PHA give extensions on standard 60-day period to search for a unit?

If yes, state circumstances below:

*Failed units – Cannot locate suitable unit*

**(4) Admissions Preferences**

a. Income targeting

Yes  No: Does the PHA plan to exceed the federal targeting requirements by targeting more than 75% of all new admissions to the section 8 program to families at or below 30% of median area income?

b. Preferences

1.  Yes  No: Has the PHA established preferences for admission to section 8 tenant-based assistance? (other than date and time of application) (if no, skip to subcomponent **(5) Special purpose section 8 assistance programs**)

2. Which of the following admission preferences does the PHA plan to employ in the coming year? (select all that apply from either former Federal preferences or other preferences)

Former Federal preferences

- Involuntary Displacement (Disaster, Government Action, Action of Housing Owner, Inaccessibility, Property Disposition)
- Victims of domestic violence

- Substandard housing
- Homelessness
- High rent burden (rent is > 50 percent of income)

Other preferences (select all that apply)

- Working families and those unable to work because of age or disability
- Veterans and veterans' families
- Residents who live and/or work in your jurisdiction
- Those enrolled currently in educational, training, or upward mobility programs
- Households that contribute to meeting income goals (broad range of incomes)
- Households that contribute to meeting income requirements (targeting)
- Those previously enrolled in educational, training, or upward mobility programs
- Victims of reprisals or hate crimes
- Other preference(s) (list below)

3. If the PHA will employ admissions preferences, please prioritize by placing a "1" in the space that represents your first priority, a "2" in the box representing your second priority, and so on. If you give equal weight to one or more of these choices (either through an absolute hierarchy or through a point system), place the same number next to each. That means you can use "1" more than once, "2" more than once, etc.

Date and Time

Former Federal preferences

- 1 Involuntary Displacement (Disaster, Government Action, Action of Housing
- 1 Owner, Inaccessibility, Property Disposition)
- 1 Victims of domestic violence
- 1 Substandard housing
- 1 Homelessness
- 1 High rent burden

Other preferences (select all that apply)

- 1 Working families and those unable to work because of age or disability
- Veterans and veterans' families
- 2 Residents who live and/or work in your jurisdiction
- Those enrolled currently in educational, training, or upward mobility programs
- Households that contribute to meeting income goals (broad range of incomes)
- Households that contribute to meeting income requirements (targeting)
- Those previously enrolled in educational, training, or upward mobility programs
- 1 Victims of reprisals or hate crimes
- 2 Other preference(s) (list below) *Disabled*

4. Among applicants on the waiting list with equal preference status, how are applicants selected? (select one)
- Date and time of application
- Drawing (lottery) or other random choice technique
5. If the PHA plans to employ preferences for “residents who live and/or work in the jurisdiction” (select one)
- This preference has previously been reviewed and approved by HUD
- The PHA requests approval for this preference through this PHA Plan
6. Relationship of preferences to income targeting requirements: (select one)
- The PHA applies preferences within income tiers
- Not applicable: the pool of applicant families ensures that the PHA will meet income targeting requirements

**(5) Special Purpose Section 8 Assistance Programs**

- a. In which documents or other reference materials are the policies governing eligibility, selection, and admissions to any special-purpose section 8 program administered by the PHA contained? (select all that apply)
- The Section 8 Administrative Plan
- Briefing sessions and written materials
- Other (list below)
- b. How does the PHA announce the availability of any special-purpose section 8 programs to the public?
- Through published notices
- Other (list below)

**4. PHA Rent Determination Policies**

[24 CFR Part 903.7 9 (d)]

**A. Public Housing**

Exemptions: PHAs that do not administer public housing are not required to complete sub-component 4A.

**(1) Income Based Rent Policies**

Describe the PHA’s income based rent setting policy/ies for public housing using, including discretionary (that is, not required by statute or regulation) income disregards and exclusions, in the appropriate spaces below.

- a. Use of discretionary policies: (select one)

- The PHA will not employ any discretionary rent-setting policies for income based rent in public housing. Income-based rents are set at the higher of 30% of adjusted monthly income, 10% of unadjusted monthly income, the welfare rent, or minimum rent (less HUD mandatory deductions and exclusions). (If selected, skip to sub-component (2))

---or---

- The PHA employs discretionary policies for determining income based rent (If selected, continue to question b.)

b. Minimum Rent

1. What amount best reflects the PHA's minimum rent? (select one)

- \$0  
 \$1-\$25  
 \$26-\$50

2.  Yes  No: Has the PHA adopted any discretionary minimum rent hardship exemption policies?

3. If yes to question 2, list these policies below:

*Zero income, zero rent*

c. Rents set at less than 30% than adjusted income

1.  Yes  No: Does the PHA plan to charge rents at a fixed amount or percentage less than 30% of adjusted income?

2. If yes to above, list the amounts or percentages charged and the circumstances under which these will be used below:

d. Which of the discretionary (optional) deductions and/or exclusions policies does the PHA plan to employ (select all that apply)

- For the earned income of a previously unemployed household member  
 For increases in earned income  
 Fixed amount (other than general rent-setting policy)  
If yes, state amount/s and circumstances below:

Fixed percentage (other than general rent-setting policy)  
If yes, state percentage/s and circumstances below:

- For household heads  
 For other family members  
 For transportation expenses

- For the non-reimbursed medical expenses of non-disabled or non-elderly families
- Other (describe below)  
*Child support / alimony payments*

e. Ceiling rents

1. Do you have ceiling rents? (rents set at a level lower than 30% of adjusted income) (select one)

- Yes for all developments
- Yes but only for some developments
- No

2. For which kinds of developments are ceiling rents in place? (select all that apply)

- For all developments
- For all general occupancy developments (not elderly or disabled or elderly only)
- For specified general occupancy developments
- For certain parts of developments; e.g., the high-rise portion
- For certain size units; e.g., larger bedroom sizes
- Other (list below)

3. Select the space or spaces that best describe how you arrive at ceiling rents (select all that apply)

- Market comparability study
- Fair market rents (FMR)
- 95<sup>th</sup> percentile rents
- 75 percent of operating costs
- 100 percent of operating costs for general occupancy (family) developments
- Operating costs plus debt service
- The "rental value" of the unit
- Other (list below)

f. Rent re-determinations:

1. Between income reexaminations, how often must tenants report changes in income or family composition to the PHA such that the changes result in an adjustment to rent? (select all that apply)

- Never
- At family option
- Any time the family experiences an income increase
- Any time a family experiences an income increase above a threshold amount or percentage: (if selected, specify threshold) 10%
- Other (list below)  
*Decreased family income*

- g.  Yes  No: Does the PHA plan to implement individual savings accounts for residents (ISAs) as an alternative to the required 12 month disallowance of earned income and phasing in of rent increases in the next year?

## **(2) Flat Rents**

1. In setting the market-based flat rents, what sources of information did the PHA use to establish comparability? (select all that apply.)

- The section 8 rent reasonableness study of comparable housing  
 Survey of rents listed in local newspaper  
 Survey of similar unassisted units in the neighborhood  
 Other (list/describe below)

## **B. Section 8 Tenant-Based Assistance**

Exemptions: PHAs that do not administer Section 8 tenant-based assistance are not required to complete sub-component 4B. **Unless otherwise specified, all questions in this section apply only to the tenant-based section 8 assistance program (vouchers, and until completely merged into the voucher program, certificates).**

### **(1) Payment Standards**

Describe the voucher payment standards and policies.

- a. What is the PHA's payment standard? (select the category that best describes your standard)

- At or above 90% but below 100% of FMR  
 100% of FMR  
 Above 100% but at or below 110% of FMR  
 Above 110% of FMR (if HUD approved; describe circumstances below)

- b. If the payment standard is lower than FMR, why has the PHA selected this standard? (select all that apply)

- FMRs are adequate to ensure success among assisted families in the PHA's segment of the FMR area  
 The PHA has chosen to serve additional families by lowering the payment standard  
 Reflects market or submarket  
 Other (list below)

- c. If the payment standard is higher than FMR, why has the PHA chosen this level? (select all that apply)

- FMRs are not adequate to ensure success among assisted families in the PHA's segment of the FMR area  
 Reflects market or submarket

- To increase housing options for families
- Other (list below)

d. How often are payment standards reevaluated for adequacy? (select one)

- Annually
- Other (list below)

e. What factors will the PHA consider in its assessment of the adequacy of its payment standard? (select all that apply)

- Success rates of assisted families
- Rent burdens of assisted families
- Other (list below)

**(2) Minimum Rent**

a. What amount best reflects the PHA’s minimum rent? (select one)

- \$0
- \$1-\$25
- \$26-\$50

b.  Yes  No: Has the PHA adopted any discretionary minimum rent hardship exemption policies? (if yes, list below)  
*Zero Income – Zero Rent*

**5. Operations and Management**

[24 CFR Part 903.7 9 (e)]

Exemptions from Component 5: High performing and small PHAs are not required to complete this section. Section 8 only PHAs must complete parts A, B, and C(2)

**A. PHA Management Structure**

Describe the PHA’s management structure and organization.

(select one)

- An organization chart showing the PHA’s management structure and organization is attached.
- A brief description of the management structure and organization of the PHA follows:

**B. HUD Programs Under PHA Management**

List Federal programs administered by the PHA, number of families served at the beginning of the upcoming fiscal year, and expected turnover in each. (Use “NA” to indicate that the PHA does not operate any of the programs listed below.)

Program Name	Units or Families	Expected
--------------	-------------------	----------

	<b>Served at Year Beginning</b>	<b>Turnover</b>
Public Housing		
Section 8 Vouchers		
Section 8 Certificates		
Section 8 Mod Rehab		
Special Purpose Section 8 Certificates/Vouchers (list individually)		
Public Housing Drug Elimination Program (PHDEP)		
Other Federal Programs(list individually)		

**C. Management and Maintenance Policies**

List the PHA’s public housing management and maintenance policy documents, manuals and handbooks that contain the Agency’s rules, standards, and policies that govern maintenance and management of public housing, including a description of any measures necessary for the prevention or eradication of pest infestation (which includes cockroach infestation) and the policies governing Section 8 management.

- (1) Public Housing Maintenance and Management: (list below)
- (2) Section 8 Management: (list below)

**6. PHA Grievance Procedures**

[24 CFR Part 903.7 9 (f)]

Exemptions from component 6: High performing PHAs are not required to complete component 6. Section 8-Only PHAs are exempt from sub-component 6A.

**A. Public Housing**

1.  Yes  No: Has the PHA established any written grievance procedures in addition to federal requirements found at 24 CFR Part 966, Subpart B, for residents of public housing?

If yes, list additions to federal requirements below:

2. Which PHA office should residents or applicants to public housing contact to initiate the PHA grievance process? (select all that apply)

- PHA main administrative office  
 PHA development management offices  
 Other (list below)

**B. Section 8 Tenant-Based Assistance**

1.  Yes  No: Has the PHA established informal review procedures for applicants to the Section 8 tenant-based assistance program and informal hearing procedures for families assisted by the Section 8 tenant-based assistance program in addition to federal requirements found at 24 CFR 982?

If yes, list additions to federal requirements below:

2. Which PHA office should applicants or assisted families contact to initiate the informal review and informal hearing processes? (select all that apply)

- PHA main administrative office  
 Other (list below)

**7. Capital Improvement Needs**

[24 CFR Part 903.7 9 (g)]

Exemptions from Component 7: Section 8 only PHAs are not required to complete this component and may skip to Component 8.

**A. Capital Fund Activities**

Exemptions from sub-component 7A: PHAs that will not participate in the Capital Fund Program may skip to component 7B. All other PHAs must complete 7A as instructed.

**(1) Capital Fund Program Annual Statement**

Using parts I, II, and III of the Annual Statement for the Capital Fund Program (CFP), identify capital activities the PHA is proposing for the upcoming year to ensure long-term physical and social viability of its public housing developments. This statement can be completed by using the CFP Annual Statement tables provided in the table library at the end of the PHA Plan template **OR**, at the PHA's option, by completing and attaching a properly updated HUD-52837.

Select one:

The Capital Fund Program Annual Statement is provided as an attachment to the PHA Plan at Attachment D (*MA007d02*)

-or-

The Capital Fund Program Annual Statement is provided below: (if selected, copy the CFP Annual Statement from the Table Library and insert here)

(see next page)

## 2) Optional 5-Year Action Plan

Agencies are encouraged to include a 5-Year Action Plan covering capital work items. This statement can be completed by using the 5-Year Action Plan table provided in the table library at the end of the PHA Plan template **OR** by completing and attaching a properly updated HUD-52834.

- a.  Yes  No: Is the PHA providing an optional 5-Year Action Plan for the Capital Fund? (if no, skip to sub-component 7B)
- b. If yes to question a, select one:
- The Capital Fund Program 5-Year Action Plan is provided as an attachment to the PHA Plan at Attachment D (*MA007d02*)
- or-
- The Capital Fund Program 5-Year Action Plan is provided below: (if selected, copy the CFP optional 5 Year Action Plan from the Table Library and insert here)

## B. HOPE VI and Public Housing Development and Replacement Activities (Non-Capital Fund)

Applicability of sub-component 7B: All PHAs administering public housing. Identify any approved HOPE VI and/or public housing development or replacement activities not described in the Capital Fund Program Annual Statement.

- Yes  No: a) Has the PHA received a HOPE VI revitalization grant? (if no, skip to question c; if yes, provide responses to question b for each grant, copying and completing as many times as necessary)
- b) Status of HOPE VI revitalization grant (complete one set of questions for each grant)
1. Development name: *Caroline Street*
  2. Development (project) number: *MA 7-10*
  3. Status of grant: (select the statement that best describes the current status)
    - Revitalization Plan under development
    - Revitalization Plan submitted, pending approval
    - Revitalization Plan approved
    - Activities pursuant to an approved Revitalization Plan underway
- Yes  No: c) Does the PHA plan to apply for a HOPE VI Revitalization grant in the Plan year?  
If yes, list development name/s below:
- Yes  No: d) Will the PHA be engaging in any mixed-finance development activities for public housing in the Plan year?

If yes, list developments or activities below: *Caroline Street*

- Yes  No: e) Will the PHA be conducting any other public housing development or replacement activities not discussed in the Capital Fund Program Annual Statement?  
If yes, list developments or activities below:

### **8. Demolition and Disposition**

[24 CFR Part 903.7 9 (h)]

Applicability of component 8: Section 8 only PHAs are not required to complete this section.

1.  Yes  No: Does the PHA plan to conduct any demolition or disposition activities (pursuant to section 18 of the U.S. Housing Act of 1937 (42 U.S.C. 1437p)) in the plan Fiscal Year? (If “No”, skip to component 9; if “yes”, complete one activity description for each development.)

2. a. Activity Description

- Yes  No: Has the PHA provided the activities description information in the **optional** Public Housing Asset Management Table? (If “yes”, skip to component 9. If “No”, complete the Activity Description table below.)

<b>Demolition/Disposition Activity Description</b>
1a. Development name: <i>Boa Vista</i>
1b. Development (project) number: <i>MA06 P007 006 (MA 7-6)</i>
2. Activity type: Demolition <input type="checkbox"/> Disposition <input checked="" type="checkbox"/>
3. Application status (select one) Approved Submitted, pending approval <input type="checkbox"/> Planned application <input checked="" type="checkbox"/>
4. Date application approved, submitted, or <b>planned for submission</b> : <u><i>(03/10/02)</i></u>
5. Number of units affected: <i>45</i>
6. Coverage of action (select one) <input checked="" type="checkbox"/> Part of the development <input type="checkbox"/> Total development
7. Timeline for activity: a. Actual or projected start date of activity: <i>October 3, 2002</i> b. Projected end date of activity: <i>June 30, 2004</i>

**9. Designation of Public Housing for Occupancy by Elderly Families or Families with Disabilities or Elderly Families and Families with Disabilities**

[24 CFR Part 903.7 9 (i)]

Exemptions from Component 9; Section 8 only PHAs are not required to complete this section.

1.  Yes  No: Has the PHA designated or applied for approval to designate or does the PHA plan to apply to designate any public housing for occupancy only by the elderly families or only by families with disabilities, or by elderly families and families with disabilities or will apply for designation for occupancy by only elderly families or only families with disabilities, or by elderly families and families with disabilities as provided by section 7 of the U.S. Housing Act of 1937 (42 U.S.C. 1437e) in the upcoming fiscal year? (If “No”, skip to component 10. If “yes”, complete one activity description for each development, unless the PHA is eligible to complete a streamlined submission; **PHAs completing streamlined submissions may skip to component 10.**)

2. a. Activity Description

Yes  No: Has the PHA provided all required activity description information for this component in the **optional** Public Housing Asset Management Table? If “yes”, skip to component 10. If “No”, complete the Activity Description table below.

<b>Designation of Public Housing Activity Description</b>	
1a. Development name:	<i>Boa Vista</i>
1b. Development (project) number:	<i>MA06 P007 006 (MA 7-6)</i>
2. Designation type:	Occupancy by only the elderly <input checked="" type="checkbox"/> Occupancy by families with disabilities <input type="checkbox"/> Occupancy by only elderly families and families with disabilities <input type="checkbox"/>
3. Application status (select one)	Approved; included in the PHA’s Designation Plan <input type="checkbox"/> Submitted, pending approval <input type="checkbox"/> Planned application <input checked="" type="checkbox"/>
4. Date this designation approved, submitted, or <b>planned for submission:</b>	<i>(03/10/02)</i>
5. If approved, will this designation constitute a (select one)	<input checked="" type="checkbox"/> New Designation Plan <input type="checkbox"/> Revision of a previously-approved Designation Plan?
6. Number of units affected:	<i>100</i>

7. Coverage of action (select one)  
 Part of the development  
 Total development

**10. Conversion of Public Housing to Tenant-Based Assistance**

[24 CFR Part 903.7 9 (j)]

Exemptions from Component 10; Section 8 only PHAs are not required to complete this section.

**A. Assessments of Reasonable Revitalization Pursuant to section 202 of the HUD FY 1996 HUD Appropriations Act**

1.  Yes  No: Have any of the PHA’s developments or portions of developments been identified by HUD or the PHA as covered under section 202 of the HUD FY 1996 HUD Appropriations Act? (If “No”, skip to component 11; if “yes”, complete one activity description for each identified development, unless eligible to complete a streamlined submission. PHAs completing streamlined submissions may skip to component 11.)

2. Activity Description

- Yes  No: Has the PHA provided all required activity description information for this component in the **optional** Public Housing Asset Management Table? If “yes”, skip to component 11. If “No”, complete the Activity Description table below.

<b>Conversion of Public Housing Activity Description</b>	
1a. Development name:	
1b. Development (project) number:	
2. What is the status of the required assessment?	
<input type="checkbox"/> Assessment underway <input type="checkbox"/> Assessment results submitted to HUD <input type="checkbox"/> Assessment results approved by HUD (if marked, proceed to next question) <input type="checkbox"/> Other (explain below)	
3. <input type="checkbox"/> Yes <input type="checkbox"/> No: Is a Conversion Plan required? (If yes, go to block 4; if no, go to block 5.)	
4. Status of Conversion Plan (select the statement that best describes the current status)	
<input type="checkbox"/> Conversion Plan in development <input type="checkbox"/> Conversion Plan submitted to HUD on: (DD/MM/YYYY) <input type="checkbox"/> Conversion Plan approved by HUD on: (DD/MM/YYYY) <input type="checkbox"/> Activities pursuant to HUD-approved Conversion Plan underway	

5. Description of how requirements of Section 202 are being satisfied by means other than conversion (select one)

- Units addressed in a pending or approved demolition application (date submitted or approved: \_\_\_\_\_)
- Units addressed in a pending or approved HOPE VI demolition application (date submitted or approved: \_\_\_\_\_)
- Units addressed in a pending or approved HOPE VI Revitalization Plan (date submitted or approved: \_\_\_\_\_)
- Requirements no longer applicable: vacancy rates are less than 10 percent
- Requirements no longer applicable: site now has less than 300 units
- Other: (describe below)

**B. Reserved for Conversions pursuant to Section 22 of the U.S. Housing Act of 1937**

(See Attachment M Filename: *MA007m02*)

**C. Reserved for Conversions pursuant to Section 33 of the U.S. Housing Act of 1937**

**11. Homeownership Programs Administered by the PHA**

[24 CFR Part 903.7 9 (k)]

**A. Public Housing**

Exemptions from Component 11A: Section 8 only PHAs are not required to complete 11A.

1.  Yes  No: Does the PHA administer any homeownership programs administered by the PHA under an approved section 5(h) homeownership program (42 U.S.C. 1437c(h)), or an approved HOPE I program (42 U.S.C. 1437aaa) or has the PHA applied or plan to apply to administer any homeownership programs under section 5(h), the HOPE I program, or section 32 of the U.S. Housing Act of 1937 (42 U.S.C. 1437z-4). (If “No”, skip to component 11B; if “yes”, complete one activity description for each applicable program/plan, unless eligible to complete a streamlined submission due to **small PHA** or **high performing PHA** status. PHAs completing streamlined submissions may skip to component 11B.)

2. Activity Description

Yes  No: Has the PHA provided all required activity description information for this component in the **optional** Public Housing Asset Management Table? (If “yes”, skip to component 12. If “No”, complete the Activity Description table below.)

<b>Public Housing Homeownership Activity Description</b> <b>(Complete one for each development affected)</b>	
1a. Development name:	
1b. Development (project) number:	
2. Federal Program authority:	<input type="checkbox"/> HOPE I <input type="checkbox"/> 5(h) <input type="checkbox"/> Turnkey III <input type="checkbox"/> Section 32 of the USHA of 1937 (effective 10/1/99)
3. Application status: (select one)	<input type="checkbox"/> Approved; included in the PHA’s Homeownership Plan/Program <input type="checkbox"/> Submitted, pending approval <input type="checkbox"/> Planned application
4. Date Homeownership Plan/Program approved, submitted, or planned for submission: (DD/MM/YYYY)	
5. Number of units affected:	
6. Coverage of action: (select one)	<input type="checkbox"/> Part of the development <input type="checkbox"/> Total development

## B. Section 8 Tenant Based Assistance

1.  Yes  No: Does the PHA plan to administer a Section 8 Homeownership program pursuant to Section 8(y) of the U.S.H.A. of 1937, as implemented by 24 CFR part 982 ? (If “No”, skip to component 12; if “yes”, describe each program using the table below (copy and complete questions for each program identified), unless the PHA is eligible to complete a streamlined submission due to high performer status. **High performing PHAs** may skip to component 12.)

2. Program Description:

a. Size of Program

Yes  No: Will the PHA limit the number of families participating in the section 8 homeownership option?

If the answer to the question above was yes, which statement best describes the number of participants? (select one)

- 25 or fewer participants
- 26 - 50 participants
- 51 to 100 participants
- more than 100 participants

b. PHA-established eligibility criteria

- Yes  No: Will the PHA's program have eligibility criteria for participation in its Section 8 Homeownership Option program in addition to HUD criteria?

If yes, list criteria below:

## **12. PHA Community Service and Self-sufficiency Programs**

[24 CFR Part 903.7 9 (1)]

Exemptions from Component 12: High performing and small PHAs are not required to complete this component. Section 8-Only PHAs are not required to complete sub-component C.

### **A. PHA Coordination with the Welfare (TANF) Agency**

1. Cooperative agreements:

- Yes  No: Has the PHA entered into a cooperative agreement with the TANF Agency, to share information and/or target supportive services (as contemplated by section 12(d)(7) of the Housing Act of 1937)?

If yes, what was the date that agreement was signed? 29/06/00

2. Other coordination efforts between the PHA and TANF agency (select all that apply)

- Client referrals
- Information sharing regarding mutual clients (for rent determinations and otherwise)
- Coordinate the provision of specific social and self-sufficiency services and programs to eligible families
- Jointly administer programs
- Partner to administer a HUD Welfare-to-Work voucher program
- Joint administration of other demonstration program
- Other (describe)

### **B. Services and programs offered to residents and participants**

#### **(1) General**

a. Self-Sufficiency Policies

Which, if any of the following discretionary policies will the PHA employ to enhance the economic and social self-sufficiency of assisted families in the following areas? (select all that apply)

- Public housing rent determination policies
- Public housing admissions policies
- Section 8 admissions policies
- Preference in admission to section 8 for certain public housing families
- Preferences for families working or engaging in training or education programs for non-housing programs operated or coordinated by the PHA
- Preference/eligibility for public housing homeownership option participation
- Preference/eligibility for section 8 homeownership option participation
- Other policies (list below)

b. Economic and Social self-sufficiency programs

- Yes  No: Does the PHA coordinate, promote or provide any programs to enhance the economic and social self-sufficiency of residents? (If "yes", complete the following table; if "no" skip to sub-component 2, Family Self Sufficiency Programs. The position of the table may be altered to facilitate its use. )

Services and Programs				
Program Name & Description (including location, if appropriate)	Estimated Size	Allocation Method (waiting list/random selection/specific criteria/other)	Access (development office / PHA main office / other provider name)	Eligibility (public housing or section 8 participants or both)
Greater New Bedford Training Career Center, 1618 Acushnet Avenue, New Bedford, MA	30	Any NBHA Resident or Section 8 Certificate Holder	Greater New Bedford Career Center	Both

**(2) Family Self Sufficiency program/s**

a. Participation Description

Family Self Sufficiency (FSS) Participation		
Program	Required Number of Participants (start of FY 2003 Estimate)	Actual Number of Participants (As of: 12/09/00)

Public Housing	25	30 participants as of Sept, 12, 2000
Section 8	0	

- b.  Yes  No: If the PHA is not maintaining the minimum program size required by HUD, does the most recent FSS Action Plan address the steps the PHA plans to take to achieve at least the minimum program size?  
If no, list steps the PHA will take below:

**C. Welfare Benefit Reductions**

1. The PHA is complying with the statutory requirements of section 12(d) of the U.S. Housing Act of 1937 (relating to the treatment of income changes resulting from welfare program requirements) by: (select all that apply)

- Adopting appropriate changes to the PHA's public housing rent determination policies and train staff to carry out those policies
- Informing residents of new policy on admission and reexamination
- Actively notifying residents of new policy at times in addition to admission and reexamination.
- Establishing or pursuing a cooperative agreement with all appropriate TANF agencies regarding the exchange of information and coordination of services
- Establishing a protocol for exchange of information with all appropriate TANF agencies
- Other: (list below)

**D. Reserved for Community Service Requirement pursuant to section 12(c) of the U.S. Housing Act of 1937**

*(Policy no longer required by HUD)*

**13. PHA Safety and Crime Prevention Measures**

[24 CFR Part 903.7 9 (m)]

Exemptions from Component 13: High performing and small PHAs not participating in PHDEP and Section 8 Only PHAs may skip to component 15. High Performing and small PHAs that are participating in PHDEP and are submitting a PHDEP Plan with this PHA Plan may skip to sub-component D.

**A. Need for measures to ensure the safety of public housing residents**

1. Describe the need for measures to ensure the safety of public housing residents (select all that apply)

- High incidence of violent and/or drug-related crime in some or all of the PHA's developments
- High incidence of violent and/or drug-related crime in the areas surrounding or adjacent to the PHA's developments
- Residents fearful for their safety and/or the safety of their children

- Observed lower-level crime, vandalism and/or graffiti
- People on waiting list unwilling to move into one or more developments due to perceived and/or actual levels of violent and/or drug-related crime
- Other (describe below)

2. What information or data did the PHA used to determine the need for PHA actions to improve safety of residents (select all that apply).

- Safety and security survey of residents
- Analysis of crime statistics over time for crimes committed “in and around” public housing authority
- Analysis of cost trends over time for repair of vandalism and removal of graffiti
- Resident reports
- PHA employee reports
- Police reports
- Demonstrable, quantifiable success with previous or ongoing anticrime/anti drug programs
- Other (describe below)

3. Which developments are most affected? (list below)

**B. Crime and Drug Prevention activities the PHA has undertaken or plans to undertake in the next PHA fiscal year**

1. List the crime prevention activities the PHA has undertaken or plans to undertake: (select all that apply)

- Contracting with outside and/or resident organizations for the provision of crime- and/or drug-prevention activities
- Crime Prevention Through Environmental Design
- Activities targeted to at-risk youth, adults, or seniors
- Volunteer Resident Patrol/Block Watchers Program
- Other (describe below)

2. Which developments are most affected? (list below)

**C. Coordination between PHA and the police**

1. Describe the coordination between the PHA and the appropriate police precincts for carrying out crime prevention measures and activities: (select all that apply)

- Police involvement in development, implementation, and/or ongoing evaluation of drug-elimination plan
- Police provide crime data to housing authority staff for analysis and action
- Police have established a physical presence on housing authority property (e.g., community policing office, officer in residence)
- Police regularly testify in and otherwise support eviction cases

- Police regularly meet with the PHA management and residents
- Agreement between PHA and local law enforcement agency for provision of above-baseline law enforcement services
- Other activities (list below)

2. Which developments are most affected? (list below)

**D. Additional information as required by PHDEP/PHDEP Plan**

PHAs eligible for FY 2003 PHDEP funds must provide a PHDEP Plan meeting specified requirements prior to receipt of PHDEP funds.

- Yes  No: Is the PHA eligible to participate in the PHDEP in the fiscal year covered by this PHA Plan?
- Yes  No: Has the PHA included the PHDEP Plan for FY 2003 in this PHA Plan?
- Yes  No: This PHDEP Plan is an Attachment. (Attachment Filename: *(MA007a02)*)

**14. RESERVED FOR PET POLICY**

[24 CFR Part 903.7 9 (n)] (See Attachment G Filename: *MA007g02*)

**15. Civil Rights Certifications**

[24 CFR Part 903.7 9 (o)]

Civil rights certifications are included in the PHA Plan Certifications of Compliance with the PHA Plans and Related Regulations.

**16. Fiscal Audit**

[24 CFR Part 903.7 9 (p)]

- 1.  Yes  No: Is the PHA required to have an audit conducted under section 5(h)(2) of the U.S. Housing Act of 1937 (42 U.S.C. 1437c(h))?  
(If no, skip to component 17.)
- 2.  Yes  No: Was the most recent fiscal audit submitted to HUD?
- 3.  Yes  No: Were there any findings as the result of that audit?
- 4.  Yes  No: If there were any findings, do any remain unresolved?  
If yes, how many unresolved findings remain? \_\_\_\_\_
- 5.  Yes  No: Have responses to any unresolved findings been submitted to HUD?  
If not, when are they due (state below)?

## **17. PHA Asset Management**

[24 CFR Part 903.7 9 (q)]

Exemptions from component 17: Section 8 Only PHAs are not required to complete this component. High performing and small PHAs are not required to complete this component.

1.  Yes  No: Is the PHA engaging in any activities that will contribute to the long-term asset management of its public housing stock , including how the Agency will plan for long-term operating, capital investment, rehabilitation, modernization, disposition, and other needs that have **not** been addressed elsewhere in this PHA Plan?
2. What types of asset management activities will the PHA undertake? (select all that apply)
  - Not applicable
  - Private management
  - Development-based accounting
  - Comprehensive stock assessment
  - Other: (list below)
3.  Yes  No: Has the PHA included descriptions of asset management activities in the **optional** Public Housing Asset Management Table?

## **18. Other Information**

[24 CFR Part 903.7 9 (r)]

### **A. Resident Advisory Board Recommendations**

1.  Yes  No: Did the PHA receive any comments on the PHA Plan from the Resident Advisory Board/s?
2. If yes, the comments are: (if comments were received, the PHA **MUST** select one)
  - Attached at Attachment E (File name: **MA007e02 contains statement that RAB offered no suggestive changes.**)
  - Provided below:
3. In what manner did the PHA address those comments? (select all that apply)
  - Considered comments, but determined that no changes to the PHA Plan were necessary.
  - The PHA changed portions of the PHA Plan in response to comments  
List changes below:
  - Other: (list below)

### **B. Description of Election process for Residents on the PHA Board**

1.  Yes  No: Does the PHA meet the exemption criteria provided section 2(b)(2) of the U.S. Housing Act of 1937? (If no, continue to question 2; if yes, skip to sub-component C.)
2.  Yes  No: Was the resident who serves on the PHA Board elected by the residents? (If yes, continue to question 3; if no, skip to sub-component C.)

3. Description of Resident Election Process

a. Nomination of candidates for place on the ballot: (select all that apply)

- Candidates were nominated by resident and assisted family organizations
- Candidates could be nominated by any adult recipient of PHA assistance
- Self-nomination: Candidates registered with the PHA and requested a place on ballot
- Other: (describe)

b. Eligible candidates: (select one)

- Any recipient of PHA assistance
- Any head of household receiving PHA assistance
- Any adult recipient of PHA assistance
- Any adult member of a resident or assisted family organization
- Other (list)

c. Eligible voters: (select all that apply)

- All adult recipients of PHA assistance (public housing and section 8 tenant-based assistance)
- Representatives of all PHA resident and assisted family organizations
- Other (list)

**C. Statement of Consistency with the Consolidated Plan**

For each applicable Consolidated Plan, make the following statement (copy questions as many times as necessary).

1. Consolidated Plan jurisdiction: (*New Bedford, Massachusetts*)
2. The PHA has taken the following steps to ensure consistency of this PHA Plan with the Consolidated Plan for the jurisdiction: (select all that apply)
- The PHA has based its statement of needs of families in the jurisdiction on the needs expressed in the Consolidated Plan/s.
- The PHA has participated in any consultation process organized and offered by the Consolidated Plan agency in the development of the Consolidated Plan.
- The PHA has consulted with the Consolidated Plan agency during the development of this PHA Plan.

- Activities to be undertaken by the PHA in the coming year are consistent with the initiatives contained in the Consolidated Plan. (list below)

*Caroline Street renovation: frail elderly housing*

*Affordable housing modernization and deleading activities*

*Boa Vista renovation: convert three floors to assisted living*

- Other: (list below)

3. The Consolidated Plan of the jurisdiction supports the PHA Plan with the following actions and commitments: (describe below)

*Seek additional sources of affordable housing revenue; preserve and enhance existing stock of affordable housing.*

#### **D. Other Information Required by HUD**

Use this section to provide any additional information requested by HUD.

## **Attachments**

Use this section to provide any additional attachments referenced in the Plans.

### Optional Table for 5-Year Action Plan for Capital Fund (Component 7)

Complete one table for each development in which work is planned in the next 5 PHA fiscal years. Complete a table for any PHA-wide physical or management improvements planned in the next 5 PHA fiscal year. Copy this table as many times as necessary. Note: PHAs need not include information from Year One of the 5-Year cycle, because this information is included in the Capital Fund Program Annual Statement.

Optional 5-Year Action Plan Tables				
Development Number	Development Name (or indicate PHA wide)	Number Vacant Units	% Vacancies in Development	
Description of Needed Physical Improvements or Management Improvements			Estimated Cost	Planned Start Date (HA Fiscal Year)
Total estimated cost over next 5 years				



# **ATTACHMENT A**

**MA007a02**

# **FY 2003 PHDEP PLAN**

# Public Housing Drug Elimination Program Plan

**Note: THIS PHDEP Plan template (HUD 50075-PHDEP Plan) is to be completed in accordance with Instructions located in applicable PIH Notices.**

**Annual PHDEP Plan Table of Contents:**

1. General Information/History
2. PHDEP Plan Goals/Budget
3. Milestones
4. Certifications

**Section 1: General Information/History**

- A. Amount of PHDEP Grant **\$404,900**
- B. Eligibility type (Indicate with an “x”)      N1 \_\_\_\_\_ N2 \_\_\_\_\_ R **x** \_\_\_\_\_
- C. FFY in which funding is requested **2003** \_\_\_\_\_
- D. Executive Summary of Annual PHDEP Plan

In the space below, provide a brief overview of the PHDEP Plan, including highlights of major initiatives or activities undertaken. It may include a description of the expected outcomes. The summary must not be more than five (5) sentences long

*The New Bedford Housing Authority proposes a comprehensive enforcement and prevention strategy to eliminate drugs from its developments. Supplemental police patrols reinforce personal safety. Educational and recreational programs strongly linked to academic achievement target at-risk families and youth and work closely in concert with existing programs, such as the Police Residency Program. The Aries Drive Educational Enhancement Center and Point Program provides educational tools for families within a neutral environment. The People Empowering People Program trains residents to become leaders in their communities and run 4-H After School Programs.*

**E. Target Areas**

Complete the following table by indicating each PHDEP Target Area (development or site where activities will be conducted), the total number of units in each PHDEP Target Area, and the total number of individuals expected to participate in PHDEP sponsored activities in each Target Area.

PHDEP Target Areas (Name of development(s) or site)	Total # of Units within the PHDEP Target Area(s)	Total Population to be Served within the PHDEP Target Area(s)
Bay Village, Presidential Heights, Brickenwood, Westlawn, Boa Vista, Hillside Court, Mosher Street, Harwich Manor, Caroline Street, Shawmut Village, Satellite Village, Chaffee Street, Adams Street, Dottin Place I, Dottin Place II, and Scattered Sites	1,639	3,549

**F. Duration of Program**

Indicate the duration (number of months funds will be required) of the PHDEP Program proposed under this Plan (place an “x” to indicate the length of program by # of months. For “Other”, identify the # of months).

**6 Months** \_\_\_\_\_      **12 Months** **x** \_\_\_\_\_      **18 Months** \_\_\_\_\_      **24 Months** \_\_\_\_\_      **Other** \_\_\_\_\_

**G. PHDEP Program History**

Indicate each FY that funding has been received under the PHDEP Program (place an “x” by each applicable Year) and provide amount of funding received. If previously funded programs have not been closed out at the time of this submission, indicate the fund balance and anticipated completion date. For grant extensions received, place “GE” in column or “W” for waivers.

Fiscal Year of Funding	PHDEP Funding Received	Grant #	Fund Balance as of Date of this Submission	Grant Extensions or Waivers	Anticipated Completion Date	
FY 1995	x	\$412,500	MA06DEP0070195	0	N/A	Complete
FY 1996	x	\$401,750	MA06DEP0070196	0	N/A	Complete
FY 1997	x	\$428,220	MA06DEP0070197	0	N/A	Complete
FY 1998	x	\$425,880	MA06DEP0070198	0	N/A	Complete
FY 1999	x	\$362,682	MA06DEP0070199	0	N/A	Complete
FY 2000	x	\$377,989	MA06DEP0070100	\$121,798	N/A	12/31/02
FY 2001	x	\$404,900	MA06DEP0070101	\$374,014	N/A	12/31/03

**Section 2: PHDEP Plan Goals and Budget**

**A. PHDEP Plan Summary**

In the space below, summarize the PHDEP strategy to address the needs of the target population/target area(s). Your summary should briefly identify: the broad goals and objectives, the role of plan partners, and your system or process for monitoring and evaluating PHDEP-funded activities. This summary should not exceed 5-10 sentences.

*The present schedule employs individual officers to walking patrols in targeted areas. These supplemental police details provide sector relief and backup beyond basic baseline services and are not utilized as primary responders for normal city police calls. It has been determined that rotating one-person assignments provides sufficient coverage due to the availability of immediate vehicle patrol backup in the event of an emergency.*

*All foot patrols are supervised by a ranking PRIDE officer on duty in a patrol vehicle. This officer has the authority to move officers from less active developments to those experiencing problems.*

*The NBHA has partnered with the Bristol County District Attorney’s Office and the Sheriff’s Department. Although local police efforts to date have been somewhat successful, the assistance provided through these other law-enforcement programs, including traditional enforcement agents from the Drug Enforcement Agency, the Bureau of Alcohol, Tobacco and Firearms, and the FBI have been rewarding. Our PHDEP plan also provides viable drug prevention strategies in education and youth activities through collaborations with the New Bedford School Department, the New Bedford Recreation Department, Boys and Girls Club, 4-H Program, and the University of Massachusetts at Dartmouth.*

*The evaluations of PHDEP-funded activities of the NBHA are conducted by the Center for Policy Analysis from the University of Massachusetts at Dartmouth.*

## B. PHDEP Budget Summary

Enter the total amount of PHDEP funding allocated to each line item.

<b>FY 2003 PHDEP Budget Summary</b>	
<b>Budget Line Item</b>	<b>Total Funding</b>
9110 – Reimbursement of Law Enforcement	\$255,982
9120 - Security Personnel	\$ 17,716
9130 – Employment of Investigators	\$ 8,500
9140 - Voluntary Tenant Patrol	
9150 - Physical Improvements	
9160 - Drug Prevention	\$116,702
9170 - Drug Intervention	
9180 - Drug Treatment	
9190 - Other Program Costs	\$ 6,000
<b>TOTAL PHDEP FUNDING</b>	<b>\$404,900</b>

## C. PHDEP Plan Goals and Activities

In the tables below, provide information on the PHDEP strategy summarized above by budget line item. Each goal and objective should be numbered sequentially for each budget line item (where applicable). Use as many rows as necessary to list proposed activities (additional rows may be inserted in the tables). PHAs are not required to provide information in shaded boxes. Information provided must be concise—not to exceed two sentences in any column. Tables for line items in which the PHA has no planned goals or activities may be deleted.

<b>9110 – Reimbursement of Law Enforcement</b>					<b>Total PHDEP Funding: \$ 255,982</b>		
Goal(s)							
Objectives							
Proposed Activities	# of Persons Served	Target Population	Start Date	Expected Complete Date	PHEDEP Funding	Other Funding (Amount/Source)	Performance Indicators
1. PRIDE Patrols			1/1/03	12/31/03	\$255,982		Decrease Crime Rate
2.							
3.							

<b>9120 - Security Personnel</b>					<b>Total PHDEP Funding: \$ 17,716</b>		
Goal(s)							
Objectives							
Proposed Activities	# of Persons Served	Target Population	Start Date	Expected Complete Date	PHEDEP Funding	Other Funding (Amount/Source)	Performance Indicators
1. Security Clerk			1/1/03	12/31/03	\$ 17,716		
2.							
3.							

<b>9130 - Employment of Investigators</b>					<b>Total PHDEP Funding: \$ 8,500</b>		
Goal(s)							
Objectives							
Proposed Activities	# of Persons Served	Target Population	Start Date	Expected Complete Date	PHEDEP Funding	Other Funding (Amount /Source)	Performance Indicators
1. Investigators			1/1/03	12/31/03	\$ 8,500		
2.							
3.							

<b>9160 - Drug Prevention</b>					<b>Total PHDEP Funding: \$116,702</b>		
Goal(s)							
Objectives							
Proposed Activities	# of Persons Served	Target Population	Start Date	Expected Complete Date	PHEDEP Funding	Other Funding (Amount /Source)	Performance Indicators
1. Substance Abuse Education	150	3,549	1/1/03	12/31/03	\$18,668		Sustained participation
2. Educational	1475	3,549	1/1/03	12/31/03	\$40,395	\$134,567 / MA Service Alliance/ New Bedford School Dept /Prevention Partnership	
3. Recreation / Sports	700	3,549	1/1/03	12/31/03	\$57,639	\$79,200/ Ronald McDonald House/United Way, CDBG/UMass Dartmouth / Dept of Health & Human Services.	

<b>9190 - Other Program Costs</b>					<b>Total PHDEP Funds: \$ 6,000</b>		
Goal(s)							
Objectives							
Proposed Activities	# of Persons Served	Target Population	Start Date	Expected Complete Date	PHDEP Funding	Other Funding (Amount /Source)	Performance Indicators
1. Evaluation (Program)			1/1/03	12/31/03	\$ 6,000		
2.							
3.							

**Section 3: Expenditure/Obligation Milestones**

Indicate by Budget Line Item and the Proposed Activity (based on the information contained in Section 2 PHDEP Plan Budget and Goals), the % of funds that will be expended (at least 25% of the total grant award) and obligated (at least 50% of the total grant award) within 12 months of grant execution.

Budget Line Item #	25% Expenditure of Total Grant Funds By Activity #	Total PHDEP Funding Expended (sum of the activities)	50% Obligation of Total Grant Funds by Activity #	Total PHDEP Funding Obligated (sum of the activities)
<i>e.g Budget Line Item # 9120</i>	<i>Activities 1, 3</i>		<i>Activity 2</i>	
9110	65%	\$166,388	80%	\$255,982
9120	100%	\$ 17,716	100%	\$ 17,716
9130	65%	\$ 5,525	80%	\$ 8,500
9140				
9150				
9160	60%	\$ 70,021	100%	\$116,702
9170				
9180				
9190	100%	\$ 6,000	100%	\$ 6,000
<b>TOTAL</b>		\$265,650		\$404,900

**Section 4: Certifications**

A comprehensive certification of compliance with respect to the PHDEP Plan submission is included in the “PHA Certifications of Compliance with the PHA Plan and Related Regulations.”

NEW BEDFORD HOUSING AUTHORITY										
5 -YEAR PLAN										
FOR FY BEGINNING JANUARY 1, 2003										
STATEMENT OF FINANCIAL RESOURCES										
					PLANNED USES					
		PUBLIC HOUSING OPERATIONS		PUBLIC HOUSING MODERNIZATION		SEC 8 PAYMENTS TO OWNERS		SEC 8 PROGRAM ADMINISTRATION		ANTI-CRIME & SECURITY
										SOCIAL SERVICE COORDINATOR
<b>AVAILABLE RESOURCES</b>										
<b>OPERATING RESOURCES</b>										
PERFORMANCE FUNDING SUBSIDY		3,062,224								
DWELLING RENTS		5,311,970								
INVESTMENT INCOME		172,400								
OTHER INCOME		76,365								
<b>CAPITAL RESOURCES</b>										
CAPITAL FUND PROGRAM				3,983,287						
<b>SECTION 8 HOUSING ASSISTANCE</b>										
HOUSING ASSISTANCE						8,569,084				
ADMINISTRATION FEES								969,712		
								-		
DRUG ELIMINATION GRANT									230,327	
SOCIAL SERVICES COORDINATOR GRANT										22,183
<b>TOTAL</b>	<b>22,397,552</b>	<b>8,622,959</b>		<b>3,983,287</b>		<b>8,569,084</b>		<b>969,712</b>	<b>230,327</b>	<b>22,183</b>

NEW BEDFORD HOUSING AUTHORITY										
5 -YEAR PLAN										
FOR FY BEGINNING JANUARY 1, 2004										
STATEMENT OF FINANCIAL RESOURCES										
					PLANNED USES					
		PUBLIC HOUSING OPERATIONS		PUBLIC HOUSING MODERNIZATION	SEC 8 PAYMENTS TO OWNERS		SEC 8 PROGRAM ADMINISTRATION		ANTI-CRIME & SECURITY	SOCIAL SERVICE COORDINATOR
<b>AVAILABLE RESOURCES</b>										
<b>OPERATING RESOURCES</b>										
PERFORMANCE FUNDING SUBSIDY		3,062,224								
DWELLING RENTS		5,418,209								
INVESTMENT INCOME		172,400								
OTHER INCOME		76,365								
<b>CAPITAL RESOURCES</b>										
CAPITAL FUND PROGRAM				3,486,808						
HOPE VI										
<b>SECTION 8 HOUSING ASSISTANCE</b>										
HOUSING ASSISTANCE					9,211,765					
ADMINISTRATION FEES							989,106			
							-			
<b>DRUG ELIMINATION GRANT</b>									112,332	
<b>SOCIAL SERVICES COORDINATOR GRANT</b>										
<b>TOTAL</b>	<b>22,529,210</b>	<b>8,729,198</b>		<b>3,486,808</b>	<b>9,211,765</b>		<b>989,106</b>		<b>112,332</b>	<b>-</b>

NEW BEDFORD HOUSING AUTHORITY										
5 -YEAR PLAN										
FOR FY BEGINNING JANUARY 1, 2005										
STATEMENT OF FINANCIAL RESOURCES										
					PLANNED USES					
		PUBLIC HOUSING OPERATIONS		PUBLIC HOUSING MODERNIZATION	SEC 8 PAYMENTS TO OWNERS		PROGRAM ADMINISTRATION		ANTI-CRIME & SECURITY	SOCIAL SERVICE COORDINATOR
<b>AVAILABLE RESOURCES</b>										
<b>OPERATING RESOURCES</b>										
PERFORMANCE FUNDING SUBSIDY		3,062,224								
DWELLING RENTS		5,526,574								
INVESTMENT INCOME		172,400								
OTHER INCOME		76,365								
<b>CAPITAL RESOURCES</b>										
CAPITAL FUND PROGRAM				1,440,048						
<b>SECTION 8 HOUSING ASSISTANCE</b>										
HOUSING ASSISTANCE					9,902,648					
ADMINISTRATION FEES							1,008,888			
							-			
<b>DRUG ELIMINATION GRANT</b>									-	
<b>SOCIAL SERVICES COORDINATOR GRANT</b>										
<b>TOTAL</b>	<b>21,189,147</b>	<b>8,837,563</b>		<b>1,440,048</b>	<b>9,902,648</b>		<b>1,008,888</b>		<b>-</b>	<b>-</b>

NEW BEDFORD HOUSING AUTHORITY									
5 -YEAR PLAN									
FOR FY BEGINNING JANUARY 1, 2006									
STATEMENT OF FINANCIAL RESOURCES									
					PLANNED USES				
		PUBLIC HOUSING OPERATIONS	PUBLIC HOUSING MODERNIZATION		SEC 8 PAYMENTS TO OWNERS		PROGRAM ADMINISTRATION		ANTI-CRIME & SECURITY
<b>AVAILABLE RESOURCES</b>									
<b>OPERATING RESOURCES</b>									
PERFORMANCE FUNDING SUBSIDY		3,062,224							
DWELLING RENTS		5,637,105							
INVESTMENT INCOME		172,400							
OTHER INCOME		76,365							
<b>CAPITAL RESOURCES</b>									
CAPITAL FUND PROGRAM			-						
HOPE VI									
<b>SECTION 8 HOUSING ASSISTANCE</b>									
HOUSING ASSISTANCE					10,645,346				
ADMINISTRATION FEES							1,029,066		
							-		
<b>DRUG ELIMINATION GRANT</b>									
SOCIAL SERVICES COORDINATOR GRANT									-
<b>TOTAL</b>	<b>20,622,506</b>	<b>8,948,094</b>	<b>-</b>		<b>10,645,346</b>		<b>1,029,066</b>		<b>-</b>

NEW BEDFORD HOUSING AUTHORITY										
5 -YEAR PLAN										
FOR FY BEGINNING JANUARY 1, 2007										
STATEMENT OF FINANCIAL RESOURCES										
					PLANNED USES					
		PUBLIC HOUSING OPERATIONS		PUBLIC HOUSING MODERNIZATION	SEC 8 PAYMENTS TO OWNERS		SEC 8 PROGRAM ADMINISTRATION		ANTI-CRIME & SECURITY	SOCIAL SERVICE COORDINATOR
<b>AVAILABLE RESOURCES</b>										
<b>OPERATING RESOURCES</b>										
PERFORMANCE FUNDING SUBSIDY		3,062,224								
DWELLING RENTS		5,749,847								
INVESTMENT INCOME		172,400								
OTHER INCOME		76,365								
<b>CAPITAL RESOURCES</b>										
CAPITAL FUND PROGRAM				-						
<b>SECTION 8 HOUSING ASSISTANCE</b>										
HOUSING ASSISTANCE					11,443,747					
ADMINISTRATION FEES							1,049,647			
							-			
DRUG ELIMINATION GRANT									-	
SOCIAL SERVICES COORDINATOR GRANT										
<b>TOTAL</b>	<b>21,554,231</b>	<b>9,060,836</b>		<b>-</b>	<b>11,443,747</b>		<b>1,049,647</b>		<b>-</b>	<b>-</b>

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	NEW BEDFORD HOUSING AUTHORITY														
2	5 -YEAR PLAN														
3	FOR FY BEGINNING JANUARY 1, 2003														
4	STATEMENT OF FINANCIAL RESOURCES														
5															
6															
7		<b>TOTAL</b>	<b>PRIOR</b>		<b>2003</b>		<b>2004</b>		<b>2005</b>		<b>2006</b>		<b>2007</b>		
8		<b>GRANT</b>	<b>YEARS</b>		<b>YEAR</b>		<b>YEAR</b>		<b>YEAR</b>		<b>YEAR</b>		<b>YEAR</b>		<b>TOTAL</b>
9					<b>ONE</b>		<b>TWO</b>		<b>THREE</b>		<b>FOUR</b>		<b>FIVE</b>		
10	<b>AVAILABLE RESOURCES</b>														
11															
12	<b><u>CAPITAL RESOURCES</u></b>														
13															
14															
15															
16															
17															
18	<b>CAPITAL FUND PROGRAM</b>														
19															
20	MA06P00750100	4,430,238	3,933,759		496,479										4,430,238
21															
22	MA06P00750101	4,531,025	437,503		2,046,761		2,046,761								4,531,025
23															
24	MA06P00750202	4,320,142			1,440,047		1,440,047		1,440,048						4,320,142
25															
26	MA06R00750100	93,346													93,346
27															
28	MA06R00750101	95,470													95,470
29															
30															
31	<b>TOTAL</b>	13,470,221	4,371,262		3,983,287		3,486,808		1,440,048		-		-		13,470,221
32															
33	<b>HOPE VI</b>	4,146,780	4,146,780												4,146,780
34	<b>GRANT</b>	250,000	250,000												250,000
35	<b>FHLB</b>	250,000	250,000												250,000
36	<b>TOTAL</b>	<b>4,646,780</b>	<b>4,646,780</b>												4,646,780
37															
38	<b>DRUG ELIMINATION GRANT</b>														
39															
40															
41															
42	70100	377,989	259,994		117,995										377,989
43															
44	70101	404,900	180,236		112,332		112,332								404,900
45															
46	<b>TOTAL</b>	782,889	259,994		230,327		112,332		-		-		0		782,889
47															
48	<b>S S COORDINATOR GRANT</b>	44,367	22,184		22,183										44,367
49															

# **ATTACHMENT C**

MA007c02

# **DECONCENTRATION POLICY**

ADMISSIONS POLICY FOR  
THE DECONCENTRATION OF  
FAMILY DEVELOPMENTS

The NBHA has adopted an Admission Policy for the Deconcentration of Family Developments. It is the policy of the NBHA to admit only eligible qualified applicant families in accordance with the criteria of its policy on Admissions and Continued Occupancy. In achieving our goals the NBHA employs waiting list “skipping” to achieve deconcentration of poverty or income mixing goals at targeted developments. The analysis of these income types was based on our 1999 Resident Profile and the 1990 Census Tract for the New Bedford area. This policy is an addendum to our SELECTION FROM THE WAITING LIST (Page 15)

The following developments are used in the deconcentration of **extremely low-income** families by offering higher income applicants available units:

BAY VILLAGE  
PRESIDENTIAL HEIGHTS  
BRICKENWOOD  
WESTLAWN  
SATELLITE VILLAGE  
SHAWMUT VILLAGE

The following developments are used in the deconcentration of **very low-income** families by offering higher income applicants available units.

DUNCAN DOTTIN PLACE

# **ATTACHMENT D**

MA007d02

## **CAPITAL FUND PROGRAM ANNUAL STATEMENT - 2003**

**AND**

## **FIVE-YEAR ACTION PLAN 2003 - 2007**

**CAPITAL FUND PROGRAM TABLES START HERE**

<b>Annual Statement/Performance and Evaluation Report</b>					
<b>Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part I: Summary</b>					
<b>PHA Name: New Bedford Housing Authority</b>		<b>Grant Type and Number</b> Capital Fund Program Grant No: MA06-P00750203 Replacement Housing Factor Grant No:			<b>Federal FY of Grant:</b> <b>2003</b>
<input checked="" type="checkbox"/> <b>Original Annual Statement</b> <input type="checkbox"/> <b>Reserve for Disasters/ Emergencies</b> <input type="checkbox"/> <b>Revised Annual Statement (revision no:        )</b> <input type="checkbox"/> <b>Performance and Evaluation Report for Period Ending:</b> <input type="checkbox"/> <b>Final Performance and Evaluation Report</b>					
<b>Line No.</b>	<b>Summary by Development Account</b>	<b>Total Estimated Cost</b>		<b>Total Actual Cost</b>	
		<b>Original</b>	<b>Revised</b>	<b>Obligated</b>	<b>Expended</b>
1	Total non-CFP Funds				
2	1406 Operations	\$350,000			
3	1408 Management Improvements	\$93,000			
4	1410 Administration	\$432,014			
5	1411 Audit				
6	1415 Liquidated Damages				
7	1430 Fees and Costs	\$250,000			
8	1440 Site Acquisition				
9	1450 Site Improvement	\$150,000			
10	1460 Dwelling Structures	\$2,670,000			
11	1465.1 Dwelling Equipment—Nonexpendable	\$97,000			
12	1470 Nondwelling Structures				
13	1475 Nondwelling Equipment				
14	1485 Demolition				
15	1490 Replacement Reserve				
16	1492 Moving to Work Demonstration				
17	1495.1 Relocation Costs				
18	1499 Development Activities				
19	1501 Collateralization or Debt Service				
20	1502 Contingency	\$278,128			
21	Amount of Annual Grant: (sum of lines 2 – 20)	\$4,320,142			
22	Amount of line 21 Related to LBP Activities				
23	Amount of line 21 Related to Section 504 compliance				
24	Amount of line 21 Related to Security – Soft Costs				
25	Amount of Line 21 Related to Security – Hard Costs				
26	Amount of line 21 Related to Energy Conservation Measures				

<b>Annual Statement/Performance and Evaluation Report</b>								
<b>Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)</b>								
<b>Part II: Supporting Pages</b>								
PHA Name: New Bedford Housing Authority			<b>Grant Type and Number</b> Capital Fund Program Grant No: MA06-P00750203 Replacement Housing Factor Grant No:			<b>Federal FY of Grant: FY2003</b>		
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
1. MA7-1 Bay Village	Interior Modernization: Kitchens and baths/Improve attic ventilation	1460	200	\$100,000				
	Heating Improvements	1460	200	\$50,000				
2. MA7-2 Presidential Heights	Interior Modernization: Kitchens and baths	1460	200	\$100,000				
	Heating Improvements	1460	200	\$50,000				
2. MA7-3 Brickenwood	Replace Roofs	1460	25	\$100,000				
3. MA7-4 Westlawn	Roof replacement	1460	25	\$100,000				
4. MA7-7 Hillside	Unit Consolidation	1460	3	\$75,000				
	Electrical Improvements	1460	47	\$40,000				
5. MA-7-6 Boa Vista	Electrical Improvements	1460	100	\$75,000				
	Boiler Replacement	1460	2	\$100,000				
6. MA-7-10 Caroline St.	Site Security: Lighting, fencing, access.	1450	64	\$50,000				
7. MA-7-10 Shawmut Village	Exterior Siding	1460	170	\$500,000				
	Electrical Improvements for stoves	1460	170	\$75,000				
	Gas line replacement	1450	43	\$50,000				
8. MA-7-10 Satellite Village	Exterior Siding	1460	146	\$500,000				
	Electrical Improvements for stoves	1460	170	\$75,000				
	Gas line replacement	1450	43	\$50,000				
9. MA-7-11 Chaffee Fairfield	Exterior Siding/ replace cellar stairs and doors	1460	16	\$300,000				
10. MA7-21	Repairs to exterior envelope	1460	43	\$195,000				

<b>Annual Statement/Performance and Evaluation Report</b>								
<b>Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)</b>								
<b>Part II: Supporting Pages</b>								
PHA Name: New Bedford Housing Authority			<b>Grant Type and Number</b> Capital Fund Program Grant No: MA06-P00750203 Replacement Housing Factor Grant No:			<b>Federal FY of Grant:</b> FY2003		
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
11. PHA wide								
PHA wide	a) Emergency funds for unforeseen repairs/replacements to heating systems	1460		\$50,000				
MA 7-7 MA 7-10	b) Implement upgrades for baths/kitchens in anticipation of unit modernization MA7-10, MA7-7	1460		\$75,000				
PHA wide	c) Replacement of stoves	1465.1		\$55,000				
PHA wide	d) Emergency roof repairs	1460		\$20,000				
PHA wide	e) Vacancy reduction: independent contractors renovating units at turnover	1460		\$90,000				
PHA wide	f) Refrigerator replacement of defective HUD/DOE approved Maytags	1465.1		\$42,000				
12. PHA wide	a) Pre-screening to reduce unit turnover	1408		\$53,000				
Management	b) Security coordination & oversight	1408		\$40,000				
13. PHA wide	a) Modernization Office salaries & benefits	1410		\$402,014				
Administration	b) administration costs	1410		\$30,000				
14. Fees & Costs	a) Hillside Ct. Electrical Engineering	1430		\$5,000				
	b) Boa Vista Electrical Engineering	1430		\$10,000				
	c) Chaffee Fairfield	1430		\$50,000				
	c) Shawmut Village	1430		\$77,500				
	d) Satellite Village	1430		\$77,500				
	e) Shawmut electrical engineering	1430		\$15,000				
	f) Satellite electrical engineering	1430		\$15,000				

<b>Annual Statement/Performance and Evaluation Report</b> <b>Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)</b> <b>Part II: Supporting Pages</b>								
PHA Name: New Bedford Housing Authority		<b>Grant Type and Number</b> Capital Fund Program Grant No: MA06-P00750203 Replacement Housing Factor Grant No:				<b>Federal FY of Grant: FY2003</b>		
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
15. Operations	Operations	1406		\$350,000				
16. PHA-Wide	Contingency	1502		\$278,128				

<b>Annual Statement/Performance and Evaluation Report</b>							
<b>Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)</b>							
<b>Part III: Implementation Schedule</b>							
PHA Name: New Bedford Housing Authority		<b>Grant Type and Number</b> Capital Fund Program No: MA06-P00750202 Replacement Housing Factor No:				<b>Federal FY of Grant: 2003</b>	
Development Number Name/HA-Wide Activities	All Fund Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)			Reasons for Revised Target Dates
	Original	Revised	Actual	Original	Revised	Actual	
1. MA7-1 Bay Village	12/31/2004			6/30/2006			
2. MA7-2 Pres Hgts	12/31/2004			6/30/2006			
3. MA7-3 Brickenwood	12/31/2004			6/30/2006			
4. MA7-4 Westlawn	12/31/2004			6/30/2006			
5. MA7-6 Boa Vista	12/31/2004			6/30/2006			
6. MA7-7 Hillside	12/31/2004			6/30/2006			
7. MA7-8 Harwich Manor	12/31/2004			6/30/2006			
8. MA7-8 Mosher Street	12/31/2004			6/30/2006			
9. MA7-10 Shawmut	12/31/2004			6/30/2006			
10. MA7-10 Satellite	12/31/2004			6/30/2006			
11. MA7-10 Caroline St.	12/31/2004			6/30/2006			
12. MA7-11 Chafee Farefield	12/31/2004			6/30/2006			
13. MA7-11 Adams	12/31/2004			6/30/2006			
14. MA7-12 Dottin Place	12/31/2004			6/30/2006			
15. MA7-21 Scattered	12/31/2004			6/30/2006			
16. PHA wide	12/31/2004			6/30/2006			
17. PHA wide Manage	12/31/2004			6/30/2006			
18. PHA wide Admin	12/31/2004			6/30/2006			
19. Fees & Costs	12/31/2004			6/30/2006			
20. Operations	12/31/2004			6/30/2006			

**Capital Fund Program Five-Year Action Plan  
Part I: Summary**

PHA Name New Bedford Housing Authority		<input checked="" type="checkbox"/> <b>Original 5-Year Plan</b> <input type="checkbox"/> <b>Revision No:</b>			
Development Number/Name/HA-Wide	Year 1	Work Statement for Year 2 FFY Grant: 2004 PHA FY:	Work Statement for Year 3 FFY Grant: 2005 PHA FY:	Work Statement for Year 4 FFY Grant: 2006 PHA FY:	Work Statement for Year 5 FFY Grant: 2007 PHA FY:
	Annual Statement				
MA7-1 Bay Village		\$505,000	\$0	\$534,357	\$0
MA7-2 Presidential Heights		\$770,142	\$1,044,714	\$519,357	\$0
MA7-3 Brickenwood		\$0	\$1,029,714	\$519,357	\$479,357
MA7-4 Westlawn		\$0	\$1,056,714	\$519,357	\$519,357
MA7-6 Boa Vista		\$0	\$0	\$0	\$0
MA7-7 Hillside Court		\$75,000	\$0	\$0	\$0
MA7-8 Mosher Street		\$0	\$0	\$0	\$0
MA7-10 Shawmut Village		\$881,000	\$0	\$519,357	\$1,093,714
MA7-10 Satellite Village		\$900,000	\$0	\$519,357	\$1,038,714
MA7-10 Caroline Street		\$0	\$0	\$0	\$0
MA7-11 Chaffee/Fairfield St		\$0	\$0	\$0	\$0
MA7-12 Dottin Place		\$0	\$0	\$0	\$0
MA7-21 Scattered Site		\$0	\$0	\$0	\$0
MA7-22 Dottin Place II		\$0	\$0	\$0	\$0
PHA Wide		\$170,000	\$170,000	\$170,000	\$170,000
Management Improvements		\$93,000	\$93,000	\$93,000	\$93,000
Administration		\$432,000	\$432,000	\$432,000	\$432,000
Contingency		\$203,000	\$203,000	\$203,000	\$203,000
Operations		\$291,000	\$291,000	\$291,000	\$291,000

CFP Funds Listed for 5-year planning		\$4,320,142	\$4,320,142	\$4,320,142	\$4,320,142
Replacement Housing Factor Funds					

**Capital Fund Program Five-Year Action Plan  
Part II: Supporting Pages—Work Activities**

Activities for Year 1	Activities for Year : <u>2</u> FFY Grant: 2004 PHA FY:			Activities for Year: <u>3</u> FFY Grant: 2005 PHA FY:		
	Development Name/Number	Major Work Categories	Estimated Cost	Development Name/Number	Major Work Categories	Estimated Cost
See	MA7-1 Bay Village	Interior Modernization: Kitchens and baths	\$505,000	MA7-2 Presidential Heights	reconfigure drives, walkways and open areas	\$1,044,714
Annual	MA7-2 Presidential Heights	Interior Modernization: Kitchens and baths	\$770,142	MA7-3 Brickenwood	reconfigure drives, walkways and open areas	\$1,029,714
Statement	MA7-7 Hillside Court	Reconfigure Units	\$75,000	MA7-4 Westlawn	reconfigure drives, walkways and open areas	\$1,056,714
	MA7-10 Shawmut Village	Heat/DHW replacement	\$300,000			
		interior modernization	\$581,000			
	MA7-10 Satellite Village	Heat/DHW replacement	\$210,000			
		interior modernization	\$690,000			
	PHA wide	vacancy reduction	\$40,000	PHA wide	vacancy reduction	\$40,000
		stove replacement	\$55,000		stove replacement	\$55,000
		emergency roof repairs	\$25,000		emergency roof repairs	\$25,000
		emergency site/hazards repairs	\$25,000		emergency site/hazards repairs	\$25,000
		emergency heating/furnace repairs	\$25,000		emergency heating/furnace repairs	\$25,000

	PHA wide management	a) Tenant pre-screening to reduce unit turnover	\$53,000	PHA wide management	a) Tenant pre-screening to reduce unit turnover	\$53,000
		b) Security initiatives to enhance operations and reduce vandalism	\$40,000		b) Security initiatives to enhance operations and reduce vandalism	\$40,000
	Administration	Administration	432,000	Administration	Administration	432,000
	Operations	Operations	\$291,000	Operations	Operations	\$291,000
	Contingency	Contingency	203,000	Contingency	Contingency	203,000
<b>Total CFP Estimated Cost</b>			<b>\$4,320,142</b>			<b>\$4,320,142</b>

**Capital Fund Program Five-Year Action Plan  
Part II: Supporting Pages—Work Activities**

Activities for Year : <u>  4  </u> FFY Grant: 2006 PHA FY:			Activities for Year: <u>  5  </u> FFY Grant: 2007 PHA FY:		
Development Name/Number	Major Work Categories	Estimated Cost	Development Name/Number	Major Work Categories	Estimated Cost
MA7-1 Bay Village	comprehensive site/parking improvements	\$534,357	MA7-3 Brickenwood	comprehensive site/parking improvements	\$479,357
MA7-2 Presidential Heights	comprehensive site/parking improvements	\$519,357	MA7-4 Westlawn	comprehensive site/parking improvements	\$519,357
MA7-3 Brickenwood	comprehensive site/parking improvements	\$519,357	MA7-10 Shawmut Village	comprehensive site/parking improvements	\$1,093,714
MA7-4 Westlawn	comprehensive site/parking improvements	\$519,357	MA7-10 Satellite Village	comprehensive site/parking improvements	\$1,038,714
MA7-10 Shawmut Village	comprehensive site/parking improvements	\$519,357			
MA7-10 Satellite Village	comprehensive site/parking improvements	\$519,357			
PHA wide	vacancy reduction	\$40,000	PHA wide	vacancy reduction	\$40,000
	stove replacement	\$55,000		stove replacement	\$55,000
	emergency roof repairs	\$25,000		emergency roof repairs	\$25,000

	emergency site/hazards repairs	\$25,000		emergency site/hazards repairs	\$25,000
	emergency heating/furnace repairs	\$25,000		emergency heating/furnace repairs	\$25,000
PHA wide management	a) Tenant pre-screening to reduce unit turnover	\$53,000	PHA wide management	a) Tenant pre-screening to reduce unit turnover	\$53,000
	b) Security initiatives to enhance operations and reduce vandalism	\$40,000		b) Security initiatives to enhance operations and reduce vandalism	\$40,000
Administration	Administration	\$432,000	Administration	Administration	432,000
Operations	Operations	\$291,000	Operations	Operations	\$291,000
Contingency	Contingency	\$203,000	Contingency	Contingency	\$203,000
<b>Total CFP Estimated Cost</b>		<b>\$4,320,142</b>			<b>\$4,320,142</b>

# **ATTACHMENT E**

MA007e02

## **COMMENTS OF RESIDENT ADVISORY BOARD**

**The Resident Advisory Board has reviewed the Annual Plan for Fiscal Year 2003 and the Five-Year Plan for Fiscal Years 2003 - 2007 and offered no suggestive changes.**

# **ATTACHMENT F**

**MA007f02**

## **DESIGNATE BOA VISTA AS ELDERLY ONLY**

(HUD-9014)

10/3/02

The following resolution was introduced by Bruce J. Oliveira, read in full, and considered:

**RESOLUTION NO. 103 - 02**

***BE IT RESOLVED by the members of the New Bedford Housing Authority to approve the Declaration that Boa Vista, MA 7-6, is an Elderly Only Housing Development.***

Richard T. Saunders moved that the foregoing resolution be adopted as introduced and read. Melvin L. Davis seconded the motion; and upon roll call, the Ayes and Nays were as follows:

AYES

NAYS

Cynthia A. Barboza  
Melvin L. Davis  
Leona J. Fisher  
Bruce J. Oliveira  
Richard T. Saunders

None

The Chairman thereupon declared the said motion carried and the said resolution adopted.

\*\*\*\*\*

There being no further business to come before the meeting, upon motion duly made and seconded, the meeting was adjourned.

# **ATTACHMENT G**

MA007g02

# **PET POLICY AND AGREEMENT**

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## NEW BEDFORD HOUSING AUTHORITY

### OPERATIONS MANUAL

**DATE:** January 1, 2001

**Release No. 76**

**TO:** ALL EMPLOYEES and RESIDENTS OF THE NBHA

**SUBJECT:** PET POLICY

**REPLACES:** No Prior Operations Manual Release. This policy replaces all previous policy statements or documentation pertaining to pets, which are inconsistent with this policy document.

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The following regulations governing animals on NBHA property (Federal) have been developed in compliance with the Quality Housing and Work Responsibility Act of 1998. Also considered, are the safe and humane treatment of pets and the quality of life issues of NBHA residents and neighbors.

Residents of the NBHA who wish to keep common household pets must notify the Property Management Office in writing. A **NBHA Pet Policy AGREEMENT** (*on page 4*) must be signed by the **Resident** and approved by the **Senior Property Manager** before animals are allowed on Housing Authority property.

Each Resident Pet Owner must provide the name, address, and phone number of the veterinarian responsible for the pet's health care, along with a photo of the pet, pet license, rabies tag, and proof of spaying or neutering. A pet **must** be at least six months of age with all stated requirements satisfied before the pet is approved / allowed on NBHA property. A personal liability insurance policy is strongly recommended by the NBHA for all pet owners.

A pet security deposit of \$160.00 or one months rent (whichever amount is less) is required from each Resident Pet Owner to be kept in an escrow account for damage caused by a pet. Any unused portion will be refunded plus the accrued interest. A non-refundable fee for operating cost of \$50.00 will be charged to the Resident Pet Owner's account each year.

Resident Pet Owner's responsibilities include but are not limited to:

- *Maintaining his/her pet responsibly and in accordance with applicable state and local public health, animal control, and animal anti-cruelty laws and regulations and in accordance with the NBHA Pet Policy.*
- *Providing adequate care for the pet at all times.*
- Registering his/her pet with the Property Management Office along with an identifying description of the animal and the adult household member who will be primarily responsible for the animal's care.
- Assuring his/her pet is at least six months old and does not exceed eighteen (18) pounds by adulthood. Cats are exempt from this requirement.
- Immediately cleaning up the animal feces of his/her pet inside the apartment or on any other NBHA property.
- Keeping pets restrained on a leash **at all times** when outside of the housing unit and on NBHA property. Pets are not to be leashed or tied to any NBHA fences, buildings, railings, clothesline poles, or the like. A pet leash is not to exceed seven (7) feet in length.
- Assuring his/her pet does not annoy other tenants or neighbors by excessive barking or other noise.

- Keeping his/her pet free of pests, such as ticks or fleas. A Resident Pet Owner will be responsible for any extermination required as a result of his/her pet.
- Having a current license, rabies tag, and the NBHA color tag on his/her pet's collar at all times.
- Assuring his/her pet is not left unattended outside of an apartment on NBHA property at any time. Pets are not to be left unattended in an apartment for more than a twelve-hour period.
- Providing the name of the household member who can and will return home if the animal experiences distress or causes a disturbance when left alone. The Resident Pet Owner is responsible for providing adequate care for the pet at all times.
- Reporting **all** animal bites to the Property Management Office and Police Department immediately.
- The regular removal and replacement of litter used in litter boxes or in portable animal enclosures within the dwelling unit so as to comply with all health requirements.

Common household pets **do not** include:

- Animals who would be allowed to produce offspring for sale.
- Wild animals, feral animals, and any other animals who are unamenable to routine human handling or who pose a threat to children and the elderly, such as ferrets, foxes, skunks, squirrels, coyotes and groundhogs. These animals are not to be fed or welcomed on NBHA property.
- Reptiles, such as snakes, turtles, lizards, and iguanas who pose a significant risk of salmonella to those who handle them.
- Animals of species commonly used or found on farms, such as ducks, baby chicks, chickens or pot-bellied pigs.
- Non-human primates, such as monkeys.
- Pigeons, doves, mynah birds, psittacine birds, and birds of other species that are host to the organisms causing psittacosis in humans. Pigeons, doves, seagulls are not to be fed on NBHA property.
- Vicious animals as defined by city ordinance, state law, and/or insurance providers.
- Dogs such as Pit Bulls/Staffordshire Terriers, Rottweiler, Chow, Boxer breeds, German Shepherd, and Doberman Pinscher, and/or dogs of similar temperament. These **are not** allowed on NBHA property.

The responsibilities of Management in dealing with quality-of-life issues for public housing residents include but are not limited to:

- Protecting the health, safety, and quiet enjoyment of public housing residents in a relatively dense housing environment where a companion animal may be allowed.
- Informing a Resident Pet Owner, in writing, of any allegations of violations of the NBHA Pet Policy.
- Prohibiting the keeping of any animal on NBHA property by any resident who is charged with or has been convicted of cruelty to an animal.
- The strict enforcement of the NBHA Pet Policy up to and including the right of Management to seek impoundment and sheltering of any animal found to be in violation of NBHA rules, pending resolution of any dispute regarding such violation.

- Enforcing the prohibition of keeping any dog in any dwelling unit contained in a building structure that is not contiguous with an outdoor common area measuring at least four hundred (400) square feet in area.
- Accepting a written request for a second animal only if the animal is compatible with the first and only if the dwelling unit has an area spanning at least eleven hundred (1100) square feet.
- The annual review by each respective Property Manager with the Resident Pet Owner of:
  - each animal's registration, if applicable, including a copy of the annual veterinary examination.
  - documentation of current rabies vaccination
  - copy of the license issued by the City of New Bedford
  - name and telephone number of the veterinarian who provides care to the animal

**If a pet constitutes an immediate, serious threat to health or safety, Management may have the pet removed immediately.**

Whenever it is reasonably determined that a pet constitutes a **non-immediate threat** to the health or safety of public housing residents, or otherwise creates a nuisance which disturbs the rights, comfort, peace, and quiet enjoyment of other residents, or if the owner of the pet becomes incapacitated or unable to care for the pet, after receipt of a written demand from Management, the Resident Pet Owner may request a meeting with the Pet Committee.

If the Pet Committee, for whatever reason, is unable or unwilling to reach a decision in the matter within forty-five (45) days of the request for a meeting by the Resident, Management may make a reasonable determination as to whether the pet is a threat to the health or safety of the public housing residents or causes a nuisance which disturbs the rights, comfort, peace, and quiet enjoyment of public housing residents and take appropriate remedial action. Management may also make the reasonable determination whether the Resident is able to care for the pet.

The Pet Committee shall be comprised of five members selected by the Resident Advisory Board and shall include at least one member of the NBHA staff, one member of the NBHA Resident Advisory Board, one NBHA Resident Pet Owner, one NBHA non-pet owner, and one member with veterinary and/or pet obedience training experience.

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Joseph S. Finnerty  
Executive Director

***Please see attached PET POLICY AGREEMENT to be signed by Resident and NBHA Senior Property Manager.***

## NEW BEDFORD HOUSING AUTHORITY

### PET POLICY AGREEMENT

#### To be attached to lease

I \_\_\_\_\_ do hereby agree to comply with all rules and  
(Resident)  
regulations of the New Bedford Housing Authority Pet Policy, Operations Release No. 76.

1. Both parties have read and signed the Pet Policy. If the resident's pet ownership deposit does not cover damages caused by the pet, the resident will be responsible for any additional charges under terms of the housing lease.
2. Management will inform a resident of any complaints or violations it receives concerning a resident's pet and reserves the right to enter a dwelling unit when there is evidence that an animal left alone is in danger or distress.
3. An animal shall be removed from a dwelling unit and impounded in the event of a maintenance emergency that requires immediate attention and the resident pet owner is not present or when scheduled maintenance work cannot be performed because of the animal.
4. The resident is responsible for providing adequate care for the pet at all times.
5. The resident is responsible for maintaining the pet responsibly and in accordance with applicable state and local public health, animal control, and animal anti-cruelty laws and regulations, and in accordance with the NBHA Pet Policy.
6. Failure to comply with the NBHA Pet Policy will be cause for eviction of the resident for violation of the Lease.
7. It is fully understood that each and every rule and regulation contained in the Pet Policy of the NBHA will be strictly enforced to ensure the safe and humane treatment of pets, while providing for the quality of life issues of our residents and neighbors.

\_\_\_\_\_  
**DATE**

\_\_\_\_\_  
**RESIDENT**

\_\_\_\_\_  
**DATE**

\_\_\_\_\_  
**NEW BEDFORD HOUSING AUTHORITY**

**BY:** \_\_\_\_\_

**SIGNATURE**

\_\_\_\_\_  
**SENIOR PROPERTY MANAGER**

# ATTACHMENT H

MA007h02

## STATEMENT OF PROGRESS IN MEETING 5-YEAR PLAN MISSION AND GOALS

Please refer to the objectives listed on Pages 1 through 3 of the New Bedford Housing Authority's "5-Year Plan" for Fiscal Years 2003 – 2007.

Applicable status notations of *applied*, *reduced*, *ongoing*, *completed*, and *underway* are typed next to each checked objective.

# **ATTACHMENT I**

MA007i02

## **RESIDENT MEMBERSHIP ON BOARD OF COMMISSIONERS OF NEW BEDFORD HOUSING AUTHORITY**

Mr. Melvin L. Davis, a New Bedford Housing Authority resident, was appointed to the New Bedford Housing Authority Board of Commissioners by Mayor Frederick M. Kalisz, Jr. Mr. Davis was confirmed by the City Council on September 14, 2000, and took his oath that same day. His term expires December 31, 2003.

# **ATTACHMENT J**

MA007j02

# **RESIDENT ADVISORY BOARD MEMBERS**

## 2002 - 2003 RESIDENT ADVISORY BOARD

### NEW BEDFORD HOUSING AUTHORITY

Member Housing Developments: Bay Village; Presidential Heights; Brickenwood; Westlawn; Boa Vista; Hillside Court; Mosher Street; Harwich Manor; Shawmut Village; Satellite Village; Caroline Apartments; Chaffee Street; Adams Street; Dottin Place I; Dottin Place II; and Scattered Sites.

**Chairperson:** Rosemarie Stolmieir  
**Vice-Chairperson:** Carolyn Smodics  
**Secretary:** Anita Burke

#### MEMBERS: (Voting Members)

<b>Muriel Barksdale</b>	Caroline Apts.	20 Parker St. Ct.	NB 02740	992-1032
<b>Theresa Fortin</b>	Caroline Apts	40 Caroline St.	NB 02740	994-7280
<b>Paul Pelletier</b>	Boa Vista(504)	134 So. Second St.	NB 02740	555-1234
<b>Mark Sylvia</b>	Boa Vista(614)	134 So. Second St.	NB 02740	no phone
<b>Theresa Burke</b>	Boa Vista(208)	134 So. Second St	NB 02740	no phone
<b>June Evora</b>	Dottin Place	21 Amanda Ave.	NB 02745	998-7210
<b>Rosemarie Stolmieir</b>	Satellite	31 Apollo Dr.	NB 02745	995-1130
<b>Anita Burke</b>	Bay Village	126 Griffin Ct.	NB 02740	994-5709
<b>Carolyn Smodics</b>	Scattered	33 New Plainville	NB 02745	998-8944
<b>Emilio Cruz</b>	Pres. Hts.	329 Myrtle St.	NB 02746	990-1792
<b>Heidi Mendes</b>	Satellite	23 Apollo Dr.	NB 02745	998-2107

# **ATTACHMENT K**

MA007k02

# **DESIGNATE CAROLINE STREET AS ELDERLY ONLY**

(HUD-9014)

4/5/01

The following resolution was introduced by Cynthia A. Barboza, read in full, and considered:

**RESOLUTION NO. 41 - 01**

***BE IT RESOLVED by the members of the New Bedford Housing Authority to approve the Declaration that Caroline Street Housing Development, MA 7-10, is an Elderly Only Housing Development.***

Richard T. Saunders moved that the foregoing resolution be adopted as introduced and read; and upon roll call, the Ayes and Nays were as follows:

AYES

NAYS

Cynthia A. Barboza  
Melvin L. Davis  
Bruce J. Oliveira  
Richard T. Saunders

None

The Chairman thereupon declared the said motion carried and the said resolution adopted.

\*\*\*\*\*

There being no further business to come before the meeting, upon motion duly made and seconded, the meeting was adjourned.

# **ATTACHMENT L**

**MA007102**

## **SECTION 8 HOMEOWNERSHIP PROGRAM**

## ADMINISTRATIVE PLAN

### SECTION XXIII. SECTION 8 HOME OWNERSHIP PROGRAM

#### 1. GENERAL PROVISIONS.

The Section 8 Homeownership Program of the New Bedford Housing Authority ("NBHA") permits eligible participants in the Section 8 housing choice voucher program, including participants with portable vouchers, the option of purchasing a home with their Section 8 assistance rather than renting. The homeownership option is limited to five percent (5%) of the total Section 8 voucher program administered by NBHA in any fiscal year, provided that disabled families shall not be subject to the 5% limit. Eligible applicants for the Section 8 Homeownership Program must have completed an initial Section 8 lease term, may not owe NBHA or any other Housing Authority an outstanding debt, and must meet the eligibility criteria set forth herein. Section 8 homeownership assistance may be used to purchase the following type of homes within the jurisdiction of the NBHA, new or existing single-family, condominium, planned use developments, cooperatives, lofts, live/work units, or manufactured homes. NBHA also will permit portability of Section 8 homeownership assistance to another jurisdiction, provided the receiving jurisdiction operates a Section 8 Homeownership Program for which the Section 8 homeownership applicant qualifies or authorizes NBHA to administer the homeownership assistance in their jurisdiction.

#### 2. FAMILY ELIGIBILITY REQUIREMENTS.

Participation in the Section 8 Homeownership Program is voluntary. Each Section 8 homeownership participant must meet the general requirements for admission to the Section 8 housing choice voucher program as set forth in NBHA's Administrative Plan. Such Section 8 family also must be "eligible" to participate in the Homeownership Program. The additional eligibility requirements for participation in NBHA's Section 8 Homeownership Program include that the family must: (A) be a first-time homeowner or have a member who is a person with disabilities; (B) with the exception of elderly and disabled households, meet a minimum income requirement without counting income from "welfare assistance" sources; (C) with the exception of elderly and disabled households, meet the requisite employment criteria; (D) have completed an initial lease term in the Section 8 housing choice voucher program; (E) have fully repaid any outstanding debt owed to NBHA or any other Housing Authority; (F) not defaulted on a mortgage securing debt to purchase a home under the homeownership option; and (G) not have any member who has a present ownership interest in a residence at the commencement of homeownership assistance.

##### ***A. First-Time Homeowner.***

Each Section 8 family, except families with a disabled member, must be a first-time homeowner. A "first-time homeowner" means that no member of the household has had an ownership interest in any residence during the three years preceding commencement of homeownership assistance. However, a single parent or displaced homemaker who, while married, owned a home with a spouse (or resided in a home owned by a spouse) is considered a "first-time homeowner" for purposes of the Section 8 homeownership

option; and the right to purchase title to a residence under a lease-purchase agreement is not considered an "ownership interest." A member of a cooperative (as defined in § 982.4) also qualifies as a "first time homeowner".

***B. Minimum Income Requirement.***

- (1) Amount of Income. At the time the family begins receiving homeownership assistance, the head of household, spouse, and/or other adult household members who will own the home, must have a gross annual income at least equal to the Federal minimum hourly wage multiplied by 2000 hours.
- (2) Exclusion of Welfare Assistance Income. With the exception of elderly and disabled families, NBHA will disregard any "welfare assistance" income in determining whether the family meets the minimum income requirement. Welfare assistance includes assistance from Transitional Assistance to Families with Dependant Children("TAFDC"); Supplemental Security Income ("SSI") that is subject to an income eligibility test; food stamps; general assistance, Transitional Emergency Assistance to Elderly, Disabled and Children ("TEAEDC"); or other welfare assistance specified by HUD. The disregard of welfare assistance income under this section affects the determination of minimum monthly income in determining initial qualification for the Homeownership Program. It does not affect the determination of income-eligibility for admission to the Section 8 housing choice voucher program, calculation of the family's total tenant payment, or calculation of the amount of homeownership assistance payments.

***C. Employment History.***

With the exception of disabled and elderly households, each family must demonstrate that one or more adult members of the family who will own the home at commencement of homeownership assistance is employed full-time (an average of 30 hours per week) and has been so continuously employed for one year prior to execution of the sales agreement. In order to reasonably accommodate a family's participation in the program, NBHA will exempt families that include a person with disabilities from this requirement. NBHA's Executive Director may also consider whether and to what extent an employment interruption is considered permissible in satisfying the employment requirement. The Executive Director may also consider successive employment during the one-year period and self-employment in a business.

***D. Completion of Initial Lease Term.***

Applicants for and new participants in the Section 8 housing choice voucher program shall be ineligible for participation in the Section 8 Homeownership Program until completion of an initial Section 8 lease term and the participant's first annual re-certification in the Section 8 housing choice voucher program. Nothing in this provision will preclude Section 8 participants that have completed an initial lease term in another jurisdiction from participating in the Section 8 Homeownership Program.

***E. Repayment of Any Housing Authority Debts.***

Participants in the Section 8 housing choice voucher program shall be ineligible for participation in the Section 8 Homeownership Program in the event any debt or portion of

a debt remains owed to NBHA or any other Housing Authority. Nothing in this provision will preclude Section 8 participants that have fully repaid such debt(s) from participating in the Section 8 Homeownership Program.

**F. Additional Eligibility Factors.**

1. Elderly and Disabled Households. Elderly and disabled families are exempt from the employment requirements set forth in Section 2. C. above. In the case of an elderly or disabled family, NBHA will consider income from all sources, including welfare assistance in evaluating whether the household meets the minimum income required to purchase a home through the Section 8 Homeownership Program.
2. Prior Mortgage Defaults. If a head of household, spouse, or other adult household member who will execute the contract of sale, mortgage and loan documents has previously defaulted on a mortgage obtained through the Section 8 Homeownership Program, the family will be ineligible to participate in the Homeownership Program.

**3. FAMILY PARTICIPATION REQUIREMENTS.**

Once a family is determined to be eligible to participate in the program, it must comply with the following additional requirements: (A) complete a homeownership counseling program approved by NBHA prior to commencement of homeownership assistance; (B) within a specified time, locate the home it proposes to purchase; (C) submit a sales agreement containing specific components to NBHA for approval; (D) allow NBHA to inspect the proposed homeownership dwelling to assure that the dwelling meets appropriate housing quality standards; (E) obtain an independent inspection covering major building systems; (F) obtain NBHA approval of the proposed mortgage (which must comply with generally accepted mortgage underwriting requirements); and (G) enter into a written agreement with NBHA to comply with all of its obligations under the Section 8 program.

***A. Homeownership Counseling Program.***

A family's participation in the Homeownership Program is conditioned on the family attending and successfully completing a homeownership and housing counseling program provided or approved by NBHA prior to commencement of homeownership assistance. The homeownership and counseling program will cover home maintenance; fair housing, RESPA obligations and predatory lending issues budgeting and money management; credit counseling; negotiating purchase price; securing mortgage financing; finding a home; and the advantages of purchasing and locating homes in areas that do not have a high concentration of low-income families. The counseling agency providing the counseling program shall either be approved by HUD or the program shall be consistent with the homeownership counseling provided under HUD's Housing Counseling program. NBHA may require families to participate in a NBHA-approved homeownership counseling program on a continuing basis.

***B. Locating and Purchasing a Home.***

- (1) Locating A Home Upon approval for the Section 8 Homeownership Program, a family shall have one hundred eighty (180) days to locate a home to purchase. A home shall be considered located if the family submits a proposed sales agreement

with the requisite components to NBHA. For good cause, NBHA may extend a Section 8 family's time to locate the home for additional thirty (30) day increments. During a Section 8 participant's search for a home to purchase, their Section 8 rental assistance shall continue pursuant to the Administrative Plan. If a Section 8 participant family is unable to locate a home within the time approved by NBHA, their Section 8 rental assistance through the Section 8 housing choice voucher program shall continue.

- (2) **Type of Home.** A family approved for Section 8 homeownership assistance may purchase the following type of homes within the City of New Bedford\*\*\*\*\*: a new or existing home, a single-family home, a condominium, a home in a planned use development, a cooperative, a loft or live/work unit, or a manufactured home to be situated on a privately owned lot or on a leased pad in a mobile home park. The home must be already existing or under construction at the time NBHA determines the family eligible for homeownership assistance to purchase the unit. The family also may purchase a home in a jurisdiction other than the City of New Bedford, provided the Housing Authority in the receiving jurisdiction operates a Section 8 Homeownership Program for which the Section 8 homeownership applicant qualifies or authorizes NBHA to administer the homeownership assistance in their jurisdiction. In the former case, a family's participation in the Section 8 Homeownership Program will be subject to the Section 8 Homeownership Program and policies of the receiving jurisdiction.
- (3) **Purchasing a Home.** Once a home is located and a sales agreement approved by NBHA is signed by the family, the family shall have up to three (3) months, or such other time as is approved by NBHA's Executive Director or set forth in the NBHA-approved sales agreement, to purchase the home.
- (4) **Failure to Complete Purchase.** If a Section 8 participant is unable to purchase the home within the maximum time permitted by NBHA, NBHA shall continue the family's participation in the Section 8 housing choice voucher program. The family may not re-apply for the Section 8 Homeownership Program until they have completed an additional year of participation in the Section 8 housing choice voucher program following the initial determination of their eligibility for the homeownership option.
3. **Lease-Purchase** Families may enter into lease-purchase agreements while receiving Section 8 rental assistance. All requirements of the housing choice voucher program apply to lease-purchase agreements, except that families are permitted to pay an extra amount out-of-pocket to the owner for purchase related expenses-- a "homeownership premium." Any "homeownership premium," defined as an increment of value attributable to the value of the lease-purchase right or agreement, is excluded from NBHA's rent reasonableness determination and subsidy calculation, and must be absorbed by the family. When a lease-purchase participant family is ready to exercise their option, they must notify the Homeownership Counselor at NBHA and apply for the homeownership option. If determined eligible for homeownership assistance, the family may be admitted to the Homeownership Program and must meet all the requirements of these policies.

***C. Sales Agreement.***

Prior to execution of the offer to purchase or sales agreement, the financing terms must be provided by the family to NBHA for approval. The sales agreement must provide for inspection by NBHA and the independent inspection referred to in Section 3(E) and must state that the purchaser is not obligated to purchase unless such inspections are satisfactory to NBHA. The contract also must provide that the purchaser is not obligated to pay for any necessary repairs without approval by NBHA. The sales agreement must provide that the purchaser is not obligated to purchase if the mortgage financing terms are not approved by NBHA pursuant to Section 3(F). The sales agreement must also contain a seller certification that the seller is not debarred, suspended, or subject to a limited denial of participation under 24 CFR part 24.

***D. Independent Initial Inspection Conducted.***

To assure the home complies with the housing quality standards of the Section 8 program, homeownership assistance payments may not commence until NBHA first inspects the home. An independent inspection of existing homes covering major building systems also must be completed by a professional selected by the family and approved by NBHA. NBHA will not pay for the independent inspection. The independent inspection report must be provided to NBHA. NBHA may disapprove the unit due to information contained in the report or for failure to meet federal housing quality standards.

***E. Financing Requirements.***

The proposed financing terms must be submitted to and approved by NBHA prior to close of escrow. NBHA shall determine the affordability of the family's proposed financing. In making such determination, NBHA may take into account other family expenses, including but not limited to child care, unreimbursed medical expenses, education and training expenses and the like. Certain types of financing, including but not limited to, balloon payment mortgages, unless convertible to a variable rate mortgage, are prohibited and will not be approved by NBHA. Seller-financing mortgages shall be considered by NBHA on a case by case basis. If a mortgage is not FHA-insured, NBHA will require the lender to comply with generally accepted mortgage underwriting standards consistent with those of HUD/ FHA, Ginnie Mae, Fannie Mae, Freddie Mac, California Housing Finance Agency (CHFA), USDA Rural Housing Services, the Federal Home Loan Bank, or other private lending institution.

***F. Compliance With Family Obligations.***

A family must agree, in writing, to comply with all family obligations under the Section 8 program and NBHA's homeownership policies. These obligations include (1) attending ongoing homeownership counseling, if required by NBHA; (2) complying with the mortgage terms; (3) not selling or transferring the home to anyone other than a member of the assisted family who resides in the home while receiving homeownership assistance; (4) not refinancing or adding debt secured by the home without prior approval by NBHA; (5) not obtaining a present ownership interest in another residence while receiving homeownership assistance; and (6) supplying all required information to NBHA, including but not limited to annual verification of household income, notice of

change in homeownership expenses, notice of move-out, and notice of mortgage default. NBHA's Homeownership Family Obligation policies are set forth in Appendix A hereto.

***G. Compliance Lien***

Upon purchase of a home, the family must execute documentation as required by HUD and NBHA, consistent with State and local law, securing NBHA's right to recapture the homeownership assistance in accordance with Section 5. C. below. The lien securing the recapture of homeownership subsidy may be subordinated to a refinanced mortgage.

**4. AMOUNT OF ASSISTANCE.**

The amount of the monthly assistance payment will be based on three factors: the voucher payment standard for which the family is eligible; the monthly homeownership expense; and the family's household income. NBHA will pay the lower of either the payment standard minus the total family contribution ("TFC") or the family's monthly homeownership expenses minus the TFC. The Section 8 family will pay the difference.

***A. Determining the Payment Standard.***

The voucher payment standard is the fixed amount the NBHA annually establishes as the "fair market" rent for a unit of a particular size located within the NBHA jurisdiction. In the Homeownership Program, the initial payment standard will be the lower of either (1) the payment standard for which the family is eligible based on family size; or (2) the payment standard which is applicable to the size of the home the family decides to purchase. The payment standard for subsequent years will be based on the higher of: (1) the payment standard in effect at commencement of the homeownership assistance; or (2) the payment standard in effect at the most recent regular reexamination of the family's income and size. The initial payment standard, for purposes of this comparison, shall not be adjusted even if there is a subsequent decrease in family size. NBHA will request HUD approval of a higher payment standard, up to 120% of the published Fair Market Rent limit, where warranted as a reasonable accommodation for a family that includes a person with disabilities.

***B. Determining the Monthly Homeownership Expense.***

Monthly homeownership expense includes all of the following: principal and interest on the initial mortgage and any mortgage insurance premium (MIP) incurred to finance the purchase and any refinancing of such debt; real estate taxes and public assessments; homeowner's insurance; maintenance expenses per NBHA allowance; costs of major repairs and replacements per NBHA allowance (replacement reserves); utility allowance per NBHA's schedule of utility allowances; principal and interest on mortgage debt incurred to finance major repairs, replacements or improvements for the home including changes needed to make the home accessible; and homeowner association dues, fees or regular charges assessed, if any. Homeownership expenses for a cooperative member may only include NBHA approved amounts for the cooperative charge under the cooperative occupancy agreement including payment for real estate taxes and public assessments on the home; principal and interest on initial debt incurred to finance purchase of cooperative membership shares and any refinancing of such debt; home insurance; the allowances for maintenance expenses, major repairs and replacements and

utilities; and principal and interest on debt incurred to finance major repairs, replacements, or improvements, including changes needed to make the home accessible.

***C. Determining the Total Family Contribution***

The TFC is that portion of the homeownership expense that the family must pay. It is generally 30% percent of the family's adjusted income, plus any gap between the payment standard and the actual housing cost. All family income (including public assistance), will be counted to determine the family's adjusted monthly income for purposes of determining the amount of assistance.

***D. Payment to Family or Lender.***

NBHA will provide the lender with notice of the amount of the housing assistance payment prior to close of escrow and will pay NBHA's contribution towards the family's homeowner expense directly to the family, unless otherwise required by the lender. The family will be responsible to submit the entire mortgage payment to the lender unless the lender requires direct payment of NBHA's contribution.

**5. TERMINATION OF SECTION 8 HOMEOWNERSHIP ASSISTANCE.**

***A. Grounds for Termination of Homeownership Assistance***

- (1) Failure to Comply with Family Obligations Under Section 8 Program or NBHA's Homeownership Policies. A family's home ownership assistance may be terminated if the family fails to comply with its obligations under the Section 8 program, NBHA home ownership policies, or if the family defaults on the mortgage. If required, the family must attend and complete ongoing home ownership and housing counseling classes. The family must comply with the terms of any mortgage incurred to purchase and/or refinance the home. The family must provide NBHA with written notice of any sale or transfer of any interest in the home; any plan to move out of the home prior to the move; the family's household income and homeownership expenses on an annual basis; any notice of mortgage default received by the family; and any other notices which may be required pursuant to NBHA homeownership policies. Except as otherwise provided in this Section, the family may not convey or transfer the home to any entity or person other than a member of the assisted family while receiving homeownership assistance.
- (2) Occupancy of Home. Homeownership assistance will only be provided while the family resides in the home. If the family moves out of the home, NBHA will not continue homeownership assistance commencing with the month after the family moves out
- (3) Changes in Income Eligibility. A family's homeownership assistance may be changed in the month following annual recertification of the household income, but participation in the Section 8 Homeownership Program shall continue until such time as the assistance payment amounts to \$0 for a period of six (6) consecutive months.
- (5) Maximum Term of Homeownership Assistance. Notwithstanding the provisions of Section 5(A), subparagraphs 1 through 3, except for disabled and elderly families, a family may receive Section 8 homeownership assistance for not longer than ten (10) years from the date of close of escrow unless the initial mortgage incurred to finance

purchase of the home has a term that is 20 years or longer, in which case the maximum term is 15 years. Families that qualify as elderly at the commencement of homeownership assistance are not subject to a maximum term limitation. Families that qualify as disabled families at the commencement of homeownership assistance or at any time during the provision of homeownership assistance are not subject to a maximum term limitation. If a disabled family or elderly family ceases to qualify as disabled or elderly, the appropriate maximum term becomes applicable from the date homeownership assistance commenced; provided, however, that such family shall be eligible for at least six additional months of homeownership assistance after the maximum term becomes applicable. The time limit applies to any member of the household who has an ownership interest in the unit during any time that homeownership payments are made, or is a spouse of any member of the household who has an ownership interest.

***B. Procedure for Termination of Homeownership Assistance.***

A participant in the Section 8 Homeownership Program shall be entitled to the same termination notice and informal hearing procedures as set forth in the Administrative Plan of the NBHA for the Section 8 housing choice voucher program.

***C. Recapture of Homeownership Assistance***

In certain circumstances the homeownership assistance provided to the family is subject to total or partial recapture upon the sale or refinancing of the home. Sales proceeds that are used by the family to purchase a new home with Section 8 homeownership assistance are not subject to recapture. Further, a family may refinance to take advantage of better terms without any recapture penalty, provided that no proceeds are realized ("cash-out"). Only "cash-out" proceeds from refinancing and sales proceeds not used to purchase a new home with Section 8 assistance less those amounts provided for in §982.640 are subject to recapture. Further, the amount of homeownership assistance subject to recapture shall automatically be reduced in annual increments of 10% beginning one year from the purchase date. At the end of 10 years the amount of homeownership assistance subject to recapture will be zero.

**6. CONTINUED PARTICIPATION IN SECTION 8 HOUSING CHOICE VOUCHER PROGRAM.**

***A. Default on FHA-Insured Mortgage.***

If the family defaults on an FHA-insured mortgage, NBHA may permit the family to move with continued Section 8 housing choice rental assistance if the family demonstrates that it has (a) conveyed title to the home to HUD or its designee, as required by HUD; and (b) moved from the home within the period established or approved by HUD.

***B. Default on non-FHA-Insured Mortgage.***

If the family defaults on a mortgage that is not FHA-insured, NBHA may permit the family to move with continued Section 8 housing choice voucher rental assistance if the family demonstrates that it has (a) conveyed title to the home to the lender, to NBHA or

to its designee, as may be permitted or required by the lender; and (b) moved from the home within the period established or approved by the lender and/or NBHA.

**7. NBHA ADMINISTRATIVE FEE.**

For each month that homeownership assistance is paid by NBHA on behalf of the family, NBHA shall be paid the ongoing administrative fee described in 24 C.F.R. §982.152(b).

**8. WAIVER OR MODIFICATION OF HOMEOWNERSHIP POLICIES.**

The Executive Director of NBHA shall have the discretion to waive or modify any provision of the Section 8 Homeownership Program or policies not governed by statute or regulation for good cause or to comply with changes in HUD regulations or directives.

## **APPENDIX A: SECTION 8 HOMEOWNERSHIP OBLIGATIONS**

This form is to be signed by the home buyer(s) in the presence of the New Bedford Housing Authority's (NBHA) Homeownership Program Coordinator. The Coordinator will explain any and all clauses which you, the home buyer(s), may not understand. The following paragraphs describe your responsibilities under the Section 8 Homeownership Program. If you or members of your household do not meet these responsibilities, through your actions or your failure to act, you may be terminated from the Section 8 Homeownership Program.

1. **Family Obligations:** You must comply with all Family Obligations of the Section 8 Housing Choice Voucher Program, excepting only the prohibition against owning or having an interest in the unit. Family Obligations §§ 982.551(c),(d),(e),(f),(g) and (j) do not apply to the Section 8 Homeownership Program.
2. **Housing Counseling:** All participating family members (i.e. those signing the purchase offer and loan documents) must satisfactorily complete a NBHA provided or approved counseling program prior to commencement of homeownership assistance. NBHA may require any or all participating family members to attend additional housing counseling classes as a condition of continued assistance.
3. **Purchase Contract:** You must include contract conditions in any Offer to Purchase that give NBHA a reasonable time (a) to inspect the home for compliance with HUD's Housing Quality Standards; (b) to review and approve a professional home inspection report obtained by you from a NBHA approved inspector; and (c) approve the terms of your proposed financing. Advise your Realtor of these requirements.
4. **Mortgage Obligations:** You must comply with the terms of any mortgage incurred in the purchase of the property and must notify NBHA's Homeownership Program Counselor within five (5) days of receipt of any late payment or default notice.
5. **Occupancy:** You must occupy the unit as your principal residence. You may not transfer, sell, or assign any interest in the property without NBHA's prior written consent. You may not rent or lease any part of the premises without NBHA's prior written consent. You must notify NBHA in writing at least 30 days prior to moving out of the house for a period of 30 days or longer or prior to any sale, transfer, assignment, lease or other form of alienation of the assisted property.
6. **Maintenance:** You must maintain the property in a decent, safe and sanitary manner. You must allow NBHA to inspect the property within one-week of a demand by NBHA to conduct an inspection. You must correct any notice of deficiency issued by NBHA within the time limit specified in the notice. If you fail to adequately maintain the property, NBHA may divert the maintenance and replacement reserves portions of the Homeownership Assistance Payment to an escrow account to be used to pay for reasonable and necessary maintenance expenses
7. **Annual Re-examination:** You must annually provide NBHA with current information regarding family income and composition in a format required by NBHA.
8. **Refinancing:** You must notify NBHA in writing of any proposal to refinance the original purchase mortgage or of any proposal to encumber the property with secondary financing and obtain NBHA's written approval of such financing prior to executing any loan documents.

9. **Default:** In the event of a default on your mortgage obligation, you must cooperate with NBHA and the lender to minimize any loss to the lender in order to maintain your eligibility to continue as a participant in the Section 8 Housing Choice Voucher Program.
10. **Recapture:** You must sign and have recorded a lien, in a form required by HUD, securing NBHA's right to recapture a percentage of homeownership assistance provided to you upon your sale or refinancing of the home within a 10 year period after the purchase date. The amount of recapture shall be calculated and shall be subject to automatic reduction in 10% increments annually beginning one year from the purchase date.

By signing below, I attest that I have read and understood my obligations as a participant in the Section 8 Homeownership Program and I agree to abide by these responsibilities. I understand that NBHA may terminate my homeownership assistance if I violate any of these obligations, but that I may request an informal review of any proposed notice of termination prior to it becoming effective.

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Name

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Signature

---

Date

---

Name

---

Signature

---

Date

# **ATTACHMENT M**

**MA007m02**

# **VOLUNTARY CONVERSION INITIAL ASSESSMENTS**

## COMPONENT 10(B)

### VOLUNTARY CONVERSION INITIAL ASSESSMENTS

The New Bedford Housing Authority has concluded that conversion of any of its developments would be inappropriate because removal of any development would not meet the necessary conditions for voluntary conversion described in section 972.200(c). We have considered each covered development and determined, based on cost, ability to occupy the development, and cost and/or workability of vouchers in the community that voluntary conversion is inappropriate.

Below is completed “**Component 10(B) Voluntary Conversion Initial Assessments:**

a. *How many of the PHA’s developments are subject to the Required Initial Assessments?*

***Answer: Ten***

b. *How many of the PHA’s developments are not subject to the Required Initial Assessments based on exemptions (e.g., elderly and/or disabled developments not general occupancy projects)?*

***Answer: Two***

c. *How many Assessments were conducted for the PHA’s covered developments?*

***Answer: Ten***

d. *Identify PHA developments that may be appropriate for conversion based on the Required Initial Assessments:*

***Answer: None***

e. *If the PHA has not completed the Required Initial Assessments, describe the status of these assessments:*

***Answer: Not applicable***

Annual Statement / Performance and Evaluation Report		U. S. Department of Housing and Urban Development Office of Public and Indian Housing			OMB Approval No 2577-0157(exp 7/31/98)	
Comprehensive Grant Program (CGP) Part I: Summary						
PHA Name					Comprehensive Grant Number	FFY of Grant Approval
	New Bedford Housing Authority				MA06-P00750100	FY2000
• Original Annual Statement • Reserve for Disasters/Emergencies • Revised Annual Statement/Revision Number _____ • Performance and Evaluation Report for Program Year Ending 6/30/02						
• Final Performance and Evaluation Report						
		Total Estimated Cost		Total Actual Cost(2)		
Line No.	Summary by Development Account	Original	Revised (1)	Obligated	Expended	
1	Total Non-CGP Funds					
2	1406 Operations (May not exceed 10% of line 19)	\$ 326,000.00	\$ 306,000.00	\$ 288,002.37	\$ 288,002.37	
3	1408 Management Improvements	\$93,000	\$ 148,000.00	\$ 108,475.44	\$ 107,992.78	
4	1410 Administration	\$360,000	\$360,000	\$ 306,773.99	\$ 306,773.99	
5	1411 Audit					
6	1415 Liquidated Damages					
7	1430 Fees and Costs	\$161,275	\$ 273,969.00	\$ 256,622.70	\$ 174,321.31	
8	1440 Site Acquisition					
9	1450 Site Improvement	\$50,000	\$ 61,000.00	\$ 10,360.00	\$ 51,359.01	
10	1460 Dwelling Structures	\$2,998,193	\$ 3,126,269.00	\$ 3,104,930.08	\$ 2,461,689.69	
11	1465.1 Dwelling Equipment - Nonexpendable	\$55,000	\$55,000	\$ 45,141.00	\$ 45,141.00	
12	1470 Nondwelling Structures	\$0				
13	1475 Nondwelling Equipment	\$0				
14	1485 Demolition	\$0				
15	1490 Replacement Reserve	\$0				
16	1495.1 Relocation Costs	\$100,000	\$100,000	\$ 2,000.00	\$ 2,000.00	
17	1498 Mod Used for Development	\$0				
18	1502 Contingency (may not exceed 8% of line 19)	\$286,770	\$ -			
19	Amount of Annual Grant (Sum of lines 2-18)	\$4,430,238	\$ 4,430,238.00	\$ 4,122,305.58	\$ 3,437,280.15	
20	Amount of line 19 Related to LBP Activities	\$850,000				
21	Amount of line 19 Related to Section 504 Compliance	\$0				
22	Amount of line 19 Related to Security	\$985,000				
23	Amount of line 19 Related to Energy Conservation Measures	\$2,277,314				
Signature of Executive Director and Date			Signature of Public Housing Director/Office of Native American Programs Administrator and Date			

1 To be completed for the Performance and Evaluation Report or a Revised Annual Statement.

2 To be completed for the Performance and Evaluation Report

Annual Statement / Performance and Evaluation Report Comprehensive Grant Program (CGP 2000) Part II: Supporting Pages				U. S. Department of Housing Urban Development				Office of Public and Indian Housing				and		OMB Approval No 2577-0157(exp 7/31/98)			
Development Number/Name HA-Wide Activities		General Description of Major Work Categories		Development Account Number		Quantity		Total Estimated Cost				Total Actual Cost				Status of Proposed Work	
								Original		Revised(1)		Funds Obligated (2)		Funds Expended			
1. MA7-1 Bay Village		Interior renovations to abate lead		1460		100		\$ 1,047,500.00		\$ 544,755.71		\$ 508,800.00		\$ 506,600.44		Funds shifted through fungibility	
2. MA7-2 Presidential Heights		Interior renovations to abate lead		1460		100		\$ 600,000.00		\$ 272,629.00		\$ 187,415.00		\$ 187,415.00		Funds shifted through fungibility	
3. MA7-3 Brickenwood		reroofing as needed		1460		100		\$ 100,000.00		\$ 322,435.00		\$ 322,435.00		\$ 216,043.49		Funds shifted through fungibility	
4. MA7-4 Westlawn		Heating system decentralization		1460		30		\$ 28,539.00		\$ 4,320.00		\$ 4,320.00		\$ 4,320.00		Funds partially spent in pervious grant	
		reroofing as needed		1460		30		\$ 50,000.00		\$ 204,515.00		\$ 204,515.00		\$ 204,515.00		Funds shifted through fungibility	
		Interior		1460				\$ 181,261.91		\$ 181,261.91		\$ 181,261.91		\$ 136,774.73		Funds shifted through fungibility	
		relocation		1495.1				\$ 100,000.00		\$ 100,000.00		\$ 2,000.00		\$ 2,000.00		Unchanged	
		subtotal						\$ 278,539.00		\$ 812,531.91		\$ 714,531.91		\$ 563,653.22			
5. MA7-6		Reconditioning		1460				\$ 4,330.00		\$ 4,330.00		\$ 4,330.00		\$ 4,330.00		Funds shifted through fungibility	
6. MA7-7 Hillside Court		Exterior siding repair/replacement and window repair/replacement		1460		48		\$ 106,654.00		\$ -							
7. MA7-8 Harwich Manor		Upgrade piping for washing machines		1460		30		\$ 10,000.00		\$ 10,000.00						Unchanged	
8. MA7-10 Shawmut Village		exterior modernization: replace windows, repair, replace siding		1460		50		\$ 500,000.00		\$ 1,026,899.00		\$ 1,022,050.00		\$ 1,022,050.00		Funds shifted through fungibility	
9. MA7-10 Satellite Village		exterior modernization: replace windows, repair, replace siding		1460		50		\$ 350,000.00		\$ 236,887.35		\$ 11,800.00		\$ 11,800.00		Funds shifted through fungibility	
10. MA7-11 Adams St		Exterior Renovation and Deleading		1460				\$ 125,000.00		\$ 125,000.00		\$ 12,275.00		\$ 12,275.00		Unchanged	
Signature of Executive Director and Date								Signature of Public Housing Director/Office of Native American Programs Administrator and Date									

1 To be completed for the Performance and Evaluation Report or a Revised Annual Statement.

2 To be completed for the Performance and Evaluation Report

Annual Statement / Performance and Evaluation Report Comprehensive Grant Program (CGP 2000) Part II: Supporting Pages				U. S. Department of Housing Urban Development				Office of Public and Indian Housing				and		OMB Approval No 2577-0157(exp 7/31/98)	
Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost				Status of Proposed Work					
				Original	Revised(1)	Funds	Obligated (2)	Funds	Expended						
11. PHA wide	a) eliminate various site hazards (potholes, broken fencing, deteriorated sidewalks and stairs, etc.) as they are identified	1450		\$ 25,000.00	\$ 4,445.99										Funds shifted through fungibility
	b) Emergency heating repairs	1450		\$ 25,000.00	\$ 45,554.01	\$ 45,554.01		\$ 45,554.01							Funds shifted through fungibility
	c) eliminate utilities emergencies as they occ	1460		\$ 15,500.00	\$ 20,866.03	\$ 20,866.03		\$ 20,866.03							Funds shifted through fungibility
	d) replace stoves at various sites	1465.1	240	\$ 55,000.00	\$ 55,000.00	\$ 45,141.00		\$ 45,141.00							Unchanged
	e) emergency roof repairs	1460	18	\$ 25,000.00	\$ 136,700.00	\$ 136,700.00		\$ 136,700.00							Funds shifted through fungibility
	f) Vacancy reduction: independent contractors renovating units at turnover	1460	20	\$ 40,000.00	\$ 35,670.00										Funds shifted through fungibility
	g) Site Improvements	1450			\$ 11,000.00	\$ 10,360.00		\$ 5,805.00							Funds shifted through fungibility
	subtotal			\$ 185,500.00	\$ 309,236.03	\$ 258,621.04		\$ 252,066.04							
12. PHA wide Management	a) Tenant pre-screening to reduce unit turnover	1408		\$ 53,000.00	\$ 53,000.00	\$ 15,860.32		\$ 15,860.32							Unchanged
	b) Security initiatives	1408		\$ 40,000.00	\$ 95,000.00	\$ 92,615.12		\$ 92,132.46							Funds shifted through fungibility
	subtotal			\$ 93,000.00	\$ 148,000.00	\$ 108,475.44		\$ 107,992.78							
13. PHA wide	a) Modernization Office salaries & benefits	1410		\$ 305,000.00	\$ 53,226.01										Funds shifted through fungibility
Administration	b) administration costs	1410		\$ 55,000.00	\$ 306,773.99	\$ 306,773.99		\$ 306,773.99							Funds shifted through fungibility
	subtotal			\$ 360,000.00	\$ 360,000.00	\$ 306,773.99		\$ 306,773.99							
14. Fees & Costs	a) begin design for interior renovations MA7-1	1430		\$ 55,000.00	\$ 45,000.00	\$ 42,166.56		\$ 33,067.63							Funds spent in previous grant
	b) Architectural services at various sites	1430		\$ 25,000.00	\$ 36,034.26	\$ 36,034.26		\$ 36,034.26							Funds shifted through fungibility
	c) continue design for interior renovations MA7-2	1430		\$ 50,000.00	\$ 70,000.00	\$ 69,584.00		\$ 3,715.50							Funds shifted through fungibility
	d) Exterior design for Hillside Ct & Adams St	1430		\$ 31,275.00	\$ 16,934.74	\$ 2,960.00		\$ 2,960.00							Funds shifted through fungibility
	e) Water Design	1430			\$ 54,600.00	\$ 54,600.00		\$ 47,735.39							Funds shifted through fungibility
	f) A/E Interior Design 7-4	1430			\$ 775.00	\$ 775.00		\$ 775.00							Funds shifted through fungibility
	g) A/E Design MA7-6 Boa Vista	1430			\$ 21,104.10	\$ 21,104.10		\$ 20,634.75							Funds shifted through fungibility
	h) Fees and Costs	1430			\$ 29,520.90	\$ 29,398.78		\$ 29,398.78							Funds shifted through fungibility
	subtotal			\$ 161,275.00	\$ 273,969.00	\$ 256,622.70		\$ 174,321.31							
Signature of Executive Director and Date				Signature of Public Housing Director/Office of Native American Programs Administrator and Date											

1 To be completed for the Performance and Evaluation Report or a Revised Annual Statement.

2 To be completed for the Performance and Evaluation Report

Annual Statement / Performance and Evaluation Report Comprehensive Grant Program (CGP) Part III: Implementation Schedule				U. S. Department of Housing and Urban Development Office of Public and Indian Housing			val No 2577-0157(exp 7/31/98)	
Development Number/Name	All Funds Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)			Reasons for Revised Target Dates (2)	
HA-Wide Activities	Original	Revised (2)	Actual (2)	Original	Revised (2)	Actual (2)		
1. MA7-1 Bay Village	31-Mar-02	30-Sep-02		30-Sep-03				
2. MA7-2 Presidential Hgts	31-Mar-02	30-Sep-02		30-Sep-03				
3. MA7-3 Brickenwood	31-Mar-02	30-Sep-02		30-Sep-03				
4. MA7-4 Westlawn	31-Mar-02	30-Sep-02		30-Sep-03				
5. MA7-7 Hillside Ct	31-Mar-02	30-Sep-02		30-Sep-03				
6. MA7-8 Harwich Manor	31-Mar-02	30-Sep-02		30-Sep-03				
7. MA7-10 Shawmut Village	31-Mar-02	30-Sep-02		30-Sep-03				
8. MA7-10 Satellite Village	31-Mar-02	30-Sep-02		30-Sep-03				
9. MA7-11 Adams St	31-Mar-02	30-Sep-02		30-Sep-03				
10. PHA wide								
a)	31-Mar-02	30-Sep-02		30-Sep-03				
b)	31-Mar-02	30-Sep-02		30-Sep-03				
c)	31-Mar-02	30-Sep-02		30-Sep-03				
d)	31-Mar-02	30-Sep-02		30-Sep-03				
e)	31-Mar-02	30-Sep-02		30-Sep-03				
f)	31-Mar-02	30-Sep-02		30-Sep-03				
11. PHA wide Management								
a)	31-Mar-02	30-Sep-02		30-Sep-03				
b)	31-Mar-02	30-Sep-02		30-Sep-03				
Signature of Executive Director and Date				Signature of Public Housing Director/Office of Native American Programs and Date				

1 To be completed for the Performance and Evaluation Report or a Revised Annual Statement.

2 To be completed for the Performance and Evaluation Report

Annual Statement / Performance and Evaluation Report				U. S. Department of Housing and Urban Development Office of Public and Indian Housing			val No 2577-0157(exp 7/31/98)
Comprehensive Grant Program (CGP) Part III: Implementation Schedule							
Development	All Funds Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)			
Number/Name							Reasons for Revised Target Dates (2)
HA-Wide	Original	Revised (2)	Actual (2)	Original	Revised (2)	Actual (2)	
Activities							
12. PHA wide							
Administration							
a)	31-Mar-02	30-Sep-02		30-Sep-03			
b)	31-Mar-02	30-Sep-02		30-Sep-03			
c)	31-Mar-02	30-Sep-02		30-Sep-03			
13. Fees & Costs							
a)	31-Mar-02	30-Sep-02		30-Sep-03			
b)	31-Mar-02	30-Sep-02		30-Sep-03			
c)	31-Mar-02	30-Sep-02		30-Sep-03			
d)	31-Mar-02	30-Sep-02		30-Sep-03			
e)		30-Sep-02			30-Sep-03		added by fungibility
f)		30-Sep-02			30-Sep-03		added by fungibility
g)		30-Sep-02			30-Sep-03		added by fungibility
h)		30-Sep-02			30-Sep-02		added by fungibility

Annual Statement / Performance and Evaluation Report		U. S. Department of Housing and Urban Development Office of Public and Indian Housing		
Comprehensive Grant Program (CGP) <b>Part I: Summary</b>				
PHA Name				Comprehensive Grant Number
	New Bedford Housing Authority			MA06-P00750101
• Original Annual Statement • Reserve for Disasters/Emergencies • Revised Annual Statement/Revision Number _____ • Performance and Evaluation Report • Final Performance and Evaluation Report				
		Total Estimated Cost		
Line No.	Summary by Development Account	Original	Revised (1)	Obligated
1	Total Non-CGP Funds			
2	1406 Operations (May not exceed 10% of line 19)	\$ 326,000.00	\$ 326,000.00	
3	1408 Management Improvements	\$ 93,000.00	\$ 73,581.35	\$ 25,684.57
4	1410 Administration	\$ 395,000.00	\$ 395,000.00	
5	1411 Audit			
6	1415 Liquidated Damages			
7	1430 Fees and Costs	\$ 210,000.00	\$ 204,691.97	\$ 58,500.77
8	1440 Site Acquisition			
9	1450 Site Improvement	\$ 285,000.00	\$ 305,554.01	
10	1460 Dwelling Structures	\$ 2,779,543.00	\$ 2,921,520.28	\$ 464,661.69
11	1465.1 Dwelling Equipment - Nonexpendable	\$ 55,000.00	\$ 55,000.00	\$ 5,280.00
12	1470 Nondwelling Structures	\$ -		
13	1475 Nondwelling Equipment	\$ -		
14	1485 Demolition	\$ -		
15	1490 Replacement Reserve	\$ -		
16	1495.1 Relocation Costs	\$ 25,000.00	\$ 25,000.00	
17	1498 Mod Used for Development			
18	1502 Contingency (may not exceed 8% of line 19)	\$ 362,482.00	\$ 224,677.39	
19	Amount of Annual Grant (Sum of lines 2-18)	\$ 4,531,025.00	\$ 4,531,025	\$ 554,127.03
20	Amount of line 19 Related to LBP Activities			
21	Amount of line 19 Related to Section 504 Compliance			
22	Amount of line 19 Related to Security			
23	Amount of line 19 Related to Energy Conservation Measures			
Signature of Executive Director and Date		Signature of Public Housing Director/Office of Native American Pro		



Annual Statement / Performance and Evaluation Report Comprehensive Grant Program (CGP 2001) Part II: Supporting Pages				U. S. Department of Housing and Urban Development Office of Public and Indian Housing				OMB Approval No 2577-0157(exp 7/31/98)	
Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Proposed Work	
				Original	Revised(1)	Funds Obligated (2)	Funds Expended		
1. MA7-1 Bay	Interior renovations to abate lead	1460	100	\$488,338	\$568,123	\$ -	\$ -	Funds shifted through fungibility	
Village	Replace repair heating system	1460	100	\$250,000	\$250,000	\$ 152,811.69	\$ 152,811.69	unchanged	
	relocation	1495.1		\$25,000	\$25,000	\$ -	\$ -	unchanged	
	Repair/paint walls and ceilings in units	1460	64	\$12,800	\$12,800	\$ -	\$ -	unchanged	
	Replace toilets and associated repairs	1460	15	\$60,000	\$60,000	\$ -	\$ -	unchanged	
	subtotal			\$836,138	\$915,923	\$152,811.69	\$152,811.69		
2. MA7-2	Interior renovations to abate lead	1460	100	\$850,505	\$538,655	\$ -	\$ -	Funds shifted through fungibility	
Pres Hgts	repair replace heating system	1460		\$250,000	\$250,000	\$ -	\$ -	unchanged	
	repair/replace clothes lines and comr	1450		\$10,000	\$10,000	\$ -	\$ -	unchanged	
	Repair/paint walls and ceilings in units	1460	47	\$9,400	\$9,400	\$ -	\$ -	unchanged	
	subtotal			\$1,119,905	\$808,055	\$0	\$0		
3. MA7-3	Water line replacement	1450	150	\$200,000	\$200,000	\$ -	\$ -	unchanged	
Brickenwood	Asbestos	1460	150		\$ 311,850.00	\$ 311,850.00	\$ 151,236.36	Funds shifted through fungibility	
4. MA7-6 Boa Vista	Replace leaking roof	1460	100	\$85,000	\$85,000	\$ -	\$ -	unchanged	
5. MA7-7	Install automatic door opener, main e	1460	49	\$20,000	\$20,000	\$ -	\$ -	unchanged	
Hillside Ct	Reconfigure community bathrooms t	1460	49	\$20,000	\$20,000	\$ -	\$ -	unchanged	
6. MA7-8	alleviate site flooding	1450		\$50,000	\$50,000	\$ -	\$ -	unchanged	
Harwich Manor	window repair/replacement	1460		\$50,000	\$50,000	\$ -	\$ -	unchanged	
7. MA7-8 Mosher St.	Repair/replace all rear decks	1460	4	\$28,000	\$28,000	\$ -	\$ -	unchanged	
8. MA7-10 Shawmut Village	finish exterior modernization	1460	30	\$125,000	\$125,000	\$ -	\$ -	unchanged	
9.MA7-10 Satellite Village	finish exterior modernization	1460	30	\$125,000	\$238,113	\$ -	\$ -	Funds shifted through fungibility	
10. MA7-10 Chaffee/ Fairfield	window repair/replacement	1460		\$50,000	\$50,000	\$ -	\$ -	unchanged	
11. MA7-11	Exterior Renovation and Deleading	1460		\$250,000	\$250,000	\$ -	\$ -	unchanged	
Adams St									
Signature of Executive Director and Date				Signature of Public Housing Director/Office of Native American Programs Administrator and Date					

1 To be completed for the Performance and Evaluation Report or a Revised Annual Statement.

2 To be completed for the Performance and Evaluation Report

Annual Statement / Performance and Evaluation Report				U. S. Department of Housing and Urban Development Office of Public and Indian Housing				OMB Approval No 2577-0157(exp 7/31/98)
Comprehensive Grant Program (CGP 2001) Part II: Supporting Pages								
Development Number/Name	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Proposed Work
HA-Wide				Original	Revised(1)	Funds Obligated (2)	Funds Expended	
Activities								
12. PHA wide	a) eliminate various site hazards (potholes, broken fencing, deteriorated sidewalks and stairs, etc.) as they are identified	1450		\$25,000	\$45,554	\$ -	\$ -	Funds shifted through fungibility
	b) Emergency heating repairs	1460		\$25,000	\$4,446	\$ -	\$ -	
	c) eliminate utilities emergencies as t	1460		\$15,500	\$10,134	\$ -	\$ -	
	d) replace stoves at various sites	1465.1	240	\$55,000	\$ 55,000.00	\$ 5,280.00	\$ 5,280.00	unchanged
	e) emergency roof repairs	1460	18	\$25,000		\$ -	\$ -	Funds spent in previous grant
	f) Vacancy reduction: independent contractors renovating units at turnover	1460	20	\$40,000	\$40,000	\$ -	\$ -	unchanged
	subtotal			\$185,500	\$155,134	\$5,280	\$5,280	unchanged
13. PHA wide Management	a) Tenant pre-screening to reduce unit turnover	1408		\$53,000	\$53,000	\$ -	\$ -	unchanged
	b) Security initiatives	1408		\$40,000	\$20,581.35	\$ 20,581.35	\$ 20,581.35	Funds shifted through fungibility
	subtotal			\$93,000	\$73,581	\$25,685	\$25,685	unchanged
14. PHA wide	a) Modernization Office salaries & b	1410		\$340,000	\$340,000	\$ -	\$ -	unchanged
Administration	b) administration costs	1410		\$55,000	\$55,000	\$ -	\$ -	unchanged
	subtotal			\$ 395,000	\$ 395,000	\$ -	\$ -	unchanged
15. Fees & Costs	a) continue design interior renovations MA7-1	1430		\$55,000	\$ 55,000.00	\$ 5,178.80	\$ 5,178.80	unchanged
	b) Architectural services at various sites	1430		\$25,000	\$ 32,776.50	\$ 32,766.50	\$ 32,766.50	Funds shifted through fungibility
	c) continue design interior renovations MA7-2	1430		\$55,000	\$25,000	\$ -	\$ -	Funds shifted through fungibility
	d) Engineering studies Pres Hgts MA	1430		\$5,000	\$5,000	\$ -	\$ -	unchanged
	e) Engineering water line MA7-3	1430		\$50,000	\$50,000	\$ -	\$ -	unchanged
	f) Interior design, space study at Boa Vista and Bay Village	1430		\$5,000	\$5,000	\$ 2,515.00	\$ 2,515.00	unchanged
	g) Engineering desing for replacement roofing Boa Vista MA7-6	1430		\$ 15,000	\$ 15,000	\$ 1,125.00	\$ 1,125.00	unchanged
	h) General Fees and Costs	1430			\$ 16,915.47	\$ 16,915.47	\$ 16,915.47	Funds shifted through fungibility
	subtotal			\$ 210,000	\$ 187,777	\$ 41,585	\$ 41,585	
Signature of Executive Director and Date				Signature of Public Housing Director/Office of Native American Programs Administrator and Date				

1 To be completed for the Performance and Evaluation Report or a Revised Annual Statement.

2 To be completed for the Performance and Evaluation Report

Annual Statement / Performance and Evaluation Report				U. S. Department of Housing and Urban Development Office of Public and Indian Housing			val No 2577-0157(exp 7/31/98)	
Comprehensive Grant Program (CGP) Part III: Implementation Schedule								
Development	All Funds Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)				
Number/Name							Reasons for Revised Target Dates (2)	
HA-Wide	Original	Revised (2)	Actual (2)	Original	Revised (2)	Actual (2)		
Activities								
1. MA7-1	30-Sep-02	30-Jun-03		31-Mar-03	6/30/2005			
Bay Village								
2. MA7-2	30-Sep-02	30-Jun-03		31-Mar-03	6/30/2005			
Presidential Hgts								
3. MA7-3	30-Sep-02	30-Jun-03		31-Mar-03	6/30/2005			
Brickenwood								
4. MA7-6	30-Sep-02	30-Jun-03		31-Mar-03	6/30/2005			
Boa Vista								
5. MA7-7	30-Sep-02	30-Jun-03		31-Mar-03	6/30/2005			
Hillside Ct								
6. MA7-8	30-Sep-02	30-Jun-03		31-Mar-03	6/30/2005			
Harwich Manor								
7. MA7-8	30-Sep-02	30-Jun-03		31-Mar-03	6/30/2005			
Mosher St								
8. MA7-10	30-Sep-02	30-Jun-03		31-Mar-03	6/30/2005			
Shawmut Village								
9. MA7-10	30-Sep-02	30-Jun-03		31-Mar-03	6/30/2005			
Satellite Village								
10. MA7-10	30-Sep-02	30-Jun-03		31-Mar-03	6/30/2005			
Chaffee								
11. MA7-11	30-Sep-02	30-Jun-03		31-Mar-03	6/30/2005			
Adams St								
12. PHA wide								
a)	30-Sep-02	30-Jun-03		31-Mar-03	6/30/2005			
b)	30-Sep-02	30-Jun-03		31-Mar-03	6/30/2005			
c)	30-Sep-02	30-Jun-03		31-Mar-03	6/30/2005			
d)	30-Sep-02	30-Jun-03		31-Mar-03	6/30/2005			
e)	30-Sep-02	30-Jun-03		31-Mar-03	6/30/2005			
f)	30-Sep-02	30-Jun-03		31-Mar-03	6/30/2005			
Signature of Executive Director and Date					Signature of Public Housing Director/Office of Native American Programs and Date			

1 To be completed for the Performance and Evaluation Report or a Revised Annual Statement.

2 To be completed for the Performance and Evaluation Report

Annual Statement / Performance and Evaluation Report				U. S. Department of Housing and Urban Development			val No 2577-0157(exp 7/31/98)	
Comprehensive Grant Program (CGP) Part III: Implementation Schedule				Office of Public and Indian Housing				
Development	All Funds Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)				
Number/Name							Reasons for Revised Target Dates (2)	
HA-Wide	Original	Revised (2)	Actual (2)	Original	Revised (2)	Actual (2)		
Activities								
13. PHA wide Management								
a)	30-Sep-02	30-Jun-03		31-Mar-03	6/30/2005			
b)	30-Sep-02	30-Jun-03		31-Mar-03	6/30/2005			
14. PHA wide Administration								
a)	30-Sep-02	30-Jun-03		31-Mar-03	6/30/2005			
b)	30-Sep-02	30-Jun-03		31-Mar-03	6/30/2005			
15. Fees & Costs								
a)	30-Sep-02	30-Jun-03		31-Mar-03	6/30/2005			
b)	30-Sep-02	30-Jun-03		31-Mar-03	6/30/2005			
c)	30-Sep-02	30-Jun-03		31-Mar-03	6/30/2005			
d)	30-Sep-02	30-Jun-03		31-Mar-03	6/30/2005			
e)	30-Sep-02	30-Jun-03		31-Mar-03	6/30/2005			
f)	30-Sep-02	30-Jun-03		31-Mar-03	6/30/2005			
g)	30-Sep-02	30-Jun-03		31-Mar-03	6/30/2005			
h)		30-Jun-03			6/30/2005			