

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 2005 - 2009  
Annual Plan for Fiscal Year 2005**

**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)** 01/2005

### 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 2005 - 2009**  
[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*
  - 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: *for 6 units privatized at Caroline Street and 3 units lost at Hillside Court due to enlarging efficiencies.*
- 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
- 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 2005**  
[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. 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**

	<u>Page #</u>
<b>Annual Plan</b>	
i. Executive Summary	1
ii. Table of Contents	3
1. Housing Needs	6
2. Financial Resources	12
3. Policies on Eligibility, Selection and Admissions	14
4. Rent Determination Policies	21
5. Operations and Management Policies	25
6. Grievance Procedures	26
7. Capital Improvement Needs	27
8. Demolition and Disposition	29
9. Designation of Housing	30
10. Conversions of Public Housing	31
11. Homeownership	32
12. Community Service Programs	34
13. Crime and Safety	36
14. Pets	38
15. Civil Rights Certifications (included with PHA Plan Certifications)	38
16. Audit	38
17. Asset Management	38
18. Other Information	39

#### **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:

- (B) Admissions Policy for Deconcentration (**MA007b02**)
- (C) FY2005 Capital Fund Program Annual Statement, Performance Evaluation Report (**MA007c02**)
- Most recent board-approved operating budget (Required Attachment for PHAs that are troubled or at risk of being designated troubled ONLY)

- (D) Comments of Resident Advisory Board or Boards (must be attached if not included in PHA Plan text) (MA007d02)
- (E) Community Service Policy (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)
- (L) Voluntary Conversion Initial Assessments (MA007l02)

Optional Attachments:

PHA Management Organizational Chart

- (A) Statement of Financial Resources (MA007a02)
- (F) Designate Boa Vista Elderly Only (MA007f02)
- (K) Designate Caroline Street Elderly Only (MA007k02)

**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
	Policies governing any Section 8 Homeownership program <input 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
N/A	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)	
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	495	78.08%	
Very low income (>30% but <=50% AMI)	111	17.50%	
Low income (>50% but <80% AMI)	28	4.42%	
Families with children	350	55.20%	
Elderly families	46	7.26%	
Families with Disabilities	238	37.54%	
Race/ethnicity White	255	40.22%	
Race/ethnicity Black	92	14.51%	
Race/ethnicity AmInd	9	1.42%	
Race/ethnicity Hisp	274	43.22%	
Race/ethnicity Asian	4	0.63%	
Characteristics by Bedroom Size (Public Housing Only)			
1BR	286	45.11%	
2 BR	222	35.02%	
3 BR	101	15.93%	
4 BR	16	2.52%	
5 BR	9	1.42%	
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	1337	100.00%	
Extremely low income <=30% AMI	1085	81.15%	
Very low income (>30% but <=50% AMI)	218	16.31%	
Low income (>50% but <80% AMI)	34	2.54%	
Families with children	736	55.05%	
Elderly families	121	9.05%	
Families with Disabilities	480	35.90%	
Race/ethnicity White	748	55.95%	
Race/ethnicity Black	213	15.93%	
Race/ethnicity AmInd	9	.67%	
Race/ethnicity Hisp	349	26.10%	
Race/ethnicity Asian	18	1.35%	
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 130 families in Fiscal Year 2005.*

**(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 2005 grants)</b>		
a) Public Housing Operating Fund	3,303,515	
b) Public Housing Capital Fund	3,707,107	PHA Capital Improvements
c) HOPE VI Revitalization		
d) HOPE VI Demolition		
e) Annual Contributions for Section 8 Tenant-Based Assistance	10,069,554	
f) Public Housing Drug Elimination Program (including any Technical Assistance funds)		
g) Resident Opportunity and Self-Sufficiency Grants		
h) Community Development Block Grant		
i) HOME		
Other Federal Grants (list below)		
FEDERAL HOME LOAN BANK	150,000	PHA Capital Improvements

<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>	5,897,984	Public Housing Operations
<b>4. Other income (list below)</b>		
Non-dwelling rent	5,870	Public Housing Operations
Admin Fees - Section 8	1,305,348	Program Administration
Investment Income	100,000	Public Housing Operations
Sales and Services to Tenants	69,700	Public Housing Operations
<b>5. Non-federal sources (list below)</b>		
FIRSTFED BANK – TERM LOAN	150,000	PHA Capital Improvements
BONDS	2,000,000	PHA Capital Improvements
<b>Total resources</b>	<b>26,759,078</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 and if applicant is disabled.*

- 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 C (*MA007c02*)

-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
- 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> : <i>(03/10/02)</i>
5. Number of units affected: 45
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: *October 1, 2004*  
 b. Projected end date of activity: *October 1, 2006*

**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: 100
7. Coverage of action (select one)
<input type="checkbox"/> Part of the development
<input checked="" type="checkbox"/> 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) <input type="checkbox"/> Units addressed in a pending or approved demolition application (date submitted or approved: <input type="checkbox"/> Units addressed in a pending or approved HOPE VI demolition application (date submitted or approved: ) <input type="checkbox"/> Units addressed in a pending or approved HOPE VI Revitalization Plan (date submitted or approved: ) <input type="checkbox"/> Requirements no longer applicable: vacancy rates are less than 10 percent <input type="checkbox"/> Requirements no longer applicable: site now has less than 300 units <input type="checkbox"/> Other: (describe below)

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

(See Attachment L Filename: *MA007102*)

**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 (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 (l)]

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 has 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?

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. )

<b>Services and Programs</b>				
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)

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

a. Participation Description

Family Self Sufficiency (FSS) Participation		
Program	Required Number of Participants (start of FY 2005 Estimate)	Actual Number of Participants (As of: 12/09/00)

- 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**

(See Attachment E Filename: *MA007e02*)

**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 2005 PHDEP funds must provide a PHDEP Plan meeting specified requirements prior to receipt of PHDEP funds.

**NOTE: THIS PROGRAM NO LONGER EXISTS**

- 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 2005 in this PHA Plan?
- Yes  No: This PHDEP Plan is an Attachment. (Attachment Filename:)

**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 D (File name: **MA007d02**)
  - 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)
<b>Total estimated cost over next 5 years</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		SEC 8 PROGRAM ADMINISTRATION
<b>AVAILABLE RESOURCES</b>							
<b>OPERATING RESOURCES</b>							
PERFORMANCE FUNDING SUBSIDY		3,303,515					
DWELLING RENTS		5,897,984					
INVESTMENT INCOME		100,000					
OTHER INCOME		75,570					
<b>CAPITAL RESOURCES</b>							
CAPITAL FUND PROGRAM			3,707,107				
BONDS			2,000,000				
FEDERAL HOME LOAN BANK- GRANT			150,000				
FIRSTFED BANK - TERM LOAN			150,000				
<b>SECTION 8 HOUSING ASSISTANCE</b>							
HOUSING ASSISTANCE					10,069,554		
ADMINISTRATION FEES							1,305,348
<b>TOTAL</b>		<b>9,377,069</b>	<b>6,007,107</b>		<b>10,069,554</b>		<b>1,305,348</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
<b>AVAILABLE RESOURCES</b>						
<b>OPERATING RESOURCES</b>						
PERFORMANCE FUNDING SUBSIDY		3,303,515				
DWELLING RENTS		6,015,943				
INVESTMENT INCOME		102,000				
OTHER INCOME		77,081				
<b>CAPITAL RESOURCES</b>						
CAPITAL FUND PROGRAM			4,787,143			
BONDS			4,000,000			
FEDERAL HOME LOAN BANK- GRANT			150,000			
FIRSTFED BANK - TERM LOAN			150,000			
<b>SECTION 8 HOUSING ASSISTANCE</b>						
HOUSING ASSISTANCE					10,069,554	
ADMINISTRATION FEES						1,305,348
<b>TOTAL</b>	<b>29,960,585</b>	<b>9,498,540</b>	<b>9,087,143</b>		<b>10,069,554</b>	<b>1,305,348</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	PROGRAM ADMINISTRATION
<b>AVAILABLE RESOURCES</b>						
<b>OPERATING RESOURCES</b>						
PERFORMANCE FUNDING SUBSIDY		3,303,515				
DWELLING RENTS		6,136,262				
INVESTMENT INCOME		104,040				
OTHER INCOME		78,623				
<b>CAPITAL RESOURCES</b>						
CAPITAL FUND PROGRAM			3,240,108			
BONDS			4,000,000			
FEDERAL HOME LOAN BANK- GRANT						
FIRSTFED BANK - TERM LOAN						
<b>SECTION 8 HOUSING ASSISTANCE</b>						
HOUSING ASSISTANCE					10,069,554	
ADMINISTRATION FEES						1,305,348
<b>TOTAL</b>	<b>28,237,450</b>	<b>9,622,440</b>	<b>7,240,108</b>		<b>10,069,554</b>	<b>1,305,348</b>

NEW BEDFORD HOUSING AUTHORITY						
5 -YEAR PLAN						
FOR FY BEGINNING JANUARY 1, 2008						
STATEMENT OF FINANCIAL RESOURCES						
				PLANNED USES		
		PUBLIC HOUSING OPERATIONS	PUBLIC HOUSING MODERNIZATION		SEC 8 PAYMENTS TO OWNERS	SEC 8 PROGRAM ADMINISTRATION
<b>AVAILABLE RESOURCES</b>						
<b>OPERATING RESOURCES</b>						
PERFORMANCE FUNDING SUBSIDY		3,303,515				
DWELLING RENTS		6,258,988				
INVESTMENT INCOME		106,121				
OTHER INCOME		80,195				
<b>CAPITAL RESOURCES</b>						
CAPITAL FUND PROGRAM			4,320,142			
BONDS			4,000,000			
FEDERAL HOME LOAN BANK- GRANT						
FIRSTFED BANK - TERM LOAN						
<b>SECTION 8 HOUSING ASSISTANCE</b>						
HOUSING ASSISTANCE					10,069,554	
ADMINISTRATION FEES						1,305,348
<b>TOTAL</b>	<b>29,443,863</b>	<b>9,748,819</b>	<b>8,320,142</b>		<b>10,069,554</b>	<b>1,305,348</b>

NEW BEDFORD HOUSING AUTHORITY						
5 -YEAR PLAN						
FOR FY BEGINNING JANUARY 1, 2009						
STATEMENT OF FINANCIAL RESOURCES						
				PLANNED USES		
		PUBLIC HOUSING OPERATIONS	PUBLIC HOUSING MODERNIZATION	SEC 8 PAYMENTS TO OWNERS	SEC 8 PROGRAM ADMINISTRATION	
<b>AVAILABLE RESOURCES</b>						
<b>OPERATING RESOURCES</b>						
PERFORMANCE FUNDING SUBSIDY		3,303,515				
DWELLING RENTS		6,384,167				
INVESTMENT INCOME		108,243				
OTHER INCOME		81,799				
<b>CAPITAL RESOURCES</b>						
CAPITAL FUND PROGRAM			4,320,142			
BONDS			2,000,000			
FEDERAL HOME LOAN BANK- GRANT						
FIRSTFED BANK - TERM LOAN						
<b>SECTION 8 HOUSING ASSISTANCE</b>						
HOUSING ASSISTANCE				10,069,554		
ADMINISTRATION FEES					1,305,348	
<b>TOTAL</b>	<b>27,572,769</b>	<b>9,877,725</b>	<b>6,320,142</b>	<b>10,069,554</b>	<b>1,305,348</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, 2005														
4	STATEMENT OF FINANCIAL RESOURCES														
5															
6															
7		<b>TOTAL</b>	<b>PRIOR</b>	<b>2005</b>	<b>2006</b>	<b>2007</b>	<b>2008</b>	<b>2009</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>CAPITAL RESOURCES</b>														
13															
14															
15															
16															
17															
18	<b>CAPITAL FUND PROGRAM</b>														
19															
20	MA06P00750101	4,531,025	4,531,025												4,531,025
21	MA06P00750102	4,324,377	2,401,062	961,658	961,658										4,324,377
22	MA06P00750103	3,430,038	823,525	1,303,257	1,303,257										3,430,038
23	MA06P00750203	724,314		362,157	362,157										724,314
24	MA06P00750104	4,320,142		1,080,036	1,080,036	1,080,036	1,080,034								4,320,142
25	MA06P00750105	4,320,142			1,080,036	1,080,036	1,080,036	1,080,034							4,320,142
26	MA06P00750106	4,320,142				1,080,036	1,080,036	1,080,036							3,240,108
27	MA06P00750107	4,320,142					1,080,036	1,080,036							2,160,072
28	MA06P00750108	4,320,142						1,080,036							1,080,036
29	MA06P00750109	4,320,142													-
30	MA06R00750100	93,346													93,346
31	MA06R00750101	95,470													95,470
32	MA06R00750102	92,765													92,765
33	MA06R00750103	204,319													204,319
34	<b>TOTAL</b>	<b>39,416,506</b>	<b>7,755,612</b>	<b>3,707,107</b>	<b>4,787,143</b>	<b>3,240,108</b>	<b>4,320,142</b>	<b>4,320,142</b>							<b>28,616,154</b>
35															
36	GRANT	250,000	250,000												250,000
37	FHLB	250,000	250,000												250,000
38	<b>TOTAL</b>	<b>500,000</b>	<b>500,000</b>												<b>500,000</b>
39															
40	GRANT	300,000		150,000	150,000										
41	FHLB	300,000		150,000	150,000										
42	<b>TOTAL</b>	<b>600,000</b>		<b>300,000</b>	<b>300,000</b>										<b>600,000</b>
43															
44	<b>DRUG ELIMINATION GRANT</b>														
45															
46	70101	404,900	404,900												404,900
47															
48	<b>ROSS - GRANT</b>	<b>45,254</b>	<b>45,254</b>												<b>45,254</b>
49															
50	<b>GRAND TOTAL</b>	<b>40,966,660</b>	<b>8,705,766</b>	<b>4,007,107</b>	<b>5,087,143</b>	<b>3,240,108</b>	<b>4,320,142</b>	<b>4,320,142</b>							<b>30,166,308</b>
51															
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67															
68															

# **ATTACHMENT B**

MA007b02

# **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.

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

**Annual Statement /  
Performance and Evaluation Report**

Part I: Summary  
Capital Funds Program (CFP)

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

OMB Approval 2577-0157 (Exp. 3/31/2002)

New Bedford, Massachusetts		Capital Funds Project Number		FFY of Approval	
<b>SAMPLE HOUSING AUTHORITY</b>		<b>CFFP Financing Proceeds</b>		<b>2005</b>	
<input checked="" type="checkbox"/> Original Annual Statement <input type="checkbox"/> Reserve for Disasters/Emergencies <input type="checkbox"/> Revised Annual Statement/Revision Number # <input type="checkbox"/> Performance and Evaluation Report for Program Year Ending _____					
<input type="checkbox"/> Final Performance and Evaluation Report					
Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost (2)	
		Original Revision #	Revised (2)	Obligated	Expended
1	Total Non-CFP Funds				
2	1406 Operations (May not exceed 20% of line 20 for PHAs with 250 or more Units)	\$100,000	\$0	\$0	\$0
3	1408 Management Improvements (May not exceed 20% of line 20)	\$100,000	\$0	\$0	\$0
4	1410 Administration (May not exceed 10% of line 20)	\$490,000	\$0	\$0	\$0
5	1411 Audit	\$0	\$0	\$0	\$0
6	1415 Liquidated Damages	\$0	\$0	\$0	\$0
7	1430 Fees and Costs	\$198,000	\$0	\$0	\$0
8	1440 Site Acquisition	\$0	\$0	\$0	\$0
9	1450 Site Improvement	\$235,000	\$0	\$0	\$0
10	1460 Dwelling Structures	\$1,497,522	\$0	\$0	\$0
11	1465.1 Dwelling Equipment - Nonexpendable	\$0	\$0	\$0	\$0
12	1470 Nondwelling Structures	\$0	\$0	\$0	\$0
13	1475 Nondwelling Equipment	\$0	\$0	\$0	\$0
14	1485 Demolition	\$0	\$0	\$0	\$0
15	1490 Replacement Reserve	\$0	\$0	\$0	\$0
16	1492 Moving to Work Demonstration	\$0	\$0	\$0	\$0
17	1495.1 Relocation Costs	\$5,000	\$0	\$0	\$0
18	1499 Mod Used for Development Activities	\$0	\$0	\$0	\$0
	1501 Collateralization	\$1,227,143			
19	1502 Contingency (may not exceed 8% of line 20)	\$119,684	\$0	\$0	\$0
20	Amount of CFFP Proceeds (Sum of lines 2 - 19)	\$3,972,349.00	\$0.00	\$0.00	\$0.00
21	Amount of line 20 Related to LBP Activities				
22	Amount of line 20 Related to Section 504 Compliance				
23	Amount of line 20 Related to Security	\$50,000			
24	Amount of line 20 Related to Energy Conservation Measures				
(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.			
Signature of Executive Director and Date		Signature of Public Housing Director/Office of Native American Programs Administrator and Date			

**Annual Statement /  
Performance and Evaluation Report**

**Part II: Supporting Pages**

**Capital Funds Program: Proposed Loan Funds**

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

New Bedford Housing Authority 2005 PHA Plan 12/03/04

MA007c02

OMB Approval 2577-0157 (Exp. 3/31/2002)

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 (2)
				Original	Revised (1)	Funds Obligated (2)	Funds Expended (2)	
PHA Wide	<b>1406 Operations</b>	1406		\$100,000.00	\$0.00	\$0.00	\$0.00	
PHA Wide	<b>1408 Management Improvements</b>	1408			\$0.00	\$0.00	\$0.00	
	Pre-screening to reduce unit turnover			\$60,000.00				
	Security coordination and oversight			\$40,000.00				
	<b>Total 1408</b>			<b>\$100,000.00</b>				
PHA Wide	<b>1410 Administration</b>	1410			\$0.00	\$0.00	\$0.00	
	Modernization Office Salaries and Benefits			\$442,000.00				
	Administration costs			\$48,000.00				
	<b>Total 1410</b>			<b>\$490,000.00</b>				
PHA Wide	<b>1411 Audits</b>	1411		\$0.00	\$0.00	\$0.00	\$0.00	
PHA Wide	<b>1415 Liquidated Damages</b>	1415		\$0.00	\$0.00	\$0.00	\$0.00	
PHA Wide	<b>1430 Fees and Cost</b>	1430						
	CLERK OF WORKS			\$40,000.00	\$0.00	\$0.00	\$0.00	
	A & E Fees: Shawmut/Satellite interior oversight			\$83,000.00	\$0.00	\$0.00	\$0.00	
	A & E Fees: Harwich Manor exterior renovations			\$75,000.00	\$0.00	\$0.00	\$0.00	
	<b>Total 1430</b>			<b>\$198,000.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	
PHA Wide	<b>1440 SITE ACQUISITION</b>	1440		\$0.00	\$0.00	\$0.00	\$0.00	
PHA Wide	<b>1450 Site Improvements:</b>	1450						
	Security Enhancement			\$50,000.00	\$0.00	\$0.00	\$0.00	
	Emergency Site Repairs			\$25,000.00	\$0.00	\$0.00	\$0.00	
	<b>Total 1450</b>			<b>\$75,000.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	
PHA Wide	<b>1460 Dwelling structures:</b>	1460						
	Vacancy Reduction Impact Team			\$250,000.00	\$0.00	\$0.00	\$0.00	
	Emergency Roof Repair			\$25,000.00	\$0.00	\$0.00	\$0.00	
	Emergency Heat Repair			\$25,000.00	\$0.00	\$0.00	\$0.00	
	<b>Total 1460</b>			<b>\$300,000.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	
PHA Wide	<b>1490 REPLACEMENT RESERVE</b>	1490		\$0.00	\$0.00	\$0.00	\$0.00	
PHA Wide	<b>1499 MOD USED FOR DEVELOPMENT</b>	1499		\$0.00	\$0.00	\$0.00	\$0.00	
	<b>SUBTOTAL</b>			<b>\$1,263,000</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	

**Annual Statement /  
Performance and Evaluation Report**

**Part II: Supporting Pages**

**Capital Funds Program: Proposed Loan Funds**

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

New Bedford Housing Authority 2005 PHA Plan 12/03/04

MA007c02

OMB Approval 2577-0157 (Exp. 3/31/2002)

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 (2)
				Original	Revised (1)	Funds Obligated (2)	Funds Expended (2)	
<b>MA06P007-01</b>	<b>Bay Village</b>							
	<b>1450 Site Improvements</b>	1450		\$0.00	\$0.00	\$0.00	\$0.00	
	<b>1460 Dwelling Structure</b>	1460						
	Contingency for bond-funded interior modernization			\$125,000.00	\$0.00	\$0.00	\$0.00	
	<b>Total 1460</b>			\$125,000.00	\$0.00	\$0.00	\$0.00	
	<b>1465 Dwelling Equipment</b>	1465		\$0.00	\$0.00	\$0.00	\$0.00	
	<b>1470 Non-Dwelling Structures</b>	1470		\$0.00	\$0.00	\$0.00	\$0.00	
	<b>1475 Non-Dwelling Equipment</b>	1475		\$0.00	\$0.00	\$0.00	\$0.00	
	<b>1485 DEMOLITION COSTS</b>	1485		\$0.00	\$0.00	\$0.00	\$0.00	
	<b>1495 RELOCATION COST</b>	1495		\$0.00	\$0.00	\$0.00	\$0.00	
	<b>Total Cost for Bay Village</b>			\$125,000.00	\$0.00	\$0.00	\$0.00	
<b>MA06P007-02</b>	<b>Presidential Heights</b>							
	<b>1450 Site Improvements</b>	1450		\$0.00	\$0.00	\$0.00	\$0.00	
	<b>1460 Dwelling Structure</b>	1460						
	Contingency for bond-funded interior modernization			\$125,000.00	\$0.00	\$0.00	\$0.00	
	<b>Total 1460</b>			\$125,000.00	\$0.00	\$0.00	\$0.00	
	<b>1465 Dwelling Equipment</b>	1465		\$0.00	\$0.00	\$0.00	\$0.00	
	<b>1470 Non-Dwelling Structures</b>	1470		\$0.00	\$0.00	\$0.00	\$0.00	
	<b>1475 Non-Dwelling Equipment</b>	1475		\$0.00	\$0.00	\$0.00	\$0.00	
	<b>1485 DEMOLITION COSTS</b>	1485		\$0.00	\$0.00	\$0.00	\$0.00	
	<b>1495 RELOCATION COST</b>	1495		\$0.00	\$0.00	\$0.00	\$0.00	
	<b>Total Cost for Presidential Heights</b>			\$125,000.00	\$0.00	\$0.00	\$0.00	

**Annual Statement /  
Performance and Evaluation Report**

**Part II: Supporting Pages**

**Capital Funds Program: Proposed Loan Funds**

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

New Bedford Housing Authority 2005 PHA Plan 12/03/04

MA007c02

OMB Approval 2577-0157 (Exp. 3/31/2002)

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 (2)
				Original	Revised (1)	Funds Obligated (2)	Funds Expended (2)	
MA06P007-02	<b>Adams Street</b>							
	<b>1450 Site Improvements: repave parking lot</b>	1450		\$10,000.00	\$0.00	\$0.00	\$0.00	
	<b>1460 Dwelling Structure</b>	1460						
	INTERIOR PAINTING			\$40,000.00	\$0.00	\$0.00	\$0.00	
	BATHROOM RENOVATION			\$30,000.00	\$0.00	\$0.00	\$0.00	
	KITCHEN RENOVATION			\$43,000.00	\$0.00	\$0.00	\$0.00	
	<b>Total 1460</b>			\$113,000.00	\$0.00	\$0.00	\$0.00	
	<b>1465 Dwelling Equipment</b>	1465		\$0.00	\$0.00	\$0.00	\$0.00	
	<b>1470 Non-Dwelling Structures</b>	1470		\$0.00	\$0.00	\$0.00	\$0.00	
	<b>1475 Non-Dwelling Equipment</b>	1475		\$0.00	\$0.00	\$0.00	\$0.00	
	<b>1485 DEMOLITION COSTS</b>	1485		\$0.00	\$0.00	\$0.00	\$0.00	
	<b>1495 RELOCATION COST</b>	1495		\$5,000.00	\$0.00	\$0.00	\$0.00	
	<b>Total Cost for Adams Street</b>			\$128,000.00	\$0.00	\$0.00	\$0.00	
	MA06P007-02	<b>Harwich Manor</b>						
<b>1450 Site Improvements</b>		1450		\$0.00	\$0.00	\$0.00	\$0.00	
<b>1460 Dwelling Structure</b>		1460						
Install New Exterior Siding				\$150,000.00	\$0.00	\$0.00	\$0.00	
Repair masonry entries				\$150,000.00	\$0.00	\$0.00	\$0.00	
<b>Total 1460</b>				\$300,000.00	\$0.00	\$0.00	\$0.00	
<b>1465 Dwelling Equipment</b>		1465		\$0.00	\$0.00	\$0.00	\$0.00	
<b>1470 Non-Dwelling Structures</b>		1470		\$0.00	\$0.00	\$0.00	\$0.00	
<b>1475 Non-Dwelling Equipment</b>		1475		\$0.00	\$0.00	\$0.00	\$0.00	
<b>1485 DEMOLITION COSTS</b>		1485		\$0.00	\$0.00	\$0.00	\$0.00	
<b>1495 RELOCATION COST</b>		1495		\$0.00	\$0.00	\$0.00	\$0.00	
<b>Total Cost for Harwich Manor</b>				\$300,000.00	\$0.00	\$0.00	\$0.00	

**Annual Statement /  
Performance and Evaluation Report**

**Part II: Supporting Pages**

Capital Funds Program: Proposed Loan Funds

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

New Bedford Housing Authority 2005 PHA Plan 12/03/04

MA007c02

OMB Approval 2577-0157 (Exp. 3/31/2002)

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 (2)
				Original	Revised (1)	Funds Obligated (2)	Funds Expended (2)	
<b>MA06P007-02</b>	<b>Satellite Village</b>							
	<b>1450 Site Improvements: Increase Parking</b>	1450		\$75,000.00	\$0.00	\$0.00	\$0.00	
	<b>1460 Dwelling Structure</b>	1460						
	INTERIOR PAINTING			\$86,212.00	\$0.00	\$0.00	\$0.00	
	BATHROOM RENOVATION			\$86,212.00	\$0.00	\$0.00	\$0.00	
	KITCHEN RENOVATION			\$94,837.00	\$0.00	\$0.00	\$0.00	
	<b>Total 1460</b>			\$267,261.00	\$0.00	\$0.00	\$0.00	
	<b>1465 Dwelling Equipment</b>	1465		\$0.00	\$0.00	\$0.00	\$0.00	
	<b>1470 Non-Dwelling Structures</b>	1470		\$0.00	\$0.00	\$0.00	\$0.00	
	<b>1475 Non-Dwelling Equipment</b>	1475		\$0.00	\$0.00	\$0.00	\$0.00	
	<b>1485 DEMOLITION COSTS</b>	1485		\$0.00	\$0.00	\$0.00	\$0.00	
	<b>1495 RELOCATION COST</b>	1495		\$0.00	\$0.00	\$0.00	\$0.00	
	<b>Total Cost for Shawmut Village</b>			\$342,261.00	\$0.00	\$0.00	\$0.00	
<b>MA06P007-02</b>	<b>Shawmut Village</b>							
	<b>1450 Site Improvements: Increase Parking</b>	1450		\$75,000.00	\$0.00	\$0.00	\$0.00	
	<b>1460 Dwelling Structure</b>	1460						
	INTERIOR PAINTING			\$86,212.00	\$0.00	\$0.00	\$0.00	
	BATHROOM RENOVATION			\$86,212.00	\$0.00	\$0.00	\$0.00	
	KITCHEN RENOVATION			\$94,837.00	\$0.00	\$0.00	\$0.00	
	<b>Total 1460</b>			\$267,261.00	\$0.00	\$0.00	\$0.00	
	<b>1465 Dwelling Equipment</b>	1465		\$0.00	\$0.00	\$0.00	\$0.00	
	<b>1470 Non-Dwelling Structures</b>	1470		\$0.00	\$0.00	\$0.00	\$0.00	
	<b>1475 Non-Dwelling Equipment</b>	1475		\$0.00	\$0.00	\$0.00	\$0.00	
	<b>1485 DEMOLITION COSTS</b>	1485		\$0.00	\$0.00	\$0.00	\$0.00	
	<b>1495 RELOCATION COST</b>	1495		\$0.00	\$0.00	\$0.00	\$0.00	
	<b>Total Cost for Satellite Village</b>			\$342,261.00	\$0.00	\$0.00	\$0.00	

<b>Annual Statement / Performance and Evaluation Report</b> <b>Part III: Implementation Schedule</b> Capital Fund Program	<b>U.S. Department of Housing and Urban Development</b> Office of Public and Indian Housing
OMB Approval No. 2577-0157 (Exp. 3/31/2002)	

Development Number / Name HA - Wide Activities	All Funds Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)			Reasons for Revised Target Dates (2)
	Original	Revised (1)	Actual (2)	Original	Revised (1)	Actual (2)	
PHA-Wide	09/30/07			09/30/08			
Bay Village	09/30/07			09/30/08			
Pres. Heights	09/30/07			09/30/08			
Adams St.	09/30/07			09/30/08			
Harwich Manor	09/30/07			09/30/08			
Shawmut Village	09/30/07			09/30/08			
Satellite Village	09/30/07			09/30/08			

To be completed for the Performance and Evaluation Report or a Revised Annual Statement.	(2) To be completed for the Performance and Evaluation Report.
Signature of Executive Director and Date	Signature of Public Housing Director/Office of Native American Programs Administrator and Date

# ATTACHMENT D

MA007d02

## COMMENTS OF RESIDENT ADVISORY BOARD

At the public hearing held August 12, 2004, at the Caroline Street Apartments, the Annual Plan for Fiscal Year 2005 and the Five-Year Plan for Fiscal Years 2005 – 2009 were discussed.

Tenant representatives from Boa Vista asked if they would be relocated for more than one day during the renovation of the building to accommodate a Group Adult Foster Care Program (*no*) and if they would be able to return to their original units (*that depended on whether or not they required assistance under the GAFC Program*).

Residents from Caroline Street asked if they could have bigger hot water units. They were advised that closet space would be lost if bigger hot water units were installed and that this was an issue that they should bring before their Tenant Organization and ultimately all the residents.

After reviewing the Annual Plan for Fiscal Year 2005 and the Five-Year Plan for Fiscal Years 2005 – 2009, the Resident Advisory Board offered no suggestive changes.

# **ATTACHMENT E**

**MA007e02**

# **COMMUNITY SERVICE**

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## NEW BEDFORD HOUSING AUTHORITY

### OPERATIONS MANUAL

**DATE:** February 1, 2001

**Release No. 77**

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

**SUBJECT:** COMMUNITY SERVICE POLICY

**REPLACES:** N/A

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#### *GENERAL*

In order to be eligible for continued occupancy, each adult member *age eighteen to sixty-two (18-62)* must either:

1. Contribute *eight hours per month* of community service (not including political activities) within the community in which the public housing development is located, or
2. Participate in an economic self-sufficiency program, or
3. Spend eight hours participating in a combination of self-sufficiency and community service activities unless he/she is exempt from this requirement.

#### *EXEMPTIONS*

The following adult family members of resident families are *exempt* from this requirement:

1. Family members who are sixty-two (62) or older.
2. Family members who are blind or disabled as defined under 216 (I)(1) or 1614 of the Social Security Act (42 USC 416(I)(1) and who certify that because of this disability are unable to comply with the community service requirements.
3. Family members who are the primary care giver for someone who is blind or disabled as defined above.
4. Family members engaged in work activity.
5. Family members who are exempt from work activity under Part A Title IV of the Social Security Act or under any other state welfare program, including the welfare-to-work program.
6. Family members receiving assistance, benefits, or services under a state program funded under Part A Title IV of the Social Security Act or under any other state welfare program, including welfare-to-work, and who are in compliance with that program.

### *NOTIFICATION OF THE REQUIREMENT*

Prior to implementation of the Community Service requirement, the ***New Bedford Housing Authority*** will notify all residents of the requirement and its proposed implementation.

The notification will advise families that their community service obligation will begin upon the effective date of their first annual re-examination on or after ***January 1, 2001***. It will inform residents of the exemptions from the requirements and the methods for establishing an exemption. It will also advise them that failure to comply with the Community Service requirement will result in ineligibility for continued occupancy at the time of any subsequent annual re-examination.

Community Service includes performing work or duties in the public that serve to improve the quality of life, and/or enhance resident self-sufficiency, and/or increase the self-responsibility of the resident within the community.

An economic self-sufficiency program is one that is designed to encourage, assist, train or facilitate the economic independence of participants and their families or to provide work for participants. These programs may include programs for job training, work placement, basic skills training, education, English proficiency, work fare, financial or household management, apprenticeship, and any program necessary to ready a participant to work (***such as substance abuse or mental health treatment***).

The ***New Bedford Housing Authority*** will coordinate with social service agencies, local schools, and human service agencies in identifying a list of volunteer community service positions.

Together with the ***Resident Advisory Board***, the ***New Bedford Housing Authority*** may create volunteer positions, such as hall monitoring, litter patrols, and supervising and record keeping for volunteers.

### *THE PROCESS*

At the time of initial implementation the ***New Bedford Housing Authority*** shall identify all family members who are apparently subject to the requirement. The Authority shall notify all such family members of the Community Service requirement and of the categories of individuals who are exempt from the requirement. The notification will provide the opportunity for family members to claim and explain an exempt status. The ***New Bedford Housing Authority*** shall verify such claims.

At the first annual re-examination on or after ***January 1, 2001***, and each annual re-examination thereafter, the ***New Bedford Housing Authority*** will do the following:

1. Provide a list of volunteer opportunities to the family members.
2. Provide information about obtaining suitable volunteer positions.
3. Provide a volunteer time sheet to the family member. Instructions for the time sheet require the individual to complete the form and have a supervisor date and sign for the period of work.
4. Thirty (30) days before the family's next lease anniversary date, the volunteer coordinator will advise the ***New Bedford Housing Authority*** whether each applicable adult family member is in compliance with the community service requirement.

*NOTIFICATION OF NON-COMPLIANCE  
WITH COMMUNITY SERVICE REQUIREMENT*

The ***New Bedford Housing Authority*** will notify any family whose eligible member(s) is (are) found to be in non-compliance with the Community Service requirement.

This determination is subject to the Grievance Procedure.

Unless each non-compliant family member enters into an agreement to comply with the Community Service requirement, the lease will not be renewed or will be terminated.

*OPPORTUNITY FOR CURE*

The ***New Bedford Housing Authority*** will offer each non-compliant family member the opportunity to enter into an agreement prior to the anniversary of the lease. The agreement shall state that the family member agrees to participate in an economic self-sufficiency program or agrees to perform community service activities for as many hours as needed to comply with the requirement over the past twelve-month period. The cure shall occur over the twelve-month period beginning with the date of the agreement; and the resident shall, at the same time, stay current with that year's community service requirement. The first hours a resident earns are applied to the current commitment until the current year's commitment is complete.

If any non-compliant family member does not accept terms of the agreement, does not fulfill his/her obligation to participate in an economic self-sufficiency program, or falls behind in his/her obligation under the agreement to perform community service, the ***New Bedford Housing Authority*** shall take action to terminate the lease.

*PROHIBITION AGAINST REPLACEMENT OF NBHA STAFF*

In implementing the Community Service requirement, The ***New Bedford Housing Authority*** may not substitute community service or self-sufficiency activities performed by residents for work ordinarily performed by its employees or replace a job at any location where residents perform activities to satisfy the service requirement.

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Joseph S. Finnerty  
Executive Director

# **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.

---

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.

---

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 2005 – 2009.

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. He was re-appointed on February 26, 2004. His term expires December 31, 2008.

# **ATTACHMENT J**

MA007j02

# **RESIDENT ADVISORY BOARD MEMBERS**

## 2005 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><i>Muriel Barksdale</i></b>	Caroline Apts.	20 Parker St. Ct.	NB 02740	508-992-1032
<b><i>Theresa Fortin</i></b>	Caroline Apts	40 Caroline St.	NB 02740	508-994-7280
<b><i>Paul Pelletier</i></b>	Boa Vista(504)	134 So. Second St.	NB 02740	508-555-1234
<b><i>Theresa Burke</i></b>	Boa Vista(208)	134 So. Second St	NB 02740	no phone
<b><i>Rosemarie Stolmieir</i></b>	Satellite	31 Apollo Dr.	NB 02745	508-995-1130
<b><i>Anita Burke</i></b>	Bay Village	126 Griffin Ct.	NB 02740	508-994-5709
<b><i>Carolyn Smodics</i></b>	Scattered	33 New Plainville	NB 02745	508-998-8944
<b><i>Emilio Cruz</i></b>	Pres. Hts.	329 Myrtle St.	NB 02746	508-990-1792
<b><i>Heidi Mendes</i></b>	Satellite	23 Apollo Dr.	NB 02745	508-998-2107

# **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

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

NAYS

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**

# **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		
Comprehensive Grant Program (CGP) <b>Part I: Summary</b>				
PHA Name				Comprehensive Grant Number
	New Bedford Housing Authority			MA06-P00750101
<input type="checkbox"/> Original Annual Statement <input type="checkbox"/> Reserve for Disasters/Emergencies <input type="checkbox"/> Revised Annual Statement/Revision Number _____ <input type="checkbox"/> Performance and Evaluation Report				
<input type="checkbox"/> 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	\$ 326,000.00
3	1408 Management Improvements	\$ 93,000.00	\$ 123,703.25	\$ 93,956.00
4	1410 Administration	\$ 395,000.00	\$ 395,000.00	\$ 395,000.00
5	1411 Audit			
6	1415 Liquidated Damages			
7	1430 Fees and Costs	\$ 210,000.00	\$ 189,488.51	\$ 189,488.51
8	1440 Site Acquisition			
9	1450 Site Improvement	\$ 285,000.00	\$ 599,928.93	\$ 599,956.02
10	1460 Dwelling Structures	\$ 2,779,543.00	\$ 2,792,318.08	\$ 2,822,248.55
11	1465.1 Dwelling Equipment - Nonexpendable	\$ 55,000.00	\$ 60,464.00	\$ 60,464.00
12	1470 Nondwelling Structures	\$ -		
13	1475 Nondwelling Equipment	\$ -		
14	1485 Demolition	\$ -		
15	1490 Replacement Reserve	\$ -		
16	1495.1 Relocation Costs	\$ 25,000.00	\$ 6,477.99	\$ 6,477.99
17	1498 Mod Used for Development			
18	1502 Contingency (may not exceed 8% of line 19)	\$ 362,482.00	\$ 37,644.24	\$ 324,837.76
19	Amount of Annual Grant (Sum of lines 2-18)	\$ 4,531,025.00	\$ 4,531,025.00	\$ 4,493,591.07
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 Public and Indian Housing				Office of		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	\$ 22,970.60	\$ 22,970.60	\$ 22,970.60		Funds shifted through fungibility		
Village	Replace repair heating system	1460	100	\$250,000	\$1,228,427.40	\$1,247,400.00	\$ 1,051,258.92		Funds shifted through fungibility		
	relocation	1495.1		\$25,000	\$ -	\$ -	\$ -		unchanged		
	Repair/paint walls and ceilings in units	1460	64	\$12,800	\$ -	\$ -	\$ -		Funds shifted through fungibility		
	Dwell Structures	1460		\$ -	\$ 22,970.00	\$ 22,970.00	\$ 22,970.00		Funds shifted through fungibility		
	Replace toilets and associated repairs	1460	15	\$60,000	\$ -	\$ -	\$ -		Funds shifted through fungibility		
	subtotal			\$836,138	\$ 1,274,368.00	\$1,293,340.60	\$1,097,199.52				
2. MA7-2	Interior renovations to abate lead	1460	100	\$850,505	\$ -	\$ -	\$ -		Funds shifted through fungibility		
Pres Hgts	repair replace heating system	1460		\$250,000	\$1,228,427.40	\$1,247,400.00	\$1,228,427.40		Funds shifted through fungibility		
	repair/replace clothes lines and common areas	1450		\$10,000	\$ -	\$ -	\$ -		Funds shifted through fungibility		
	Repair/paint walls and ceilings in units	1460	47	\$9,400	\$ -	\$ -	\$ -		Funds shifted through fungibility		
	Electrical Upgrade	1450		\$ -	\$ 591,396.12	\$ 591,396.12	\$ 591,369.12		Funds shifted through fungibility		
	subtotal			\$1,119,905	\$ 1,819,823.52	\$ 1,838,796.12	\$ 1,819,796.52				
3. MA7-3	Water line replacement	1450	150	\$200,000	\$ -	\$ -	\$ -		unchanged		
Brickenwood	Asbestos	1460	150	\$ -	\$ 291,846.59	\$ 291,846.59	\$ 291,846.59		Funds shifted through fungibility		
4. MA7-6 Boa Vista	Replace leaking roof	1460	100	\$85,000	\$ -	\$ -	\$ -		Funds shifted through fungibility		
5. MA7-7	Install automatic door opener, main entry	1460	49	\$20,000	\$ -	\$ -	\$ -		Funds shifted through fungibility		
Hillside Ct	Reconfigure community bathrooms to be HCP	1460	49	\$20,000	\$ -	\$ -	\$ -		Funds shifted through fungibility		
6. MA7-8	alleviate site flooding	1450		\$50,000	\$3,209	\$ 3,209.00	\$ 3,209.00		unchanged		
Harwich Manor	window repair/replacement	1460		\$50,000	\$ -	\$ -	\$ -		Funds shifted through fungibility		
7. MA7-8 Mosher St.	Repair/replace all rear decks	1460	4	\$28,000	\$58,800	\$ 58,800.00	\$ 58,800.00		unchanged		
8. MA7-10 Shawmut Village	finish exterior modernization	1460	30	\$125,000	\$ 19,717.50	\$ -	\$ -		Funds shifted through fungibility		
9. MA7-10 Satellite	finish exterior modernization	1460	30	\$125,000	\$19,717.50	\$19,717.50	\$19,717.50		Funds shifted through fungibility		
10. MA7-10 Chaffee/ Fairfield	window repair/replacement	1460		\$50,000	\$ -	\$ -	\$ -		Funds shifted through fungibility		
11. MA7-11 Adams St	Exterior Renovation and Deleading	1460		\$250,000	\$ -	\$ -	\$ -		Funds shifted through fungibility		
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 2001) Part II: Supporting Pages				U. S. Department of Housing and Urban Development Public and Indian Housing				Office of		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			
12. PHA wide	a) eliminate various site hazards (potholes, broken fencing, deteriorated sidewalks and stairs, etc.) as they are identified	1450		\$25,000	\$ -	\$ -	\$ -		Funds shifted through fungibility	
	b) Emergency heating repairs	1460		\$25,000	\$ -	\$ -	\$ -			
	c) eliminate utilities emergencies as they occur	1460		\$15,500	\$ 436.00	\$ 436.00	\$ 436.00		Funds shifted through fungibility	
	d) replace stoves at various sites	1465.1	240	\$55,000	\$ 60,464.00	\$ 60,464.00	\$ 60,464.00		Funds shifted through fungibility	
	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	\$198,858	\$198,858	\$198,858		Funds shifted through fungibility	
	subtotal			\$185,500	\$259,758	\$259,758	\$259,758			
13. PHA wide Management	a) Tenant pre-screening to reduce unit turnover	1408		\$53,000	\$ 19,157.00	\$ 19,157.00	\$ 19,157.00		Funds shifted through fungibility	
	b) Security initiatives	1408		\$40,000	\$ 74,799.00	\$ 74,799.00	\$ 74,799.00		Funds shifted through fungibility	
	subtotal			\$93,000	\$93,956	\$93,956	\$93,956			
	a) Modernization Office salaries & benefits	1410		\$340,000	\$180,733	\$180,733	\$ 23,778.78		Funds shifted through fungibility	
Administration	b) administration costs	1410		\$55,000	\$ 371,221.22	\$ 371,221.22	\$ 371,221.22		Funds shifted through fungibility	
	subtotal			\$ 395,000	\$ 551,955	\$ 551,955	\$ 395,000			
15. Fees & Costs	a) continue design interior renovations MA7-1	1430		\$55,000	\$ 5,178.80	\$ 5,178.80	\$ 5,178.80		Funds shifted through fungibility	
	b) Architectural services at various sites	1430		\$25,000	\$ 62,946.50	\$ 62,946.50	\$ 62,946.50		Funds shifted through fungibility	
	c) continue design interior renovations MA7-2	1430		\$55,000	\$ -	\$ -	\$ -		Funds shifted through fungibility	
	d) Engineering studies Pres Hgts MA 7-2	1430		\$5,000	\$ -	\$ -	\$ -		Funds shifted through fungibility	
	e) Engineering water line MA7-3	1430		\$50,000	\$ -	\$ -	\$ -		Funds shifted through fungibility	
	f) Interior design, space study at Boa Vista and Bay Village	1430		\$5,000	\$36,734.50	\$36,734.50	\$36,734.50		Funds shifted through fungibility	
	g) Engineering desing for replacement roofing Boa Vista MA7-6	1430		\$ 15,000	\$ 1,125	\$ 1,125.00	\$ 1,125.00		Funds shifted through fungibility	
	h) General Fees and Costs	1430		\$ 35,534.62	\$ 35,534.62	\$ 35,534.62	\$ 35,534.62		Funds shifted through fungibility	
	i) Hillside Ct.	1430		\$ 18,911.50	\$ 18,911.50	\$ 18,911.50	\$ 18,911.50		Funds shifted through fungibility	
	j) MA7-8 Window replacement	1430		\$ 14,000.00	\$ 14,000.00	\$ 9,000.00	\$ 9,000.00		Funds shifted through fungibility	
	subtotal			\$ 210,000	\$ 174,430.92	\$ 174,430.92	\$ 169,430.92			
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)			Reasons for Revised Target Dates (2)				
Number/Name	Original	Revised (2)	Actual (2)	Original	Revised (2)	Actual (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	30-Jun-05						
Bay Village											
2. MA7-2	30-Sep-02	30-Jun-03		31-Mar-03	30-Jun-05						
Presidential Hgts											
3. MA7-3	30-Sep-02	30-Jun-03		31-Mar-03	30-Jun-05						
Brickenwood											
4. MA7-6	30-Sep-02	30-Jun-03		31-Mar-03	30-Jun-05						
Boa Vista											
5. MA7-7	30-Sep-02	30-Jun-03		31-Mar-03	30-Jun-05						
Hillside Ct											
6. MA7-8	30-Sep-02	30-Jun-03		31-Mar-03	30-Jun-05						
Harwich Manor											
7. MA7-8	30-Sep-02	30-Jun-03		31-Mar-03	30-Jun-05						
Mosher St											
8. MA7-10	30-Sep-02	30-Jun-03		31-Mar-03	30-Jun-05						
Shawmut Village											
9. MA7-10	30-Sep-02	30-Jun-03		31-Mar-03	30-Jun-05						
Satellite Village											
10. MA7-10	30-Sep-02	30-Jun-03		31-Mar-03	30-Jun-05						
Chaffee											
11. MA7-11	30-Sep-02	30-Jun-03		31-Mar-03	30-Jun-05						
Adams St											
12. PHA wide											
a)	30-Sep-02	30-Jun-03		31-Mar-03	30-Jun-05						
b)	30-Sep-02	30-Jun-03		31-Mar-03	30-Jun-05						
c)	30-Sep-02	30-Jun-03		31-Mar-03	30-Jun-05						
d)	30-Sep-02	30-Jun-03		31-Mar-03	30-Jun-05						
e)	30-Sep-02	30-Jun-03		31-Mar-03	30-Jun-05						
f)	30-Sep-02	30-Jun-03		31-Mar-03	30-Jun-05						
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)			Reasons for Revised Target Dates (2)	
Number/Name	Original	Revised (2)	Actual (2)	Original	Revised (2)	Actual (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	30-Jun-05			
b)	30-Sep-02	30-Jun-03		31-Mar-03	30-Jun-05			
14. PHA wide Administration								
a)	30-Sep-02	30-Jun-03		31-Mar-03	30-Jun-05			
b)	30-Sep-02	30-Jun-03		31-Mar-03	30-Jun-05			
15. Fees & Costs								
a)	30-Sep-02	30-Jun-03		31-Mar-03	30-Jun-05			
b)	30-Sep-02	30-Jun-03		31-Mar-03	30-Jun-05			
c)	30-Sep-02	30-Jun-03		31-Mar-03	30-Jun-05			
d)	30-Sep-02	30-Jun-03		31-Mar-03	30-Jun-05			
e)	30-Sep-02	30-Jun-03		31-Mar-03	30-Jun-05			
f)	30-Sep-02	30-Jun-03		31-Mar-03	30-Jun-05			
g)	30-Sep-02	30-Jun-03		31-Mar-03	30-Jun-05			
h)		30-Jun-03			30-Jun-05			
i)		30-Jun-03			30-Jun-05			
j)		30-Jun-03			30-Jun-05			

Annual Statement / Performance and Evaluation Report Comprehensive Grant Program (CGP) <b>Part I: Summary</b>		U. S. Department of Housing and Urban Development Office of Publi		OMB Approval No 2577-0157(exp 7/31/98)	
PHA Name		Comprehensive Grant Number	FY of Grant Approval		
	New Bedford Housing Authority	MA06-P00750202	FY2002		
<input type="checkbox"/> Original Annual Statement <input type="checkbox"/> Reserve for Disasters/Emergencies <input type="checkbox"/> Revised Annual Statement/Revision Number _____ <input type="checkbox"/> Performance and Evaluation Report for Program Year Ending <u>6/30/04</u>					
<input type="checkbox"/> 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)	\$ 139,000.00	\$ 139,000.00	\$ 139,000.00	
3	1408 Management Improvements	\$ 93,000.00	\$ 96,205.00	\$ 93,000.00	\$ 96,205.00
4	1410 Administration	\$ 395,000.00	\$ 395,000.00	\$ 395,000.00	\$ 232,419.03
5	1411 Audit				
6	1415 Liquidated Damages				
7	1430 Fees and Costs	\$ 115,142.00	\$ 508,658.10	\$ 456,883.93	\$ 508,657.44
8	1440 Site Acquisition				
9	1450 Site Improvement	\$ 277,000.00	\$ 61,637.00	\$ 61,637.00	\$ 61,637.00
10	1460 Dwelling Structures	\$ 2,723,000.00	\$ 2,644,876.90	\$ 2,246,130.35	\$ 846,361.60
11	1465.1 Dwelling Equipment - Nonexpendable	\$ 97,000.00	\$ 97,000.00	\$ 97,000.00	\$ 55,440.00
12	1470 Nondwelling Structures	\$ 10,000.00	\$ -		
13	1475 Nondwelling Equipment	\$ -			
14	1485 Demolition	\$ -			
15	1490 Replacement Reserve	\$ -			
16	1495.1 Relocation Costs	\$ -			
17	1498 Mod Used for Development	\$ -			
18	1501.1 Financial	\$ 382,000.00	\$ 382,000.00	\$ 382,000.00	
18	1502 Contingency (may not exceed 8% of line 19)	\$ 93,235.00	\$ -	\$ 93,235.00	\$ 93,235.00
19	Amount of Annual Grant (Sum of lines 2-18)	\$ 4,324,377.00	\$ 4,324,377.00	\$ 3,963,886.28	\$ 1,893,955.07
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 Programs Administrator and Date			



Annual Statement / Performance and Evaluation Report				U. S. Department of Housing and Urban Development and Public and Indian Housing Office				B Approval No 2577-0157(exp 7/31/98)
Comprehensive Grant Program (CGP 2002) 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
				Original	Revised(1)	Funds Obligated (2)	Funds Expended	
HA-Wide Activities								
1. MA7-2	Heating Decentralization	1460	200	\$900,000	\$0	\$-	\$-	Funds shifted through fungibility
Pres Hgts	Install additional support on rear entry overhangs	1460	200	\$45,000	\$114,000	\$114,000.00	\$108,300.00	unchanged
	Electrical Distribution	1450	200	\$10,000	\$47,482.00	\$47,482.00	\$47,482.00	Funds shifted through fungibility
	Gas Piping	1450	200	\$25,000	\$0	\$-	\$-	Funds shifted through fungibility
	Site Improvements	1450	200	\$60,000	\$-	\$-	\$-	Funds shifted through fungibility
	Remove asbestos wrapped heating pipe insulation from building basements	1460	0	\$400,000	\$0	\$-	\$-	Funds shifted through fungibility
2. MA7-3	Roof replacement	1460	300	\$100,000	\$0	\$0	\$0	Funds shifted through fungibility
Brickwood	Roof replacement	1460	200	\$100,000	\$0	\$0	\$0	Funds shifted through fungibility
3. MA7-4 Westlawn	Conversion of 3 floors to "assisted living"	1460		\$200,000	\$200,000			unchanged
4. MA7-6 Boa Vista	Unit Consolidation	1460	47	\$75,000	\$0	\$-	\$-	Funds shifted through fungibility
5. MA7-7 Hillside Ct.	Laundry room upgrade	1470		\$5,000	\$5,000	\$-	\$-	unchanged
	subtotal			\$80,000	\$5,000	\$-	\$-	
	Replace original windows with vinyl clad double hung sash	1460	30	\$100,000	\$60,879	\$135,000.00	\$135,879.00	Funds shifted through fungibility
6. MA7-8 Harwich Manor	Replace entry & screen doors & replace/repair worn/rotted thresholds as needed	1460	30	\$65,000	\$8,000	\$-	\$-	Funds shifted through fungibility
	subtotal			\$165,000	\$68,879	\$135,000	\$135,879.00	
	Install paved parking are to replace unpaved lot	1450	4	\$7,000	\$0	\$-	\$-	Funds shifted through fungibility
7. MA7-8 Mosher St.	Replace exterior siding	1460	170	\$781,515	\$212,746	\$867,515.00	\$-	Funds shifted through fungibility
8. MA7-10 Shawmut Village	Parking Improvements	1450		\$12,500	\$0	\$-	\$-	Funds shifted through fungibility
	Replace exterior siding	1460	146	\$781,515	\$212,745.61	\$867,515.00	\$78,471.61	Funds shifted through fungibility
9. MA7-10 Satellite Village	Parking Improvements	1450		\$12,500	\$9,754.39			Funds shifted through fungibility
10. MA7-11	Laundry room upgrade	1470	24	\$5,000	\$0			Funds shifted through fungibility
Adams St	Repair croniclly leaking hotwater distribution pipes buried in concrete slab	1460	24	\$50,000.00	\$-	\$-	\$-	Funds shifted through fungibility
	Upgrade interior fire protection door system; install automatic closing devices	1460	24	\$25,000.00	\$12,500.00			Funds shifted through fungibility
11. MA7-12 Dottin Place	Repair cracks in building slabs, per PHAS inspection	1460	93	\$23,000	\$11,500			Funds shifted through fungibility
	Drainage Improvements	1450		\$25,000.00	\$-			Funds shifted through fungibility
12. MA7-21	Emergency repairs to exterior envelop	1460	43	\$10,000	\$5,000			Funds shifted through fungibility
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 2002) Part II: Supporting Pages				U. S. Department of Housing and Urban Development of Public and Indian Housing				Office		B 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				
13. PHA wide	a) Collateralize financial instruments for interior modernization goals: kitchen /bath and interior painting at MA7-2 and MA7-3, sprinkler system at MA7-6	1501.1	600	\$382,000	\$382,000				unchanged		
	b) Emergency repairs for unforeseen repairs/replacements to heating systems	1460		\$50,000	\$0				unchanged		
	c) Investigate, implement upgrades for baths/kitchens in anticipation of unit modernization MA7-10, MA7-7	1460		\$75,000	\$0				Funds shifted through fungibility		
	d) replace of stoves	1465.1		\$55,000	\$0				Funds shifted through fungibility		
	e) emergency roof repairs	1460		\$10,000	\$0				Funds shifted through fungibility		
	f) Address site deficiencies from PHAS inspections (trees, paving, steps, drives)	1450		\$125,000	\$0				Funds shifted through fungibility		
	g) Vacancy reduction: independent contractors renovating units at turnover	1460		\$75,000	\$81,456	\$81,456	\$81,456		unchanged		
	h) Refrigerator replacement of defective HUD/DOE approved maytags	1465.1		\$42,000	\$97,000	\$97,000	\$55,400		Funds shifted through fungibility		
14. PHA wide Management	a) Pre-screening to reduce unit turnover	1408		\$53,000	\$21,555	\$21,555	\$21,555		Funds shifted through fungibility		
	b) Security initiatives	1408		\$40,000	\$74,650	\$74,650	\$74,650		Funds shifted through fungibility		
	subtotal			\$93,000	\$96,205	\$96,205	\$96,205		unchanged		
									unchanged		
15. PHA wide	a) Modernization Office salaries & benefits	1410		\$340,000	\$340,000	\$340,000.00			unchanged		
Administration	b) administration costs	1410		\$55,000	\$55,000	\$55,000.00			unchanged		
	subtotal			\$395,000	\$395,000	\$395,000	\$-		unchanged		
									unchanged		
16. Fees & Costs	a) A/E design MA7-11 pipe replacement	1430		\$10,000	\$5,400	\$5,400.00	\$5,400.00		Funds shifted through fungibility		
	b) Engineering and monitoring Asbestos abatement MA7-4	1430		\$50,000	\$0	\$-	\$-		Funds shifted through fungibility		
	c) Financial consulting interior loan fund	1430		\$55,142	\$55,142	\$55,142.00	\$-		unchanged		
	d) MA7-1 Interior	1430			\$9,098.93	\$9,098.93			Funds shifted through fungibility		
	e) MA7-2 Electrical Dist.	1430			\$0.00	\$0.00			Funds shifted through fungibility		
	f) MA7-10 Shawmut Fascades	1430			\$380,114.00	\$380,114.00	\$330,736.00		Funds shifted through fungibility		
	g)MA7-10 Sat Facades	1430			\$90	\$90	\$90		Funds shifted through fungibility		
	h)Chaffee/Fairfield	1430			\$23,500	\$23,500	\$17,500				
	i)Dotin PHA 7-12	1430			\$9,500	\$6,131	\$6,131				
	J)MA7-11 Adams St	1430			\$14,250	\$14,250	\$0				
	K)Bond Consulting	1430			\$7,650	\$7,650	\$7,650				
	L)Fees & Costs	1430			\$7,281	\$7,281	\$7,281				
	subtotal			\$115,142	\$449,845	\$508,656.93	\$374,788.00				
17. Operations	Operations	1406		\$139,000	\$139,000	\$139,000					
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.											



Annual Statement / Performance and Evaluation Report				U. S. Department of Housing and Urban Development Office of Public and Indian Housing			o 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)			Reasons for Revised Target Dates (2)
Number/Name	Original	Revised (2)	Actual (2)	Original	Revised (2)	Actual (2)	
Activities							
1. MA7-2 Presidential Hgts	31-May-04			31-May-06			
2. MA7-3 Brickenwood	31-May-04			31-May-06			
3. MA7-4 Westlawn	31-May-04			31-May-06			
4. MA7-6 Boa Vista	31-May-04			31-May-06			
5. MA7-7 Hillside Ct	31-May-04			31-May-06			
6. MA7-8 Harwich Manor	31-May-04			31-May-06			
7. MA7-8 Mosher St	31-May-04			31-May-06			
8. MA7-10 Shawmut Village	31-May-04			31-May-06			
9. MA7-10 Satellite Village	31-May-04			31-May-06			
10. MA7-11 Adams St	31-May-04			31-May-06			
11. MA7-12 Dottin Place	31-May-04			31-May-06			
12. MA7-21	31-May-04			31-May-06			
13. PHA wide							
a)	31-May-04			31-May-06			
b)	31-May-04			31-May-06			
c)	31-May-04			31-May-06			
d)	31-May-04			31-May-06			
e)	31-May-04			31-May-06			
f)	31-May-04			31-May-06			
Signature of Executive Director and Date				Signature of Public Housing Director/Office of Native American Programs & 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			o 2577-0157(exp 7/31/98)
Comprehensive Grant Program (CGP) Part III: Implementation Schedule				Office of Public and Indian Housing			
Development Number/Name	All Funds Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)			Reasons for Revised Target Dates (2)
HA-Wide	Original	Revised (2)	Actual (2)	Original	Revised (2)	Actual (2)	
Activities							
g)	31-May-04			31-May-06			
h)	31-May-04			31-May-06			
14. PHA wide Management							
a)	31-May-04			31-May-06			
b)	31-May-04			31-May-06			
15. PHA wide Administration							
a)	31-May-04			31-May-06			
b)	31-May-04			31-May-06			
16. Fees & Costs							
a)	31-May-04			31-May-06			
b)	31-May-04			31-May-06			
c)	31-May-04			31-May-06			
d)		31-May-04			31-May-06		
e)		31-May-04			31-May-06		
f)		31-May-04			31-May-06		
17. Operations	31-May-04			31-May-06			

Annual Statement / Performance and Evaluation Report		U. S. Department of Housing and Urban Development Office of Public			
Comprehensive Grant Program (CGP) Part I: Summary					
PHA Name				Comprehensive Grant Number	FFY of Grant Approval
	New Bedford Housing Authority			MA06-P00750202	FY2003
<input type="checkbox"/> Original Annual Statement <input type="checkbox"/> Reserve for Disasters/Emergencies <input type="checkbox"/> Revised Annual Statement/Revision Number _____ <input type="checkbox"/> Performance and Evaluation Report for Program Year Ending 6/30/04					
<input type="checkbox"/> 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)	\$350,000	\$350,000	\$350,000	\$ -
3	1408 Management Improvements	\$ 93,000.00	\$ 93,000.00	\$ 93,000.00	\$ 28,285.84
4	1410 Administration	\$ 432,014.00	\$ 432,014.00	\$ 432,014.00	\$ -
5	1411 Audit				
6	1415 Liquidated Damages				
7	1430 Fees and Costs	\$ 250,000.00	\$ 320,715.53	\$ 88,115.53	\$ 7,657.00
8	1440 Site Acquisition				
9	1450 Site Improvement	\$ 150,000.00	\$ 175,218.40	\$ 25,218.40	\$ 25,218.40
10	1460 Dwelling Structures	\$ 1,932,258.00	\$ 2,337,090.07	\$ 2,394,639.27	\$ 272,970.27
11	1465.1 Dwelling Equipment - Nonexpendable	\$ 97,000.00	\$ 97,000.00	\$ 6,600.00	\$ 6,600.00
12	1470 Nondwelling Structures				
13	1475 Nondwelling Equipment				
14	1485 Demolition				
15	1490 Replacement Reserve				
16	1495.1 Relocation Costs				
17	1498 Mod Used for Development				
18	1501.1 Financial				
18	1502 Contingency (may not exceed 8% of line 19)	\$ 125,766.00	\$ 125,766.00	\$ -	\$ -
19	Amount of Annual Grant (Sum of lines 2-18)	\$3,430,038	\$3,930,804	\$3,389,587	\$ 340,731.51
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 Programs Administrator and Date			

Annual Statement / Performance and Evaluation Report				U. S. Department of Housing and Urban Development Office of Public and Indian Housing				MB Approval No 2577-0157(exp 7/31/98)
Comprehensive Grant Program (CGP 2003) Part II: Supporting Pages								
Development	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost		Status of Proposed Work
Number/Name				Original	Revised(1)	Funds Obligated (2)	Funds Expended	
HA-Wide								
Activities								
1. MA7-1 Bay Village	Interior Modernization: Kitchens and baths/Improve a	1460	200	\$100,000	\$0	\$0	\$0	Funds shifted through fungibility
	Heating Improvements	1460	200	\$50,000	\$0	\$0	\$0	Funds shifted through fungibility
	Ventilation	1460			\$2,258	\$2,258	\$0	Funds shifted through fungibility
	Heating Improvements	1460	200	\$50,000	\$50,000	\$ -	\$ -	unchanged
2. MA7-2 Fencing	Fencing	1450			\$25,218	\$ 25,218.00	\$ 25,218.00	Funds shifted through fungibility
	heating	1460			\$50,000	\$ -	\$ -	Funds shifted through fungibility
3. MA7-3 Brickenwood	Replace Roofs	1460	25	\$100,000	\$ 70,608.00	\$ 70,608.00	\$ 70,608.00	Funds shifted through fungibility
4.MA7-4 Westlawn	Replace Roofs	1460	25	\$100,000	\$104,537	\$ 104,537.00	\$ 104,537.00	Funds shifted through fungibility
	Electrical Improvements	1460	47	\$40,000	\$0	\$0	\$0	Funds shifted through fungibility
5. MA-7-10 Caroline St.	Site Security: Lighting, fencing, access.	1450	64	\$50,000	\$50,000	\$ -	\$ -	unchanged
6. MA-7-10 Shawmut Village	Exterior Siding	1450	170	\$500,000	\$881,235	\$ 1,060,834.50	\$ -	Funds shifted through fungibility
	Electrical Improvements for stoves	1460	170	\$75,000	\$0	\$ -	\$ -	Funds shifted through fungibility
	Gas line replacement	1450	43	\$50,000	\$50,000	\$ -	\$ -	Funds shifted through fungibility
7. MA-7-10 Satellite Village	Exterior Siding	1450	146	\$500,000	\$881,235	\$ 1,060,834.50	\$ -	Funds shifted through fungibility
	Electrical Improvements for stoves	1460	170	\$75,000	\$75,000	\$ -	\$ -	unchanged
	Gas line replacement	1450	43	\$50,000	\$50,000	\$ -	\$ -	Funds shifted through fungibility
8. MA-7-11Chaffee Fairfield	Exterior Siding/ replace cellar stairs and doors	1460	16	\$300,000	\$300,000	\$ -	\$ -	Funds shifted through fungibility
9. MA7-21	Repairs to exterior envelope	1460	43	\$195,000	\$0.00	\$0.00	\$ -	Funds shifted through fungibility
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				MB Approval No 2577-0157(exp 7/31/98)
Comprehensive Grant Program (CGP 2003) Part II: Supporting Pages								
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	
10. PHA wide								
PHA wide	a) Emergency funds for unforeseen repairs/replacements to heating systems	1460		\$50,000	\$0	\$ -	\$ -	Funds shifted through fungibility
MA 7-7		1460						
MA 7-10	b) Implement upgrades for baths/kitchens in anticipation of unit modernization MA7-10, MA7-7	1460		\$75,000	\$0	\$ -	\$ -	Funds shifted through fungibility
PHA wide	c) Replacement of stoves	1465.1		\$55,000	\$55,000	\$ -	\$ -	unchanged
PHA wide	d) Emergency roof repairs	1460		\$20,000	\$20,000	\$0	\$0	unchanged
PHA wide	e) Vacancy reduction: independent contractors	1465.1		\$90,000	\$96,957	\$96,957	\$96,957	Funds shifted through fungibility
PHA wide	f) Refrigerator replacement of defective HUD/DOE	1465.1		\$42,000	\$42,000	\$6,600	\$6,600	unchanged
12. PHA wide	a) Pre-screening to reduce unit turnover	1408		\$53,000	\$53,000	\$4,164	\$4,164	unchanged
Management	b) Security coordination & oversight	1408		\$40,000	\$40,000	\$24,121	\$24,121	unchanged
13. PHA wide	a) Modernization Office salaries & benefits	1410		\$402,014	\$402,014	\$0	\$0	unchanged
Administration	b) administration costs	1410		\$30,000	\$ 30,000.00	\$ -	\$ -	unchanged
14. Fees & Costs	a) Hillside Ct. Electrical Engineering	1430		\$5,000	\$5,000	\$ 3,780.00	\$ 2,457.00	unchanged
	b) Boa Vista Electrical Engineering	1430		\$10,000	\$10,000	\$ -	\$ -	unchanged
	c) Chaffee Fairfield	1430		\$50,000	\$ 50,000.00	\$ -	\$ -	unchanged
	c) Shawmut Village	1430		\$77,500	\$77,500	\$ -	\$ -	unchanged
	d) Satellite Village	1430		\$77,500	\$77,500	\$ -	\$ -	unchanged
	e) Shawmut electrical engineering	1430		\$15,000	\$15,000	\$ 7,620.00	\$ -	unchanged
	f) Satellite electrical engineering	1430		\$15,000	\$15,000	\$ 6,000.00	\$ -	unchanged
	g) Fees & Costs	1430			\$5,200	\$ 5,200.00	\$ 5,200.00	Funds shifted through fungibility
	h)Cable Wires	1460			\$868	\$ 868.27	\$ 868.27	Funds shifted through fungibility
15 Operations	Operations	1406		\$350,000	\$350,000	\$0.00	\$ -	unchanged
16 PHA Wide Contingency	Contingency	1502		\$125,766	\$125,766.00	\$125,766.00	\$125,766.00	unchanged
Signature of Executive Director and Date				Signature of Public Housing Director/Office of Native American Programs Administrator and Date				

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

2 To be completed for the Performance and Evaluation Report							
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Annual Statement / Performance and Evaluation Report				U. S. Department of Housing and Urban Development			io 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)			Reasons for Revised Target Dates (2)
Number/Name	Original	Revised (2)	Actual (2)	Original	Revised (2)	Actual (2)	
HA-Wide							
Activities							
g)	31-May-04			31-May-06			
h)	31-May-04			31-May-06			
14. PHA wide Management							
a)	31-May-04			31-May-06			
b)	31-May-04			31-May-06			
15. PHA wide							
Administration							
a)	31-May-04			31-May-06			
b)	31-May-04			31-May-06			
16. Fees & Costs							
a)	31-May-04			31-May-06			
b)	31-May-04			31-May-06			
c)	31-May-04			31-May-06			
d)		31-May-04			31-May-06		
e)		31-May-04			31-May-06		
f)		31-May-04			31-May-06		
17. Operations	31-May-04			31-May-06			

Annual Statement / Performance and Evaluation Report		U. S. Department of Housing and Urban Development			
Comprehensive Grant Program (CGP) <b>Part I: Summary</b>		Office of Public Housing			
PHA Name				Comprehensive Grant Number	FFY of Grant Approval
	New Bedford Housing Authority			MA06-P00750202	FY2003
<input type="checkbox"/> Original Annual Statement <input type="checkbox"/> Reserve for Disasters/Emergencies <input type="checkbox"/> Revised Annual Statement/Revision Number _____ <input type="checkbox"/> Performance and Evaluation Report for Program Year Ending 6/30/04					
<input type="checkbox"/> 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)				
3	1408 Management Improvements				
4	1410 Administration				
5	1411 Audit				
6	1415 Liquidated Damages				
7	1430 Fees and Costs				
8	1440 Site Acquisition				
9	1450 Site Improvement	\$ 25,000.00	\$ -	\$ -	\$ -
10	1460 Dwelling Structures	\$ 699,314.00	\$ 324,314.00	\$ -	\$ -
11	1465.1 Dwelling Equipment - Nonexpendable				
12	1470 Nondwelling Structures				
13	1475 Nondwelling Equipment				
14	1485 Demolition				
15	1490 Replacement Reserve				
16	1495.1 Relocation Costs				
17	1498 Mod Used for Development				
18	1501.1 Financial				
18	1502 Contingency (may not exceed 8% of line 19)				
19	Amount of Annual Grant (Sum of lines 2-18)				
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 Programs Administrator and Date			



Annual Statement / Performance and Evaluation Report				U. S. Department of Housing and Urban Development Office of Public and Indian Housing							
Comprehensive Grant Program (CGP 2003) Part II: Supporting Pages											
Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Quantity	Total Estimated Cost		Total Actual Cost					
				Original	Revised(1)	Funds Obligated (2)	Funds Expended				
				1. MA7-2 Fencing	Mod Kitchen & Bath	1460		\$2,314	\$2,314	\$ -	\$ -
				2. MA-7-6 Boa Vista	Boiler Replacement	1460	2	\$100,000	\$0	\$ -	\$ -
	Electrical Improvements	1460		\$75,000	\$0	\$ -	\$ -				
3. MA7-7	Unit Consolidation	1460		\$75,000	\$0	\$ -	\$ -				
	Electrical	1460		\$40,000	\$40,000	\$ -	\$ -				
4. MA-7-10	Site Security: Lighting, fencing, access.	1450		\$25,000	\$25,000	\$ -	\$ -				
5. MA-7-10 Shawmut Village	Exterior Siding	1460		\$157,000	\$157,000	\$ -	\$ -				
	Electric stoves	1460		\$37,500	\$0	\$ -	\$ -				
6. MA-7-10 Satellite Village	Exterior Siding	1460		\$125,000	\$125,000	\$ -	\$ -				
	Electric stoves	1460		\$37,500	\$0	\$ -	\$ -				
	Gas line replacement	1450	43	\$50,000	\$50,000	\$ -	\$ -				
7. MA-7-11 Chaffee Fairfield	Exterior Siding/ replace cellar stairs and doors	1460	16	\$300,000	\$300,000	\$ -	\$ -				
8. MA7-21	Repairs to exterior envelope	1460	43	\$195,000	\$0.00	\$0.00	\$ -				
PHA Wide Emergency				\$50,000	\$0.00	\$0.00	\$0.00				
Signature of Executive Director and Date				Signature of Public Housing Director/Office of Native American P							

MB Approval No 2577-0157(exp 7/31/98)
Status of Proposed Work
unchanged
Funds shifted through fungibility
unchanged
Funds shifted through fungibility
Funds shifted through fungibility
unchanged
Funds shifted through fungibility
Programs Administrator and Date

Annual Statement / Performance and Evaluation Report				U. S. Department of Housing and Urban Development Office of Public and Indian Housing			o 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 Bay Village	28-Feb-05			28-Feb-07				
2. MA7-2 Pres Hgts	28-Feb-05			28-Feb-07				
3. MA7-3 Brickenwood	28-Feb-05			28-Feb-07				
4. MA7-4 Westlawn	28-Feb-05			28-Feb-07				
5. MA7-6 Boa Vista	28-Feb-05			28-Feb-07				
6. MA7-7 Hillside	28-Feb-05			28-Feb-07				
7. MA7-8 Harwich Manor	28-Feb-05			28-Feb-07				
8. MA7-8 Mosher Street	28-Feb-05			28-Feb-07				
9. MA7-10 Shawmut	28-Feb-05			28-Feb-07				
10. MA7-10 Satellite	28-Feb-05			28-Feb-07				
11. MA7-10 Caroline St.	28-Feb-05			28-Feb-07				
12. MA7-11 Chafee Farefield	28-Feb-05			28-Feb-07				
13. MA7-11 Adams	28-Feb-05			28-Feb-07				
14. MA7-12 Dottin Place	28-Feb-05			28-Feb-07				
15. MA7-21 Scattered	28-Feb-05			28-Feb-07				
16. PHA wide	28-Feb-05			28-Feb-07				
17. PHA wide Manage	28-Feb-05			28-Feb-07				
18. PHA wide Admin	28-Feb-05			28-Feb-07				
19. Fees & Costs	28-Feb-05			28-Feb-07				
20. Operations	28-Feb-05			28-Feb-07				