PHA Plans

Streamlined 5-Year/Annual Version

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

OMB No. 2577-0226
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This information collection is authorized by Section 511 of the Quality Housing and Work Responsibility Act, which added a new section 5A to the U.S. Housing Act of 1937 that introduced 5-year and annual PHA Plans. The full PHA plan provides a ready source for interested parties to locate basic PHA policies, rules, and requirements concerning the PHA's operations, programs, and services, and informs HUD, families served by the PHA, and members of the public of the PHA's mission and strategies for serving the needs of low-income and very low-income families. This form allows eligible PHAs to make a streamlined annual Plan submission to HUD consistent with HUD's efforts to provide regulatory relief to certain PHAs. Public reporting burden for this information collection is estimated to average 11.7 hours per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. HUD may not collect this information and respondents are not required to complete this form, unless it displays a currently valid OMB Control Number.

Privacy Act Notice. The United States Department of Housing and Urban Development, Federal Housing Administration, is authorized to solicit the information requested in this form by virtue of Title 12, U.S. Code, Section 1701 et seq., and regulations promulgated thereunder at Title 12, Code of Federal Regulations. Information in PHA plans is publicly available.

Streamlined 5-Year Plan for Fiscal Years 2005 - 2009
Streamlined Annual Plan for Fiscal Year 2005

Beverly Housing Authority

MA044v05

NOTE: This PHA Plan template (HUD-50075-SA) is to be completed in accordance with instructions contained in previous Notices PIH 99-33 (HA), 99-51 (HA), 2000-22 (HA), 2000-36 (HA), 2000-43 (HA), 2001-4 (HA), 2001-26 (HA), 2003-7 (HA), and any related notices HUD may subsequently issue. Full reporting for each component listed in the streamlined Annual Plan submitted with the 5-year plan is required.

Streamlined Five-Year PHA Plan
Agency Identification

PHA Name: Beverly Housing Authority **PHA Number:** MA044
PHA Fiscal Year Beginning: (mm/yyyy) 04/2005

PHA Programs Administered:

☒ **Public Housing and Section 8** ☐ **Section 8 Only** ☐ **Public Housing Only**

Number of public housing units: 168 Number of S8 units: Number of public housing units:
Number of S8 units: 320

☐ PHA Consortia: (check box if submitting a joint PHA Plan and complete table)

Participating PHAs	PHA Code	Program(s) Included in the Consortium	Programs Not in the Consortium	# of Units Each Program
Participating PHA 1:				
Participating PHA 2:				
Participating PHA 3:				

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 and attachments (if any) 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)

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)

Streamlined Five-Year PHA Plan

PHA FISCAL YEARS 2005 - 2009

[24 CFR Part 903.12]

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)

The Beverly Housing Authority (BHA) is committed to providing a full-range of safe, secure, suitable, and appropriate affordable housing opportunities to extremely low, very-low, low, and moderate-income family, elderly, and disabled households in a fair manner. The BHA is committed to assisting all residents who are moving from welfare-to-work with affordable housing opportunities that do not act as disincentives to economic advancement. The BHA is committed to deconcentrating poverty within its federal conventional public housing developments and attempting to provide and support wider access to affordable housing opportunities throughout the entire community. The BHA is committed to fair and non-discriminatory practices throughout all of its housing programs and activities.

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:
- ☒ Reduce public housing vacancies:
- ☒ 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) **91**
- ☒ Improve voucher management: (SEMAP score) **99**
- ☒ Increase customer satisfaction:
- ☒ Concentrate on efforts to improve specific management functions: (list; e.g., public housing finance; voucher unit inspections)
- ☒ Renovate or modernize public housing units:
- ☐ Demolish or dispose of obsolete public housing:
- ☐ Provide replacement public housing:
- ☒ Provide replacement vouchers:*****

  *** Especially if available in conjunction with the DHP.**
- ☐ Other: (list below)

☒ PHA Goal: Increase assisted housing choices
Objectives:
- ☒ Provide voucher mobility counseling: **(through briefings)**
- ☒ Conduct outreach efforts to potential voucher landlords
- ☒ Increase voucher payment standards*****
- ☐ 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)

  *** If necessary, increase voucher payment standards to 110% as required by rental market conditions in order to expand housing choices throughout the community.**

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:
- ☐ Implement measures to promote income mixing in public housing by assuring access for lower income families into higher income developments:
- ☒ Implement public housing security improvements:
- ☒ Designate developments or buildings for particular resident groups (elderly, persons with disabilities)—**DHP In-Process.**
- ☐ Other: (list below)

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:
- ☒ Provide or attract supportive services to improve assistance recipients' employability:
- ☒ Provide or attract supportive services to increase independence for the elderly or families with disabilities.
- ☐ 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:
- ☒ Undertake affirmative measures to provide a suitable living environment for families living in assisted housing, regardless of race, color, religion national origin, sex, familial status, and disability:
- ☒ Undertake affirmative measures to ensure accessible housing to persons with all varieties of disabilities regardless of unit size required:
- ☐ Other: (list below)

Other PHA Goals and Objectives: (list below)

Streamlined Annual PHA Plan
PHA Fiscal Year 2005
[24 CFR Part 903.12(b)]

Table of Contents
Provide the following table of contents for the streamlined Annual Plan submitted with the Five-Year Plan, including all streamlined plan components, and additional requirements, together with the list of supporting documents available for public inspection.

A. ANNUAL STREAMLINED PHA PLAN COMPONENTS

☒ 1. Housing Needs
☒ 2. Financial Resources
☒ 3. Policies on Eligibility, Selection and Admissions
☒ 4. Rent Determination Policies
☒ 5. Capital Improvements Needs
☒ 6. Demolition and Disposition
☒ 7. Homeownership
☒ 8. Civil Rights Certifications (included with PHA Certifications of Compliance)
☒ 9. Additional Information
  a. PHA Progress on Meeting 5-Year Mission and Goals
  b. Criteria for Substantial Deviations and Significant Amendments
  c. Other Information Requested by HUD
    i. Resident Advisory Board Membership and Consultation Process
    ii. Resident Membership on the PHA Governing Board
    iii. PHA Statement of Consistency with Consolidated Plan
    iv. (Reserved)
☒ 10. Project-Based Voucher Program
☒ 11. Supporting Documents Available for Review
☒ 12. FY 2005 Capital Fund Program and Capital Fund Program Replacement Housing Factor, Annual Statement/Performance and Evaluation Report
☒ 13. Capital Fund Program 5-Year Action Plan
☒ 14. Other (List below, providing name for each item)
Attachment 1: CFP P&E Report for FY 2002 (501-02)—file *MA044a01*
Attachment 2: CFP P&E Report for FY 2003 Grant 1 (501-03)—file *MA044a02*
Attachment 3: CFP P&E Report for FY 2003 Grant 2 (502-03)—file *MA044a03*
Attachment 4: CFP P&E Report for FY 2004 (501-04)—file *MA044a01*

B. SEPARATE HARD COPY SUBMISSIONS TO LOCAL HUD FIELD OFFICE

Form HUD-50077, *PHA Certifications of Compliance with the PHA Plans and Related Regulations*: *Board Resolution to Accompany the Standard Annual*, *Standard Five-Year*, *and Streamlined Five-Year/Annual Plans*;
Certification by State or Local Official of PHA Plan Consistency with Consolidated Plan.
For PHAs APPLYING FOR CAPITAL FUND PROGRAM (CFP) GRANTS:
Form HUD-50070, *Certification for a Drug-Free Workplace*;
Form HUD-50071, *Certification of Payments to Influence Federal Transactions*;
Form SF-LLL & SF-LLLa, *Disclosure of Lobbying Activities.*

Executive Summary (optional)

[903.7(r)]. If desired, provide a brief overview of the contents of the streamlined 5-Year/Annual Plan. **N/A**

1. Statement of Housing Needs [24 CFR Part 903.12 (b), 903.7(a)]

A. 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.

Housing Needs of Families on the PHA's Waiting Lists			
Waiting list type: (select one) ☒ **Section 8 tenant-based assistance** ☐ Public Housing ☐ Combined Section 8 and Public Housing ☐ 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	175	100%	2-5%
Extremely low income <=30% AMI	148	84.6%	
Very low income (>30% but <=50% AMI)	22	12.6%	
Low income (>50% but <80% AMI)	5	2.8%	
Families with children	94	53.7%	
Elderly families	17	9.7%	
Families with Disabilities	49	28.0%	
Other Families	15	8.6%	
Race/ethnicity-White	138	78.9%	
Race/ethnicity-Black	26	14.9%	
Race/ethnicity-Asian	7	4.0%	
Race/ethnicity-No Race Listed	4	2.2%	
Characteristics by Bedroom Size (Public Housing Only)	**N/A-Section 8**		
1BR			
2 BR			
3 BR			
4 BR			
5 BR			
5+ BR			

Housing Needs of Families on the PHA's Waiting Lists
Is the waiting list closed (select one)? ☐ No ☒ Yes If yes: How long has it been closed (# of months)? 48 months Does the PHA expect to reopen the list in the PHA Plan year? ☒ No ☐ Yes Does the PHA permit specific categories of families onto the waiting list, even if generally closed? ☒ No ☐ Yes

Housing Needs of Families on the PHA's Waiting Lists

Waiting list type: (select one)
☐ Section 8 tenant-based assistance
☒ **Public Housing—Elderly/Disabled MA 44-1 and MA 44-2—1 BRs**
☐ Combined Section 8 and Public Housing
☐ 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	93		21%
Extremely low income <=30% AMI	91	97.8%	
Very low income (>30% but <=50% AMI)	2	2.2%	
Low income (>50% but <80% AMI)	--		
Families with children	--		
Elderly families	18		
Families with Disabilities	60		
Other: Non-Elderly/Non-Disabled	15		
Race/ethnicity-White	84*		
Race/ethnicity-Black	9*		
Race/ethnicity-Hispanic	9*		
* Some applicants report more than one race/ethnicity.			
Characteristics by Bedroom Size (Public Housing Only)			
1BR	93	100.0%	
2 BR			
3 BR			
4 BR			
5 BR			
5+ BR			

Is the waiting list closed (select one)? ☒ No ☐ Yes
If yes:
How long has it been closed (# of months)?
Does the PHA expect to reopen the list in the PHA Plan year? ☐ No ☐ Yes
Does the PHA permit specific categories of families onto the waiting list, even if generally closed?
☐ No ☐ Yes

Housing Needs of Families on the PHA's Waiting Lists

Waiting list type: (select one)
☐ Section 8 tenant-based assistance
☒ **Public Housing—Family MA 44-2—2 BRs and 3 BRs**
☐ Combined Section 8 and Public Housing
☐ 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	509		
Extremely low income <=30% AMI	507	99.6%	
Very low income (>30% but <=50% AMI)	2	0.4%	
Low income (>50% but <80% AMI)	--		
Families with children	508	99.8%	
Elderly families	--		
Families with Disabilities	1	0.2%	
Race/ethnicity-White	360*		
Race/ethnicity-Black	131*		
Race/ethnicity-Asian	18*		
Race/ethnicity-Hispanic	209*		
* Some applicants report more than one race/ethnicity.			
Characteristics by Bedroom Size (Public Housing Only)			
1BR			
2 BR	321	63.1%	
3 BR	188	36.9%	
4 BR			
5 BR			
5+ BR			

Is the waiting list closed (select one)? ☐ No ☒ Yes
If yes:
How long has it been closed (# of months)? 2 (since 11/17/04)
Does the PHA expect to reopen the list in the PHA Plan year? ☒ No ☐ Yes
Does the PHA permit specific categories of families onto the waiting list, even if generally closed?
☒ No ☐ Yes

B. Strategy for Addressing Needs

Provide a brief description of the PHA's strategy for addressing the housing needs of families on the PHA's public housing and Section 8 waiting lists **IN THE UPCOMING YEAR**, and the Agency's reasons for choosing this strategy.

(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—**FLAT RENTS**
- ☐ Other: (list below)

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—**FLAT RENTS**
- ☐ 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—**DHP In-Process.**
- ☒ 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—**DHP In-Process.**
- ☒ 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—**Especially for DHP.**
- ☒ 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)
Promote Mobility

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 903.12 (b), 903.7 (c)]

List on the following table 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.

Financial Resources: Planned Sources and Uses		
Sources	**Planned $**	**Planned Uses**
1. **Federal Grants (FY 2005 grants) Estimated**		
a) Public Housing Operating Fund	$287,146	
b) Public Housing Capital Fund	$250,000 Estimated	
c) HOPE VI Revitalization	---	
d) HOPE VI Demolition	---	
e) Annual Contributions for Section 8 Tenant-Based Assistance	$3,215,000	
f) Resident Opportunity and Self-Sufficiency Grants	---	
g) Community Development Block Grant	---	
h) HOME	---	
Other Federal Grants (list below)	---	
2. Prior Year Federal Grants (unobligated funds only) (list below)	---	
3. Public Housing Dwelling Rental Income	$516,000	Operations
4. Other income (list below)		
Interest and Laundry Income	$12,000	Operations
Other income	---	
4. Non-federal sources (list below)	---	
Total resources	**$4,280,146**	

3. PHA Policies Governing Eligibility, Selection, and Admissions

[24 CFR Part 903.12 (b), 903.7 (b)]

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: **(within 10-20)**
☐ When families are within a certain time of being offered a unit: (state time)
☐ Other: (describe)

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)—**Credit Report, Personal 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)
The BHA maintains two (2) waiting lists—public housing and Section 8 tenant-based. The public housing waiting list is also organized by bedroom size.

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

☒ PHA main administrative office
☐ PHA development site management office
☐ Other (list below)

c. Site-Based Waiting Lists-Previous Year

1. Has the PHA operated one or more site-based waiting lists in the previous year? If yes, complete the following table; if not skip to d. **NO**

Site-Based Waiting Lists				
Development Information: (Name, number, location)	**Date Initiated**	**Initial mix of Racial, Ethnic or Disability Demographics**	**Current mix of Racial, Ethnic or Disability Demographics since Initiation of SBWL**	**Percent change between initial and current mix of Racial, Ethnic, or Disability demographics**

2. What is the number of site based waiting list developments to which families may apply at one time? ___

3. How many unit offers may an applicant turn down before being removed from the site-based waiting list? ___

4. ☐ Yes ☐ No: Is the PHA the subject of any pending fair housing complaint by HUD or any court order or settlement agreement? If yes, describe the order, agreement or complaint and describe how use of a site-based waiting list will not violate or be inconsistent with the order, agreement or complaint below:

d. Site-Based Waiting Lists – Coming Year

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? **NONE**

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?

Typically, most applicants are < 30% median income.

b. Transfer policies:

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

- ☒ Emergencies
- ☒ Over-housed
- ☒ Under-housed
- ☒ 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.

1 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)
☐ Working families and those unable to work because of age or disability
☐ Veterans and veterans' families
2 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)

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) **Resident Handbook and Other Policies**

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 on the following table:

Deconcentration Policy for Covered Developments			
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):
☐ 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)
That the applicant has been screened and found eligible under existing Section 8 requirements.

(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—**When Waiting List is open.**
☐ 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:

Request for extension in writing with proof of difficulty with housing search.

(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.

1 Date and Time

Former Federal preferences:
☐ Involuntary Displacement (Disaster, Government Action, Action of Housing Owner, Inaccessibility, Property Disposition)
2 Victims of domestic violence
☐ Substandard housing
☐ Homelessness
☐ High rent burden

Other preferences (select all that apply)
☐ Working families and those unable to work because of age or disability
☐ Veterans and veterans' families
3 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)

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)

Public Notices

4. PHA Rent Determination Policies

[24 CFR Part 903.12(b), 903.7(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 of the following two)

☒ 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))

☐ 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 (**$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**:**

c. Rents set at less than 30% of 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:
$135/week income from work exclusion for tenants 62 and older.
☐ 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)

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) N/A

☐ 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) N/A

☐ Market comparability study
☐ Fair market rents (FMR)
☐ 95th 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)

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

a. 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 below100% of FMR—**SROs and Studios**
☒ 100% of FMR—**1 BRs**
☒ Above 100% but at or below 110% of FMR—**2 BRs and greater**
☐ 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) N/A

☐ 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 **($50)**

b. ☐ Yes ☒ No: Has the PHA adopted any discretionary minimum rent hardship exemption policies? (if yes, list below)

5. Capital Improvement Needs

[24 CFR Part 903.12(b), 903.7 (g)]

Exemptions from Component 5: Section 8 only PHAs are not required to complete this component and may skip to Component 6.

A. Capital Fund Activities

Exemptions from sub-component 5A: PHAs that will not participate in the Capital Fund Program may skip to component 5B. All other PHAs must complete 5A as instructed.

(1) Capital Fund Program

a. ☒ Yes ☐ No Does the PHA plan to participate in the Capital Fund Program in the upcoming year? If yes, complete items 12 and 13 of this template (Capital Fund Program tables). If no, skip to B.

b. ☐ Yes ☒ No: Does the PHA propose to use any portion of its CFP funds to repay debt incurred to finance capital improvements? If so, the PHA must identify in its annual and 5-year capital plans the development(s) where such improvements will be made and show both how the proceeds of the financing will be used and the amount of the annual payments required to service the debt. (Note that separate HUD approval is required for such financing activities.).

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

Applicability of sub-component 5B: 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.

(1) Hope VI Revitalization--N/A

a. ☐ Yes ☒ No: Has the PHA received a HOPE VI revitalization grant? (if no, skip to next component; if yes, provide responses to questions on chart below 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)
Development name:
Development (project) number:
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

c. ☐ Yes ☒ No: Does the PHA plan to apply for a HOPE VI Revitalization grant in the Plan year? If yes, list development name/s below:

d. ☐ Yes ☒ No: 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:

e. ☐ Yes ☒ No: 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:

6. Demolition and Disposition –N/A

[24 CFR Part 903.12(b), 903.7 (h)]

Applicability of component 6: Section 8 only PHAs are not required to complete this section.

a. ☐ Yes ☒ No: Does the PHA plan to conduct any demolition or disposition activities (pursuant to section 18 or 24 (Hope VI)of the U.S. Housing Act of 1937 (42 U.S.C. 1437p) or Section 202/Section 33 (Mandatory Conversion) in the plan Fiscal Year? (If "No", skip to component 7; if "yes", complete one activity description for each development on the following chart.)

Demolition/Disposition Activity Description
1a. Development name: 1b. Development (project) number:
2. Activity type: Demolition ☐ Disposition ☐
3. Application status (select one) Approved ☐ Submitted, pending approval ☐ Planned application ☐
4. Date application approved, submitted, or planned for submission: (DD/MM/YY)
5. Number of units affected: 6. Coverage of action (select one) ☐ Part of the development ☐ Total development
7. Timeline for activity: a. Actual or projected start date of activity: b. Projected end date of activity:

7. Section 8 Tenant Based Assistance--Section 8(y) Homeownership Program

[24 CFR Part 903.12(b), 903.7(k)(1)(i)]

(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 the next component; if "yes", complete each program description below (copy and complete questions for each program identified.)

(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, what is the maximum number of participants this fiscal year?___

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:

c. What actions will the PHA undertake to implement the program this year (list)?

(3) Capacity of the PHA to Administer a Section 8 Homeownership Program

The PHA has demonstrated its capacity to administer the program by (select all that apply):
a. ☐ Establishing a minimum homeowner downpayment requirement of at least 3 percent of purchase price and requiring that at least 1 percent of the purchase price comes from the family's resources.
b. ☐ Requiring that financing for purchase of a home under its Section 8 homeownership will be provided, insured or guaranteed by the state or Federal government; comply with secondary mortgage market underwriting requirements; or comply with generally accepted private sector underwriting standards.
c. ☐ Partnering with a qualified agency or agencies to administer the program (list name(s) and years of experience below).
d. ☐ Demonstrating that it has other relevant experience (list experience below).

8. Civil Rights Certifications

[24 CFR Part 903.12 (b), 903.7 (o)]

Civil rights certifications are included in the *PHA Plan Certifications of Compliance with the PHA Plans and Related Regulations*: *Board Resolution to Accompany the Standard Annual, Standard Five-Year, and Streamlined Five-Year/Annual Plans*, which is submitted to the Field Office in hard copy—see Table of Contents.

9. Additional Information

[24 CFR Part 903.12 (b), 903.7 (r)]

A. PHA Progress in Meeting the Mission and Goals Described in the 5-Year Plan

(*Provide a statement of the PHA's progress against the goals and objectives established in the previous 5-Year Plan for the period FY 2000 - 2004.*

During the past five years (2000-2004), the Beverly Housing Authority has accomplished many of its goals and objectives, including but not limited to the following:

1. ***Revised its Tenant Selection and Assignment Plan and Admissions and Continued Occupancy Plan to conform with new requirements.***
2. ***Revised its Section 8 Administrative Plan to conform with new requirements.***
3. ***Adopted and implemented a Flat Rent option in lieu of income-based rents.***
4. ***Adopted and implemented a Community Service Policy.***
5. ***Adopted and implemented a Pet Policy.***
6. ***Adopted and implemented a income from work exclusion for the elderly.***
7. ***Implemented a Section 8 Project-Based Program to better serve the needs of disabled individuals.***
8. ***Continually engaged residents in the planning process for the Agency Plan.***
9. ***Completed a study on the needs of the elderly and disabled and initiated the process for filing a Designated Housing Plan with HUD.***
10. ***Completed many physical improvements, including security-related, to both the MA 44-1 and 44-2 developments.***

B. Criteria for Substantial Deviations and Significant Amendments

(1) Amendment and Deviation Definitions

24 CFR Part 903.7(r)

PHAs are required to define and adopt their own standards of substantial deviation from the 5-year Plan and Significant Amendment to the Annual Plan. The definition of significant amendment is important because it defines when the PHA will subject a change to the policies or activities described in the Annual Plan to full public hearing and HUD review before implementation.

a. Substantial Deviation from the 5-Year Plan
b. Significant Amendment or Modification to the Annual Plan

Significant Amendment or Substantial Deviation/Modification to the Plan

The Beverly Housing Authority (BHA) considers one or more of the following to be a *Significant Amendment* or *Substantial Deviation/Modification* to an already submitted Agency Plan:

1. Discretionary changes in rent determination or waiting list preferences.
2. A decision to undertake an Elderly/Disabled Designated Housing Plan (DHP).
3. A change in any open Annual Capital Fund Program (CFP) that modifies or changes the work items by greater than 20% of the total grant amount.
4. Establishment of new and/or substantively revised policies and procedures that have not previously been submitted as part of the current or previous years' Agency Plans.
5. Any major reduction in funding (≥ 20%) from HUD for the CFP.
6. Any other substantive activities undertaken that have a major affect on resident households (e.g., the conversion of public housing units to Section 8 vouchers).

In the case where there is a *Significant Amendment* or *Substantial Deviation/Modification* to an already submitted Agency Plan, the BHA will:

a. Consult with the Resident Advisory Board.
b. Review consistency of the change with the Consolidated Plan.
c. Allow a 45-day public review period of the amendments, modifications, and deviations.
d. After the public review period, conduct an open meeting for Board approval of the amendments, modifications, and deviations.
e. Resubmit the Agency Plan to HUD with the amendments, modifications, and deviations.

C. Other Information

[24 CFR Part 903.13, 903.15]

(1) Resident Advisory Board Recommendations

a. ☒ Yes ☐ No: Did the PHA receive any comments on the PHA Plan from the Resident Advisory Board/s?

If yes, provide the comments below: **The RAB would like the BHA to work with the City to see if the street lighting at the entrance to MA 44-1, Garden City Towers, can be improved.**

a. 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)* **The BHA agreed to work with the City to see if the street lighting at the entrance to MA 44-1, Garden City Towers, can be improved.**

(2) Resident Membership on PHA Governing Board

The governing board of each PHA is required to have at least one member who is directly assisted by the PHA, unless the PHA meets certain exemption criteria. Regulations governing the resident board member are found at 24 CFR Part 964, Subpart E.

a. Does the PHA governing board include at least one member who is directly assisted by the PHA this year?

☐ Yes ☒ No:* **The BHA is exempt. The BHA has less than 300 public housing units, has provided reasonable notice to the resident advisory board of the opportunity to serve on the governing board, and has not been notified by any resident of their interest to participate in the Board.**

If yes, complete the following:

Method of Selection:

☒ Appointment
The term of appointment is (include the date term expires):

☐ Election by Residents (if checked, complete next section--Description of Resident Election Process)

Description of Resident Election Process

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) **Appointed by Mayor.**

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)

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) **N/A—Appointed.**

b. If the PHA governing board does not have at least one member who is directly assisted by the PHA, why not? N/A

- ☐ The PHA is located in a State that requires the members of a governing board to be salaried and serve on a full time basis
- ☒ The PHA has less than 300 public housing units, has provided reasonable notice to the resident advisory board of the opportunity to serve on the governing board, and has not been notified by any resident of their interest to participate in the Board.
- ☐ Other (explain):

Date of next term expiration of a governing board member: **June 2008**

Name and title of appointing official(s) for governing board (indicate appointing official for the next available position): **William Scanlon, Mayor**

(3) PHA Statement of Consistency with the Consolidated Plan

[24 CFR Part 903.15]

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

Consolidated Plan jurisdiction: (provide name here)

North Shore HOME Consortium

a. 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 on its waiting list 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)
☐ Other: (list below)

b. The Consolidated Plan of the jurisdiction supports the PHA Plan with the following actions and commitments: (describe below)
The North Shore HOME Consortium provides the BHA with both local and regional demographic data on the housing needs of various groups of people. The North Shore HOME Consortium also provides funding to a variety of groups that supplement the BHA in its provision of affordable housing to a diverse population.

(4) (Reserved)

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

10. Project-Based Voucher Program

a. ☐ Yes ☒ No: Does the PHA plan to "project-base" any tenant-based Section 8 vouchers in the coming year? If yes, answer the following questions.—**The BHA has already reached its limit of 20% project-based vouchers.**

b. ☐ Yes ☐ No: Are there circumstances indicating that the project basing of the units, rather than tenant-basing of the same amount of assistance is an appropriate option?

If yes, check which circumstances apply:
☐ Low utilization rate for vouchers due to lack of suitable rental units
☐ Access to neighborhoods outside of high poverty areas
☐ Other (describe below:)

c. Indicate the number of units and general location of units (e.g. eligible census tracts or smaller areas within eligible census tracts):

11. List of Supporting Documents Available for Review for Streamlined Five-Year/ Annual PHA Plans

PHAs are to 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.

List of Supporting Documents Available for Review		
Applicable & On Display	**Supporting Document**	**Related Plan Component**
✓	*PHA Certifications of Compliance with the PHA Plans and Related Regulations and Board Resolution to Accompany the Standard Annual, Standard Five-Year, and Streamlined Five-Year/Annual Plans.*	Standard 5 Year and Annual Plans; streamlined 5 Year Plans
✓	State/Local Government Certification of Consistency with the Consolidated Plan.	5 Year Plans
✓	Fair Housing Documentation Supporting Fair Housing Certifications: 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
✓	Housing Needs Statement of the Consolidated Plan for the jurisdiction(s) in which the PHA is located and any additional backup data to support statement of housing needs for families on the PHA's public housing and Section 8 tenant-based waiting lists.	Annual Plan: Housing Needs
✓	Most recent board-approved operating budget for the public housing program	Annual Plan: Financial Resources
✓	Public Housing Admissions and (Continued) Occupancy Policy (A&O/ACOP), which includes the Tenant Selection and Assignment Plan [TSAP] and the Site-Based Waiting List Procedure.	Annual Plan: Eligibility, Selection, and Admissions Policies
N/A	Any policy governing occupancy of Police Officers and Over-Income Tenants in Public Housing. ☐ Check here if included in the public housing A&O Policy.	Annual Plan: Eligibility, Selection, and Admissions Policies
✓	Section 8 Administrative Plan	Annual Plan: Eligibility, Selection, and Admissions Policies
✓	Public housing rent determination policies, including the method for setting public housing flat rents. ☒ Check here if included in the public housing A & O Policy.	Annual Plan: Rent Determination
✓	Schedule of flat rents offered at each public housing development. ☒ Check here if included in the public housing A & O Policy.	Annual Plan: Rent Determination
✓	Section 8 rent determination (payment standard) policies (if included in plan, not necessary as a supporting document) and written analysis of Section 8 payment standard policies. ☒ Check here if included in Section 8 Administrative Plan.	Annual Plan: Rent Determination
✓	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
✓	Results of latest Public Housing Assessment System (PHAS) Assessment (or other applicable assessment).	Annual Plan: Management and Operations
✓	Follow-up Plan to Results of the PHAS Resident Satisfaction Survey (if necessary)	Annual Plan: Operations and Maintenance and Community Service & Self-Sufficiency
✓	Results of latest Section 8 Management Assessment System (SEMAP)	Annual Plan: Management and Operations
✓	Any policies governing any Section 8 special housing types	Annual Plan: Operations

List of Supporting Documents Available for Review		
Applicable & On Display	**Supporting Document**	**Related Plan Component**
	☒ check here if included in Section 8 Administrative Plan	and Maintenance
N/A	Consortium agreement(s).	Annual Plan: Agency Identification and Operations/ Management
✓	Public housing grievance procedures ☒ Check here if included in the public housing A & O Policy.	Annual Plan: Grievance Procedures
✓	Section 8 informal review and hearing procedures. ☒ Check here if included in Section 8 Administrative Plan.	Annual Plan: Grievance Procedures
✓	The Capital Fund/Comprehensive Grant Program Annual Statement /Performance and Evaluation Report for any active grant year.	Annual Plan: Capital Needs
N/A	Most recent CIAP Budget/Progress Report (HUD 52825) for any active CIAP grants.	Annual Plan: Capital Needs
N/A	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
✓	Self-evaluation, Needs Assessment and Transition Plan required by regulations implementing Section 504 of the Rehabilitation Act and the Americans with Disabilities Act. See PIH Notice 99-52 (HA).	Annual Plan: Capital Needs
N/A	Approved or submitted applications for demolition and/or disposition of public housing.	Annual Plan: Demolition and Disposition
✓ **In-Process**	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, Section 22 of the US Housing Act of 1937, or Section 33 of the US Housing Act of 1937.	Annual Plan: Conversion of Public Housing
N/A	Documentation for required Initial Assessment and any additional information required by HUD for Voluntary Conversion.	Annual Plan: Voluntary Conversion of Public Housing
N/A	Approved or submitted public housing homeownership programs/plans.	Annual Plan: Homeownership
N/A	Policies governing any Section 8 Homeownership program (Section _____of the Section 8 Administrative Plan)	Annual Plan: Homeownership
✓	Public Housing Community Service Policy/Programs ☒ Check here if included in Public Housing A & O Policy	Annual Plan: Community Service & Self-Sufficiency
N/A	Cooperative agreement between the PHA and the TANF agency and between the PHA and local employment and training service agencies.	Annual Plan: Community Service & Self-Sufficiency
N/A	FSS Action Plan(s) for public housing and/or Section 8.	Annual Plan: Community Service & Self-Sufficiency
✓	Section 3 documentation required by 24 CFR Part 135, Subpart E for public housing.	Annual Plan: Community Service & Self-Sufficiency
N/A	Most recent self-sufficiency (ED/SS, TOP or ROSS or other resident services grant) grant program reports for public housing.	Annual Plan: Community Service & Self-Sufficiency
✓	Policy on Ownership of Pets in Public Housing Family Developments (as required by regulation at 24 CFR Part 960, Subpart G). ☐ Check here if included in the public housing A & O Policy.	Pet Policy
✓	The results of the most recent fiscal year audit of the PHA conducted under the Single Audit Act as implemented by OMB Circular A-133, the results of that audit and the PHA's response to any findings.	Annual Plan: Annual Audit
N/A	Consortium agreement(s), if a consortium administers PHA programs.	Joint PHA Plan for Consortia

N/A	Consortia Joint PHA Plans ONLY: Certification that consortium agreement is in compliance with 24 CFR Part 943 pursuant to an opinion of counsel on file and available for inspection	Joint PHA Plan for Consortia
N/A	Other supporting documents (optional). List individually.	(Specify as needed)

12. Capital Fund Program and Capital Fund Program Replacement Housing Factor Annual Statement/Performance and Evaluation Report

Annual Statement/Performance and Evaluation Report
Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part I: Summary

PHA Name: **Beverly**	Grant Type and Number CFP Capital Fund Program Grant No: **MA06-P044-501-05** Replacement Housing Factor Grant No:	Federal FY of Grant: **2005**

☒ **Original Annual Statement** ☐ **Reserve for Disasters/ Emergencies** ☐ **Revised Annual Statement (revision no:)**
☐ **Performance and Evaluation Report for Period Ending:** ☐ **Final Performance and Evaluation Report**

Line	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
1	Total non-CFP Funds				
2	1406 Operations	$25,000			
3	1408 Management Improvements	$50,000			
4	1410 Administration	$25,000			
5	1411 Audit				
6	1415 Liquidated Damages				
7	1430 Fees and Costs				
8	1440 Site Acquisition				
9	1450 Site Improvement	$15,000			
10	1460 Dwelling Structures	$120,000			
11	1465.1 Dwelling Equipment—Nonexpendable				
12	1470 Nondwelling Structures				
13	1475 Nondwelling Equipment	$15,000			
14	1485 Demolition				
15	1490 Replacement Reserve				
16	1492 Moving to Work Demonstration				
17	1495.1 Relocation Costs				
18	1499 Development Activities				
19	1501 Collaterization or Debt Service				
20	1502 Contingency				
21	**Amount of Annual Grant: (sum of lines 2 – 20)**	**$250,000**			
22	Amount of line 21 Related to LBP Activities				
23	Amount of line 21 Related to Section 504 compliance				
24	Amount of line 21 Related to Security – Soft Costs				
25	Amount of Line 21 Related to Security – Hard Costs				
26	Amount of line 21 Related to Energy Conservation Measures				

12. Capital Fund Program and Capital Fund Program Replacement Housing Factor Annual Statement/Performance and Evaluation Report

Annual Statement/Performance and Evaluation Report
Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)
Part II: Supporting Pages

PHA Name: **BEVERLY**	**Grant Type and Number CFP** Capital Fund Program Grant No: **MA044-P044-501-05** Replacement Housing Factor Grant No:	**Federal FY of Grant: 2005**

Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
PHA-Wide	Operations	1406	Lump sum	25,000				
PHA-Wide	Management Improvements—Agency Plan, Policies and Procedures, Designated Housing Plan	1408	Lump sum est.-several contracts	50,000				
PHA-Wide	Administration	1410	Lump sum	25,000				
PHA-Wide	Upgrade Telephone System	1475	Estimate	15,000				
MA 44-1	New Appliances, Rangehoods	1460	Estimate	53,000				
MA 44-1	Flooring	1460	Estimate	12,000				
MA 44-1	Upgrade Keyless Entry System	1460	Estimate	10,000				
MA 44-1	Trash Compactor	1460	Estimate	10,000				
MA 44-1	Site Fencing	1450	Estimate	15,000				
MA 44-2	Lighting/Emergency Lighting	1460	Estimate	5,000				
MA 44-2	Mailbox Kiosk	1460	Estimate	10,000				
MA 44-2	Boiler Repairs/Hot Water Heaters	1460	Estimate	20,000				
TOTAL				**$250,000**				

12. Capital Fund Program and Capital Fund Program Replacement Housing Factor Annual Statement/Performance and Evaluation Report

Annual Statement/Performance and Evaluation Report
Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)
Part III: Implementation Schedule

PHA Name: **BEVERLY**	**Grant Type and Number CFP** Capital Fund Program No: **MA044-P044-501-05** Replacement Housing Factor No:	**Federal FY of Grant: 2005**

Development Number Name/HA-Wide Activities	All Fund Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)			Reasons for Revised Target Dates
	Original	Revised	Actual	Original	Revised	Actual	
PHA-Wide	9/16/07			9/16/09			
MA 44-1	9/16/07			9/16/09			
MA44-2	9/16/07			9/16/09			

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

PHA Name **BEVERLY**				☒**Original 5-Year Plan** ☐**Revision No:**	
Development Number/Name/HA-Wide	Year 1	Work Statement for Year 2 FFY Grant: 2006 PHA FY:2006	Work Statement for Year 3 FFY Grant: 2007 PHA FY: 2007	Work Statement for Year 4 FFY Grant:2008 PHA FY:2008	Work Statement for Year 5 FFY Grant:2009 PHA FY:2009
PHA-Wide--Operations	Annual Statement	$25,000	$25,000	$25,000	$25,000
PHA-Wide—Mngm't Improvemts.		$50,000	$50,000	$50,000	$50,000
PHA-Wide—Admin.		$25,000	$25,000	$25,000	$25,000
PHA-Wide--Security		$15,000	$15,000	$10,000	$10,000
MA 44-1		$40,000	$135,000	$140,000	---
MA 44-2		$95,000	---	---	---
PHA-Wide--Facilities		---	---	---	$140,000
CFP Funds Listed for 5-year planning		$250,000	$250,000	$250,000	$250,000
Replacement Housing Factor Funds					

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

Activities for Year 1	Activities for Year :2006 FFY Grant:2006 PHA FY:2006			Activities for Year: 2007 FFY Grant: 2007 PHA FY:2007		
	Development Name/Number	**Major Work Categories**	**Estimated Cost**	**Development Name/Number**	**Major Work Categories**	**Estimated Cost**
See	PHA-Wide	Operations	$25,000	PHA-Wide	Operations	$25,000
Annual	PHA-Wide	Mgm't Improvements—Agency Plan, Policies, Procedures, DHP, etc.	$50,000	PHA-Wide	Mgm't Improvements—Agency Plan, Policies, Procedures, DHP, etc.	$50,000
	PHA-Wide	Admin.	$25,000	PHA-Wide	Admin.	$25,000
	PHA-Wide	Security	$15,000	PHA-Wide	Security	$15,000
	MA 44-1	A&E for Windows	$40,000	MA 44-1	Window Replacement	$115,000
	MA 44-2	Stair Treads	$70,000	MA 44-1	Flooring, Painting	$20,000
	MA 44-2	Boilers, Hot Water Heater	$25,000			
Total CFP Estimated Cost			$250,000			$250,000

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

Activities for Year :2008 FFY Grant: 2008 PHA FY:2008			Activities for Year:2009 FFY Grant: 2009 PHA FY:2009		
Development Name/Number	**Major Work Categories**	**Estimated Cost**	**Development Name/Number**	**Major Work Categories**	**Estimated Cost**
PHA-Wide	Operations	$25,000	PHA-Wide	Operations	$25,000
PHA-Wide	Mgm't Improvements—Agency Plan, Policies, Procedures, DHP, etc.	$50,000	PHA-Wide	Mgm't Improvements—Agency Plan, Policies, Procedures, DHP, etc.	$50,000
PHA-Wide	Admin.	$25,000	PHA-Wide	Admin.	$25,000
PHA-Wide	Security	$10,000	PHA-Wide	Security	$10,000
MA 44-1	Window Replacement	$110,000	PHA-Wide	A&E for Maintenance Garage/Mod. Dept.	$20,000
MA 44-1	Painting	$30,000	PHA-Wide	Maintenance Garage/Mod. Dept.	$120,000
Total CFP Estimated Cost		$250,000			$250,000

Annual Statement/Performance and Evaluation Report

Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part 1: Summary

PHA Name Beverly, MA Housing Authority	**Grant Type and Number** Capital Fund Program Grant No: MA06-P044-501-02 Replacement Housing Factor Grant No:	**Federal FY of Grant:** 2002

[ ] **Original Annual Statement** [ ] **Reserve for Disasters/ Emergencies** [ ] **Revised Annual Statement (revision no: 2)**

[X] **Performance and Evaluation Report for Period Ending:** 9/30/2004 [ ] **Final Performance and Evaluation Report**

Line No.		Summary by Development Account	Total Estimated Cost		Total Actual Cost	
			Original	Revised	Obligated	Expended
1		Total non-CFP Funds	0.00	0.00	0.00	0.00
2		1406 Operations	27,287.00	27,287.00	27,287.00	27,287.00
3		1408 Management Improvements Soft Costs	54,574.00	51,775.00	51,775.00	51,775.00
4		1410 Administration	0.00	25,887.00	25,887.00	3,484.52
5		1411 Audit	0.00	0.00	0.00	0.00
6		1415 Liquidated Damages	0.00	0.00	0.00	0.00
7		1430 Fees and Costs	11,008.00	11,008.00	11,008.00	11,008.00
8		1440 Site Acquisition	0.00	0.00	0.00	0.00
9		1450 Site Improvement	0.00	0.00	0.00	0.00
10		1460 Dwelling Structures	90,000.00	142,920.00	142,920.00	118,582.80
11		1465.1 Dwelling Equipment—Nonexpendable	0.00	0.00	0.00	0.00
12		1470 Non-dwelling Structures	76,008.00	0.00	0.00	0.00
13		1475 Non-dwelling Equipment	0.00	0.00	0.00	0.00
14		1485 Demolition	0.00	0.00	0.00	0.00
15		1490 Replacement Reserve	0.00	0.00	0.00	0.00
16		1492 Moving to Work Demonstration	0.00	0.00	0.00	0.00
17		1495.1 Relocation Costs	0.00	0.00	0.00	0.00
18		1499 Development Activities	0.00	0.00	0.00	0.00
19		1501 Collateralization Expense Or Debt Service	0.00	0.00	0.00	0.00
20		1502 Contingency	0.00	0.00	0.00	0.00
21		Amount of Annual Grant: (sum of lines 2-20)	0.00	0.00	0.00	0.00
			258,877.00	258,877.00	258,877.00	212,137.32
22		Amount of line 21 Related to LBP Activities	0.00	0.00	0.00	0.00
23		Amount of line 21 Related to Section 504	0.00	0.00	0.00	0.00
		compliance	0.00	0.00	0.00	0.00
24		Amount of line 21 Related to Security –Soft Costs	0.00	0.00	0.00	0.00
25		Amount of Line 21 related to Security-- Hard Costs	258,877.00	258,877.00	258,877.00	212,137.32
26		Amount of line 21 Related to Energy Conservation	0.00	0.00	0.00	0.00
		Measures	0.00	0.00	0.00	0.00

HUD 50075
OMB Approval No: 2577-0226
Expires: 03/31/2002

Annual Statement/Performance and Evaluation Report
Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)

Part II: Supporting Pages

PHA Name: Beverly, MA Housing Authority		**Grant Type and Number** **Capital Fund Program Grant No: MA06-P044-501-02** **Replacement Housing Factor Grant No:**				**Federal FY of Grant: 2002** **9/30/2004**		
Development No. **Name/HA-Wide Activities**	**General Description of Major Work Categories**	**Dev Acct Number**	**Quantity**	**Total Estimated Cost**		**Total Actual Cost**		**Status of Work**
				Original	**Revised**	**Obligated**	**Expended**	
PHA-wide	Operations	1406		27,287.00	27,287.00	27,287.00	27,287.00	
PHA-wide	Management Improvements - agency plan, Computer* system upgrade, Security	1408		54,574.00	51,775.00	51,775.00	51,775.00	
	* The BHA has discussed this with HUD and							
	in the future, Computer Eqpm't will be							
	charged to Line Item 1475							
PHA-wide	Administration	1410			25,887.00	25,887.00	3,484.52	
PHA-wide	A & E Fees -501-04 BLI 1460 for	1430		11,008.00	11,008.00	11,008.00	11,008.00	
	MA 44-2 Int. and Ext. Painting-see below							
MA-44-1	Site Improvements	1450						
MA-44-2	Interior & Exterior Painting	1460		90,000.00	142,920.00	142,920.00	118,582.80	
MA-44-2	Exterior Painting	1470.1		76,008.00	0.00	0.00	0.00	
				258,877.00	258,877.00	258,877.00	212,137.32	

HUD 50075
OMB Approval No: 2577-0226
Expires: 03/31/2002

Annual Statement/Performance and Evaluation Report
Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)
Part III: Implementation Schedule

PHA Name: Beverly, MA Housing Authority	Grant Type and Number Capital Fund Program Grant No: MA06-P044-501-02 Replacement Housing Factor Grant No:	Federal FY of Grant: 2002

Development Number Name/HA-Wide Activities	All Fund Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)			Reasons for Revised Target Dates
	Original	Revised	Actual	Original	Revised	Actual	
PHA-wide	5/30/2004			5/30/2006			
MA-44-1	5/30/2004			5/30/2006			
MA-44-2	5/30/2004			5/30/2006			

HUD 50075
OMB Approval No: 2577-0226
Expires: 03/31/2002

Annual Statement/Performance and Evaluation Report

Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part 1: Summary

PHA Name	Grant Type and Number	Federal FY of Grant:
Beverly, MA Housing Authority	Capital Fund Program Grant No: MA06-P044-501-03 Replacement Housing Factor Grant No:	2003

[ ] Original Annual Statement [ ] Reserve for Disasters/ Emergencies [ ] Revised Annual Statement (revision no: 1)

[X] Performance and Evaluation Report for Period Ending: 9/30/2004 [ ] Final Performance and Evaluation Report

Line No.		Summary by Development Account	Total Estimated Cost		Total Actual Cost	
			Original	Revised	Obligated	Expended
1		Total non-CFP Funds	0.00	0.00	0.00	0.00
2		1406 Operations	21,300.00	21,300.00	21,300.00	21,300.00
3		1408 Management Improvements Soft Costs	13,400.00	13,400.00	13,400.00	13,400.00
		Management Improvements Hard Costs	0.00	0.00	0.00	0.00
4		1410 Administration	0.00	21,300.00	0.00	0.00
5		1411 Audit	0.00	0.00	0.00	0.00
6		1415 Liquidated Damages	0.00	0.00	0.00	0.00
7		1430 Fees and Costs	11,008.00	11,008.00	11,008.00	8,033.00
8		1440 Site Acquisition	0.00	0.00	0.00	0.00
9		1450 Site Improvement	42,292.00	0.00	0.00	0.00
10		1460 Dwelling Structures	125,000.00	145,992.00	430.00	0.00
11		1465.1 Dwelling Equipment—Nonexpendable	0.00	0.00	0.00	0.00
12		1470 Non-dwelling Structures	0.00	0.00	0.00	0.00
13		1475 Non-dwelling Equipment	0.00	0.00	0.00	0.00
14		1485 Demolition	0.00	0.00	0.00	0.00
15		1490 Replacement Reserve	0.00	0.00	0.00	0.00
16		1492 Moving to Work Demonstration	0.00	0.00	0.00	0.00
17		1495.1 Relocation Costs	0.00	0.00	0.00	0.00
18		1499 Development Activities	0.00	0.00	0.00	0.00
19		1501 Collateralization Expense Or Debt Service	0.00	0.00	0.00	0.00
20		1502 Contingency	0.00	0.00	0.00	0.00
21		Amount of Annual Grant: (sum of lines 2-20)	0.00	0.00	0.00	0.00
			213,000.00	213,000.00	46,138.00	42,733.00
22		Amount of line 21 Related to LBP Activities	0.00	0.00	0.00	0.00
23		Amount of line 21 Related to Section 504	0.00	0.00	0.00	0.00
		compliance	0.00	0.00	0.00	0.00
24		Amount of line 21 Related to Security –Soft Costs	0.00	0.00	0.00	0.00
25		Amount of Line 21 related to Security-- Hard Costs	213,000.00	213,000.00	46,138.00	42,733.00
26		Amount of line 21 Related to Energy Conservation	0.00	0.00	0.00	0.00
		Measures	0.00	0.00	0.00	0.00

HUD 50075
OMB Approval No: 2577-0226
Expires: 03/31/2002

Annual Statement/Performance and Evaluation Report
Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)

Part II: Supporting Pages

PHA Name: Beverly, MA Housing Authority		**Grant Type and Number** **Capital Fund Program Grant No: MA06-P044-501-03** **Replacement Housing Factor Grant No:**				**Federal FY of Grant: 2003** **9/30/2004**		
Development No. **Name/HA-Wide Activities**	**General Description of Major Work Categories**	**Dev Acct Number**	**Quantity**	**Total Estimated Cost**		**Total Actual Cost**		**Status of Work**
				Original	**Revised**	**Obligated**	**Expended**	
PHA-wide	Operations	1406		21,300.00	21,300.00	21,300.00	21,300.00	
PHA-wide	Management Improvement - Agency plan	1408		13,400.00	13,400.00	13,400.00	13,400.00	
PHA-wide	Administration	1410		0.00	21,300.00	0.00	0.00	
	Salary supplement, Acct, Advert, etc.							
PHA-wide	A & E Fees - 501-04 BLI 1460	1430		11,008.00	11,008.00	11,008.00	8,033.00	
	for MA 44-1 Heating System, etc., and							
	MA 44-2 Painting, etc.-see below							
MA-44-1	Heating System Upgrade, Air Handler	1460.1		125,000.00	40,000.00	0.00	0.00	
MA-44-2	Playground / Site Improvements at	1450.1		42,292.00	0.00	0.00	0.00	
	Hilltop Drive							
MA-44-2	Painting - continued from 510-02	1460.2			105,992.00	430.00	0.00	
				213,000.00	213,000.00	46,138.00	42,733.00	

HUD 50075
OMB Approval No: 2577-0226
Expires: 03/31/2002

Annual Statement/Performance and Evaluation Report
Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)
Part III: Implementation Schedule

PHA Name: Beverly, MA Housing Authority	Grant Type and Number Capital Fund Program Grant No: MA06-P044-501-03 Replacement Housing Factor Grant No:	Federal FY of Grant: 2003

Development Number Name/HA-Wide Activities	All Fund Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)			Reasons for Revised Target Dates
	Original	Revised	Actual	Original	Revised	Actual	
PHA-wide	9/16/2005			9/16/2007			
MA-44-1	9/16/2005	-	-	9/16/2007	-	-	
MA-44-2	9/16/2005			9/16/2007			

HUD 50075
OMB Approval No: 2577-0226
Expires: 03/31/2002

Annual Statement/Performance and Evaluation Report

Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part 1: Summary

PHA Name Beverly, MA Housing Authority	**Grant Type and Number** Capital Fund Program Grant No: MA06-P044-502-03 Replacement Housing Factor Grant No:	**Federal FY of Grant:** 2003

[ ] Original Annual Statement [ ] Reserve for Disasters/ Emergencies [ ] Revised Annual Statement (revision no: 1)

[X] Performance and Evaluation Report for Period Ending: 9/30/2004 **[ ] Final Performance and Evaluation Report**

Line No.		Summary by Development Account	Total Estimated Cost		Total Actual Cost	
			Original	Revised	Obligated	Expended
1		Total non-CFP Funds	0.00	0.00	0.00	0.00
2		1406 Operations	0.00	0.00	0.00	0.00
3		1408 Management Improvements Soft Costs	0.00	42,451.00	14,575.04	14,575.04
4		1410 Administration	0.00	0.00	0.00	0.00
5		1411 Audit	0.00	0.00	0.00	0.00
6		1415 Liquidated Damages	0.00	0.00	0.00	0.00
7		1430 Fees and Costs	0.00	0.00	0.00	0.00
8		1440 Site Acquisition	0.00	0.00	0.00	0.00
9		1450 Site Improvement	0.00	0.00	0.00	0.00
10		1460 Dwelling Structures	42,451.00	0.00	0.00	0.00
11		1465.1 Dwelling Equipment—Nonexpendable	0.00	0.00	0.00	0.00
12		1470 Non-dwelling Structures	0.00	0.00	0.00	0.00
13		1475 Non-dwelling Equipment	0.00	0.00	0.00	0.00
14		1485 Demolition	0.00	0.00	0.00	0.00
15		1490 Replacement Reserve	0.00	0.00	0.00	0.00
16		1492 Moving to Work Demonstration	0.00	0.00	0.00	0.00
17		1495.1 Relocation Costs	0.00	0.00	0.00	0.00
18		1499 Development Activities	0.00	0.00	0.00	0.00
19		1501 Collateralization Expense Or Debt Service	0.00	0.00	0.00	0.00
20		1502 Contingency	0.00	0.00	0.00	0.00
21		Amount of Annual Grant: (sum of lines 2-20)	0.00	0.00	0.00	0.00
			42,451.00	42,451.00	14,575.04	14,575.04
22		Amount of line 21 Related to LBP Activities	0.00	0.00	0.00	0.00
23		Amount of line 21 Related to Section 504	0.00	0.00	0.00	0.00
		compliance	0.00	0.00	0.00	0.00
24		Amount of line 21 Related to Security –Soft Costs	0.00	0.00	0.00	0.00
25		Amount of Line 21 related to Security-- Hard Costs	0.00	0.00	14,575.04	14,575.04
26		Amount of line 21 Related to Energy Conservation	0.00	0.00	0.00	0.00
		Measures	0.00	0.00	0.00	0.00

HUD 50075
OMB Approval No: 2577-0226
Expires: 03/31/2002

Annual Statement/Performance and Evaluation Report
Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)

Part II: Supporting Pages

PHA Name: Beverly, MA Housing Authority	**Grant Type and Number** **Capital Fund Program Grant No: MA06-P044-502-03** **Replacement Housing Factor Grant No:**	**Federal FY of Grant: 2003** **9/30/2004**

Development No. **Name/HA-Wide Activities**	**General Description of Major Work Categories**	**Dev Acct Number**	**Quantity**	**Total Estimated Cost**		**Total Actual Cost**		**Status of Work**
				Original	**Revised**	**Obligated**	**Expended**	
PHA-wide	Operations	1406						
PHA-wide	Management Improvements - Computer system upgrade, Security - carry forward	1408		0.00	42,451.00	14,575.04	14,575.04	
	from CPF 501-02							
PHA-wide	Administration	1410						
	A & E Fees	1430						
	Site Improvements	1450						
MA-44-2	Windows & Doors Replacement	1460		42,451.00	0.00	0.00	0.00	
	Non-dwelling Structures	1470						
	Non-dwelling Equipment	1475						
				42,451.00	42,451.00	14,575.04	14,575.04	

HUD 50075
OMB Approval No: 2577-0226
Expires: 03/31/2002

Annual Statement/Performance and Evaluation Report
Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)
Part III: Implementation Schedule

PHA Name: Beverly, MA Housing Authority	Grant Type and Number Capital Fund Program Grant No: MA06-P044-502-03 Replacement Housing Factor Grant No:	Federal FY of Grant: 2003

Development Number Name/HA-Wide	All Fund Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)			Reasons for Revised Target Dates
Activities	Original	Revised	Actual	Original	Revised	Actual	
PHA-wide	2/12/2006			2/12/2008			
MA-44-1	2/12/2006			2/12/2008			
MA-44-2	2/12/2006			2/12/2008			

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Annual Statement/Performance and Evaluation Report

Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part 1: Summary

PHA Name Beverly, MA Housing Authority	**Grant Type and Number** Capital Fund Program Grant No: MA06-P044-501-04 Replacement Housing Factor Grant No:	**Federal FY of Grant:** 2004

[ ] Original Annual Statement [ ] Reserve for Disasters/ Emergencies [ ] Revised Annual Statement (revision no: 1)

[X] Performance and Evaluation Report for Period Ending: 9/30/2004 **[ ] Final Performance and Evaluation Report**

Line No.		Summary by Development Account	Total Estimated Cost		Total Actual Cost	
			Original	Revised	Obligated	Expended
1		Total non-CFP Funds	0.00	0.00	0.00	0.00
2		1406 Operations	24,668.00	24,668.00	0.00	0.00
3		1408 Management Improvements Soft Costs	12,500.00	18,400.00	0.00	0.00
4		1410 Administration	24,668.00	24,668.00	0.00	0.00
5		1411 Audit	0.00	0.00	0.00	0.00
6		1415 Liquidated Damages	0.00	0.00	0.00	0.00
7		1430 Fees and Costs	10,000.00	15,000.00	0.00	0.00
8		1440 Site Acquisition	0.00	0.00	0.00	0.00
9		1450 Site Improvement	0.00	0.00	0.00	0.00
10		1460 Dwelling Structures	174,844.00	163,944.00	0.00	0.00
11		1465.1 Dwelling Equipment—Nonexpendable	0.00	0.00	0.00	0.00
12		1470 Non-dwelling Structures	0.00	0.00	0.00	0.00
13		1475 Non-dwelling Equipment	0.00	0.00	0.00	0.00
14		1485 Demolition	0.00	0.00	0.00	0.00
15		1490 Replacement Reserve	0.00	0.00	0.00	0.00
16		1492 Moving to Work Demonstration	0.00	0.00	0.00	0.00
17		1495.1 Relocation Costs	0.00	0.00	0.00	0.00
18		1499 Development Activities	0.00	0.00	0.00	0.00
19		1501 Collateralization Expense Or Debt Service	0.00	0.00	0.00	0.00
20		1502 Contingency	0.00	0.00	0.00	0.00
21		Amount of Annual Grant: (sum of lines 2-20)	0.00	0.00	0.00	0.00
			246,680.00	246,680.00	0.00	0.00
22		Amount of line 21 Related to LBP Activities	0.00	0.00	0.00	0.00
23		Amount of line 21 Related to Section 504	0.00	0.00	0.00	0.00
		compliance	0.00	0.00	0.00	0.00
24		Amount of line 21 Related to Security –Soft Costs	0.00	0.00	0.00	0.00
25		Amount of Line 21 related to Security-- Hard Costs	0.00	0.00	0.00	0.00
26		Amount of line 21 Related to Energy Conservation	0.00	0.00	0.00	0.00
		Measures	0.00	0.00	0.00	0.00

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Annual Statement/Performance and Evaluation Report
Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)

Part II: Supporting Pages

PHA Name: Beverly, MA Housing Authority		**Grant Type and Number** **Capital Fund Program Grant No: MA06-P044-501-04** **Replacement Housing Factor Grant No:**				**Federal FY of Grant: 2004** **9/30/2004**		
Development No. **Name/HA-Wide Activities**	**General Description of Major Work Categories**	**Dev Acct Number**	**Quantity**	**Total Estimated Cost**		**Total Actual Cost**		**Status of Work**
				Original	**Revised**	**Obligated**	**Expended**	
PHA-wide	Operations	1406		24,668.00	24,668.00			
PHA-wide	Management Improvements - Agency Plan and DHP TA	1408		12,500.00	18,400.00			
PHA-wide	Administration	1410		24,668.00	24,668.00			
	A & E Fees - related to 1460 below	1430		10,000.00	15,000.00			
	for MA 44-2 Work Items							
	Site Improvements	1450						
MA-44-2	New Bathrooms, New Windows/Doors, Stair Treads, Lighting and Security Systems	1460		174,844.00	163,944.00			
	Non-dwelling Structures	1470						
	Non-dwelling Equipment	1475						
				246,680.00	246,680.00	0.00	0.00	

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Annual Statement/Performance and Evaluation Report
Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)
Part III: Implementation Schedule

PHA Name: Beverly, MA Housing Authority	Grant Type and Number Capital Fund Program Grant No: MA06-P044-501-04 Replacement Housing Factor Grant No:	Federal FY of Grant: 2004

Development Number Name/HA-Wide Activities	All Fund Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)			Reasons for Revised Target Dates
	Original	Revised	Actual	Original	Revised	Actual	
PHA-wide	9/13/2006			9/13/2008			
MA-44-1	9/13/2006			9/13/2008			
MA-44-2	9/13/2006			9/13/2008			

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