

**CITY OF NEW BERN
BOARD OF ALDERMEN MEETING
JUNE 25, 2024 – 6:00 P.M.
CITY HALL COURTROOM
300 POLLOCK STREET**

1. Meeting opened by Mayor Odham. Prayer Coordinated by Alderman Prill. Pledge of Allegiance.
2. Roll Call.
3. Approve Agenda.

Consent Agenda

4. Consider Adopting a Resolution Closing Specific Streets for MumFest.
5. Consider Adopting a Resolution Closing Specific Streets for MumFeast 2024.

6. Conduct a Public Hearing and Consider Adopting:
 - a) an Ordinance to Establish the Rates for Consumption of Electricity Effective July 1, 2024;
 - b) an Ordinance for a Power Cost Adjustment Rider Applicable to the Electric Rate Ordinance for Consumption of Electricity Effective July 1, 2024; and
 - c) an Ordinance for a Revenue Reconciliation Adjustment Rider Applicable to the Electric Rate Ordinance for Consumption of Electricity Effective July 1, 2024.
7. Conduct a Public Hearing on the 2024 CDBG Annual Action Plan, Five-Year Consolidated Plan, and Analysis of Impediments to Fair Housing Choice.
8. Consider Adopting an Ordinance Amending the 2017 Roadway Improvements Project Fund.
9. Consider Adopting the Final Budget Ordinance for Fiscal Year 2023-24.
10. Appointment(s).
11. Attorney's Report.
12. City Manager's Report.
13. New Business.
14. Closed Session.
15. Adjourn.



NEW BERN
CITY OF NEW BERN

300 Pollock Street, P.O. Box 1129
New Bern, NC 28563-1129
(252) 636-4000

Aldermen

Rick Prill
Hazel B. Royal
Robert V. Aster
Johnnie Ray Kinsey
Barbara J. Best
Robert Brinson, Jr.

Jeffrey T. Odham
Mayor
Foster Hughes
City Manager
Brenda E. Blanco
City Clerk
Kimberly A Ostrom
Director of Finance

Memo to: Mayor and Board of Aldermen
From: Foster Hughes, City Manager
Date: June 21, 2024
Re: June 25, 2024 Agenda Explanations

- 1. Meeting opened by Mayor Jeffrey T. Odham. Prayer Coordinated by Alderman Prill. Pledge of Allegiance.**
- 2. Roll Call.**
- 3. Approve Agenda.**

Consent Agenda

- 4. Consider Adopting a Resolution Closing Specific Streets for MumFest.**

(Ward 1) Karen Sullivan, Executive Director of Swiss Bear Downtown Development Corp., has requested several street closures to accommodate the 2024 MumFest event slated for October 12-13, 2024. The streets to be closed from 5 p.m. on October 11th until 11 p.m. on October 13th are the 200-400 blocks of Broad Street, 200-300 blocks of East Front Street, 200-300 blocks of Middle Street, 200-300 blocks of Craven Street, and the 300-400 blocks of Pollock Street. In addition, she has requested the 200 blocks of Craven and Pollock Streets have restricted vehicular access from 6 a.m. on October 12th until 7 p.m. on October 13th. Swiss Bear is also requesting use of the city-owned parking lot on the corner of Craven and Pollock Streets from 5 p.m. on October 11th until 11 p.m. on October 13th. A memo from Kari Warren, Director of Parks and Registration, is attached along with the event application and a map of the affected areas.

- 5. Consider Adopting a Resolution Closing Specific Streets for MumFeast 2024.**

(Ward 1) Karen Sullivan has also requested the 200-300 blocks of Middle Street and the 300-400 blocks of Pollock Street be closed to vehicular traffic from 5 p.m. to 10 p.m. on September 27, 2024. A rain date of October 04, 2024 is requested.

A memo from Mrs. Warren is attached along with the event application and a map of the area.

6. Conduct a Public Hearing and Consider Adopting:

- a) **an Ordinance to Establish the Rates for Consumption of Electricity Effective July 1, 2024;**
- b) **an Ordinance for a Power Cost Adjustment Rider Applicable to the Electric Rate Ordinance for Consumption of Electricity Effective July 1, 2024; and**
- c) **an Ordinance for a Revenue Reconciliation Adjustment Rider Applicable to the Electric Rate Ordinance for Consumption of Electricity Effective July 1, 2024.**

A comprehensive project study was performed to provide insight on the financial health of New Bern's electric utility. The results were presented at the budget workshop on May 22, 2024. After discussion, the majority of the Board supported a three-year rate plan with 5% increases in Fiscal Years 2025-2027, which is inclusive of a power cost adjustment. After conducting a public hearing, the Board is to consider adopting ordinances making the rates effective July 01, 2024 and implementing power cost adjustment and revenue reconciliation adjustment riders. A memo from Charlie Bauschard, Director of Public Utilities, is attached along with additional backup and a PowerPoint that will be utilized to explain the changes.

7. Conduct a Public Hearing on the 2024 CDBG Annual Action Plan, Five-Year Consolidated Plan, and Analysis of Impediments to Fair Housing Choice.

The Department of Housing and Urban Development requires a public hearing be held before the adoption of an annual action plan or five-year consolidated plan associated with the Community Development Block Grant program. The FY24-28 consolidated plan will be carried out through annual action plans, which provide a summary of actions, activities and resources to be used each year to address priority needs and goals identified in the five-year plan. An analysis of impediments to fair housing choice focuses on six fundamental conditions within the local jurisdiction and must coincide with the five-year plan. The plans have been made available for inspection, and approval will be considered at the Board's July 23, 2024 meeting. No action is needed currently. A memo from D'Aja Fulmore, Community Development Coordinator, is attached along with a PowerPoint that she will present as an overview of the highlights and proposed projects.

8. Consider Adopting an Ordinance Amending the 2017 Roadway Improvements Project Fund.

This ordinance amends the 2017 Roadway Improvements Project Fund by \$245,058. Funds will be transferred from the General Fund to the project fund to cover two paving projects currently appropriated in the General Fund budget, specifically the Country Club Road and Walt Bellamy/Bern Street projects. A memo from Kim Ostrom, Director of Finance, is attached.

9. Consider Adopting the Final Budget Ordinance for Fiscal Year 2023-24.

A final budget ordinance is adopted annually to revise the current year's budget to ensure that all projected expenditures have sufficient budget and to realign the revenues to equal the appropriations. A memo from Mrs. Ostrom is attached.

10. Appointment(s).

- a) George "Eric" Jones has resigned from the Board of Adjustment due to scheduling conflicts. Alderman Kinsey is asked to make a new appointment to fill the remainder of Mr. Jones' term which expires on June 30, 2025.
- b) Several appointments will expire on June 30, 2024, as identified in the memo and schedule from the City Clerk. While some of the appointees are eligible for reappointment and desire to continue serving, others are ineligible to serve another consecutive term. The list has been updated to reflect appointments needed as of this date: Board of Adjustment, Bike and Pedestrian Advisory Committee, Historic Preservation Commission, and Planning and Zoning Board. It is requested appointments to the Community Development and Advisory Committee be withheld until that committee can be reviewed and possibly restructured.
- c) Chris Hoveland has resigned from the MSD Advisory Commission as representative for the restaurant category. A new appointment is needed to fill the remainder of his term that will expire on December 11, 2024.

11. Attorney's Report.

12. City Manager's Report.

13. New Business.

14. Closed Session.

15. Adjourn.

INDIVIDUALS WITH DISABILITIES REQUIRING SPECIAL ASSISTANCE SHOULD CALL
639-2931 NO LATER THAN 3 P.M. THE DATE OF THE MEETING

AGENDA ITEM COVER SHEET

Agenda Item Title:

Consider Adopting a Resolution to close specific streets to vehicular traffic as well as the use of City's property for the annual MUMFEST celebration.

Date of Meeting: June 25, 2024	Ward # if applicable: Ward 1
Department: Parks & Recreation	Person Submitting Item: Kari Warren Director of Parks & Recreation
Call for Public Hearing: <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	Date of Public Hearing: N/A

Explanation of Item:	<p>Karen Sullivan, Executive Director of Swiss Bear Downtown Development Corporation has made a request to:</p> <p>Close the following streets to vehicular traffic from 5:00pm on Friday, October 11, 2024, through 11:00pm on Sunday, October 13, 2024: 200-400 blocks of Broad Street, 200-300 blocks of East Front Street, 200-300 blocks of Middle Street, 200-300 blocks of Craven Street, and 300-400 blocks of Pollock Street.</p> <p>Provide limited access to the 200 block of Craven and 200 block of Pollock Streets from 6:00am on Saturday, October 12, 2024, until 7:00 p.m. on Sunday, October 13, 2024.</p> <p>The use of the City's parking lot on the corner of Craven and Pollock Streets from 5:00 p.m. on Friday, October 11, 2024, until 11:00 p.m. on Sunday, October 13, 2024.</p>
Actions Needed by Board:	Adopt the Resolution
Backup Attached:	Resolution – Memo – Map - Application
Is item time sensitive? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	

Cost of Agenda Item: N/A
If this requires an expenditure, has it been budgeted and are funds available and certified by the Finance Director? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No

Additional Notes: N/A



Aldermen

Rick Prill
Hazel B. Royal
Bobby Aster
Johnnie Ray Kinsey
Barbara J. Best
Robert Brinson, Jr.

Kari Warren, CPRP
Director of Parks & Recreation

Jeffrey T. Odham
Mayor
Foster Hughes
City Manager
Brenda E. Blanco
City Clerk
Kimberly A. Ostrom
Director of Finance



Date: June 7, 2024

Memo To: Mayor and Board of Aldermen

From: Kari Warren, CPRP *KW*
Director of Parks and Recreation

Re: Adopt a Resolution to close specific streets to vehicular traffic for the annual MUMFEST celebration

Background Information:

Karen Sullivan, Executive Director of Swiss Bear Downtown Development Corporation has made a request to:

- 1) Close the following streets to vehicular traffic from 5:00pm on Friday, October 11, 2024, through 11:00pm on Sunday, October 13, 2024: 200-400 blocks of Broad Street, 200-300 blocks of East Front Street, 200-300 blocks of Middle Street, 200-300 blocks of Craven Street, and 300-400 blocks of Pollock Street.
- 2) Provide limited access to the 200 block of Craven and 200 block of Pollock Streets from 6:00am on Saturday, October 12, 2024, until 7:00 p.m. on Sunday, October 13, 2024.
- 3) The use of the City's parking lot on the corner of Craven and Pollock Streets from 5:00 p.m. on Friday, October 11, 2024, until 11:00 p.m. on Sunday, October 13, 2024.

Recommendation:

The Director of Parks and Recreation recommends approval and requests the Board adopt a Resolution approving the request.

RESOLUTION

THAT WHEREAS, Swiss Bear Downtown Development Corporation is planning their annual MUMFEST and has requested the 200-400 blocks of Broad Street, 200-300 blocks of East Front Street, 200-300 blocks of Middle Street, 200-300 blocks of Craven Street, and 300-400 blocks of Pollock Street be closed to vehicular traffic from 5:00 p.m. on Friday, October 11, 2024, until 11:00 p.m. on Sunday, October 13, 2024; and

WHEREAS, Swiss Bear has also requested limited vehicular access to the 200 block of Craven Street and 200 block of Pollock Street from 6:00 a.m. on Saturday, October 12, 2024, until 7:00 p.m. on Sunday, October 13, 2024; and

WHEREAS, the use of the City's parking lot located on the corner of Craven and Pollock Streets from 5:00 p.m. on Friday, October 11, 2024, until 11:00 p.m. on Sunday, October 13, 2024; and

WHEREAS, the Director of Parks and Recreation of the City of New Bern recommends the above requests be approved.

NOW, THEREFORE, BE IT RESOLVED BY THE BOARD OF ALDERMEN OF THE CITY OF NEW BERN:

That the 200-400 blocks of Broad Street, 200-300 blocks of East Front Street, 200-300 blocks of Middle Street, 200-300 blocks of Craven Street, and the 300-400 blocks of Pollock Street be closed to vehicular traffic from 5:00 p.m. Friday, October 11, 2024, until 11:00 p.m. on Sunday, October 13, 2024, and

That limited vehicular access to the 200 block of Craven Street and 200 block of Pollock Street shall be from 6:00 a.m. on Saturday, October 12, 2024, until 7:00 p.m. on Sunday, October 13, 2024, for the 2024 MUMFEST event.

Further, use of the City's parking lot on the corner of Craven and Pollock Streets from 5:00 p.m. on Friday, October 11, 2024, until 11:00 p.m. on Sunday, October 13, 2024.

ADOPTED THIS 25th DAY of JUNE 2024.

JEFFREY T. ODHAM, MAYOR

BRENDA E. BLANCO, CITY CLERK

RECEIVED
MAY 30 P.M.
BY: AL

CITY OF NEW BERN

APPLICATION FOR PUBLIC ASSEMBLY, PARADE & SPECIAL EVENTS IN CITY PARKS

This application is hereby made for a permit to hold a Public Assembly and/or Parade as described in the City of New Bern Code of Ordinances (Sec. 66-85; 66-86; and 66-87) – Public Assemblies and Parades.

This application along with attachments must be presented at least 60 days prior to the event date.

- Festival** – A concert, fair, festival, exhibit, athletic event, promotion, community event, block party, or similar event.
- Parade** – A march, ceremony, pageant, procession or other similar activities consisting of persons, animals, vehicles or things, or any combination thereof, that disrupts the normal flow of traffic upon any public street.
- Public Assembly** – A festival or demonstration which is reasonably anticipated to obstruct the normal flow of traffic upon any public street and that is collected together in one place; or a festival in any city-controlled park.

Name of Event/Activity: MumFest 2024
Organization Name: Swiss Bear Inc.
Responsible Contact: Ann Marie Byrd, Events Director & Karen Sullivan, Executive Director
Address: 315 W. Front Street
City: New Bern State: NC Zip code: 28560
Phone: 252-571-5460 Ann Marie Alternate Phone: 919-427-1722 Karen
Email: events@swissbear.org

- Type of Event: Demonstration Festival Parade
- Date of Event: Oct 12-13, 2024 Proposed Rain Date: n/a
- Event Set up time: Oct 11, 5pm Event Tear Down Completed Time: Oct 13, 8pm
- Event Start Time: Oct 12, 10am Event End Time: Oct 13, 6pm
- Are you selling any goods or services? Yes* No
- Are you charging an admission fee or collecting donations? Yes* No

What is the specific location and/or route of the proposed event? (Attach additional information if needed)
See attached map. We are also requesting use of Bear Plaza and James Reed Lane, as well as Lawson Creek Park for parking and Shuttle buses.

Note: A detailed map of the proposed route as well as a specific list of streets is required. The specific location of the Public Assembly must include the aerial overview with location marked. *Festivals/Events require detailed aerial map with complete layout.*

What is the purpose of this event? Please be detailed in your description - (Attach additional information if needed)
A community festival and celebration designed to bring together our local community and encourage tourism.

This is a family friendly event for the public with about 200 vendors, entertainers and amusements. 2 beer gardens and 4 stages.

Estimated attendance: 100,000 pepole; Attendance not to exceed: n/a
**Note: if more than 1,000 in attendance is expected 1) Proof of Crowd Manager Training Certification is required. Training is available at the following link: http://www.newbernnc.gov/departments/fire_department/crowd_manager_training.php 2) Public Safety Plan is required. Information must be submitted with application. For additional info, please contact the Fire Marshall at 252-639-2931.*
Tents # TBD Sizes _____ Provide additional info as needed (Note: Tents 700 sq. ft. or bigger must be inspected by Fire Marshall.)

How will you handle trash generated from the event?

- We are requesting # _____ trash cans.
- We will provide our own bags & dispose of any trash generated ourselves.
 - We request that City Staff dispose of all trash generated. We understand additional fees will be charged for this service, including the cost of labor, and materials (bags, etc.) used.

Are you requesting any City of New Bern Street Closures? Yes* No

*Any street closures require approval of the Board of Aldermen. Street closures must be received **at least 60 days in advance** for consideration. Street closures require barricades. A fee of **\$5.00 per barricade** must be paid 48 business hours prior to the event.

*What Street(s) are you requesting to close? Be specific: _____
See attached map and narrative.

Are you requesting any State Road or Bridge closures? Yes* No

*If yes, a 90 day notice and application is required by the NCDOT for in order to consider state roads or bridges. For additional information, please call NCDOT Office at **252-439-2816**. The State Road/Bridge Closure permit must be attached to this application.

If this event includes the use of floats, vehicles, placards, loud speakers, or mechanical devices of any type, please provide a detailed explanation of their use, purpose and number. Speakers will be used on musical stages located next to City Hall, at Middle and Pollock, at the South end of Middle Street and S. Front, and in Union Point Park. 4 stages total.

Will Inflatables or other Play features be part of this event? Yes No (Additional Insurance may be required)

Will Food Vendors or Commercial/Non-Profit vendors be part of this event? Yes No

(If you answered YES, Additional Fees apply. A detailed list of all vendors is required.)

The following items are required and must be attached at the time of Application:

- A detailed map – including the location, route with beginning and ending point and street names included.
- Written Statement of how and when business's/residents affected are (were) informed of road closure.

The following items are required within **two (2) business days of the event or event shall be cancelled**:

- Certificate of Insurance from organizer & vendors – Listing the City of New Bern, PO Box 1129, New Bern, NC as "Additional Insured".
- List of all food/commercial/non-profit vendors.
- Payment in full of applicable fees and charges.

I attest that I am authorized on behalf of this group/organization to request the permit for the activities prescribed herein. I understand that this application must be submitted with full details and attachments. I understand that additional fees and charges may be incurred. Those charges include set-up tear down time for staff, rental of barricades, Public Safety, Trash collection, damages, etc. I further understand that failure to provide the requested information within the specified timelines shall result in application being denied. I agree to indemnify and hold harmless the City of New Bern, its departments, agents, employees, officials and volunteers for any injury, illness or damage to person or property during this activity.

The following items must be submitted with Application:

- Completed & Signed Application
- Detailed maps of parade route and/or festival (Event) layout
- Notification statement to residents/businesses (If road closure is requested)
- Proof of Crowd Manager training & Public Safety Plan (if attendance is 1,000 or more)

APB

5-17-24

Authorized Signature

Date

All documents have been provided and this application is recommended for approval

Administrative Support Supervisor

Date

This application has been approved.

Hari Warren
Director of Parks & Recreation

5-30-2024
Date

Total Anticipated Charges

Barricades: # _____
\$ _____

Trash Collection: \$ _____

City Staff: # _____
\$ _____

Vendor Fees # _____
\$ _____

Park/Facility Rental: \$ _____

Total Due: \$ _____

- Have HOA's been notified? Yes No Spoke with: _____
- Approved by Department Date: 5-30-24 Staff Initials: KW
- Submitted for Board Approval Date: _____ Staff Initials: _____
- All Paperwork collected Date: _____ Staff Initials: _____
- All fees collected \$ _____ Date: _____ Staff Initials: _____

City Sponsored Event

Yes No

MUMFEST 2024 APPLICATION ATTACHMENT

Street Closure Request for MumFest 2024:

Street Closures

5 pm Friday, Oct 11 – 11 pm Sunday, Oct 13

- 200-400 blocks of Broad St
- 200-300 blocks of East Front St
- 200-300 blocks of Middle St
- 200-300 block of Craven St
- 300-400 block of Pollock St

Limited Vehicular Access Request

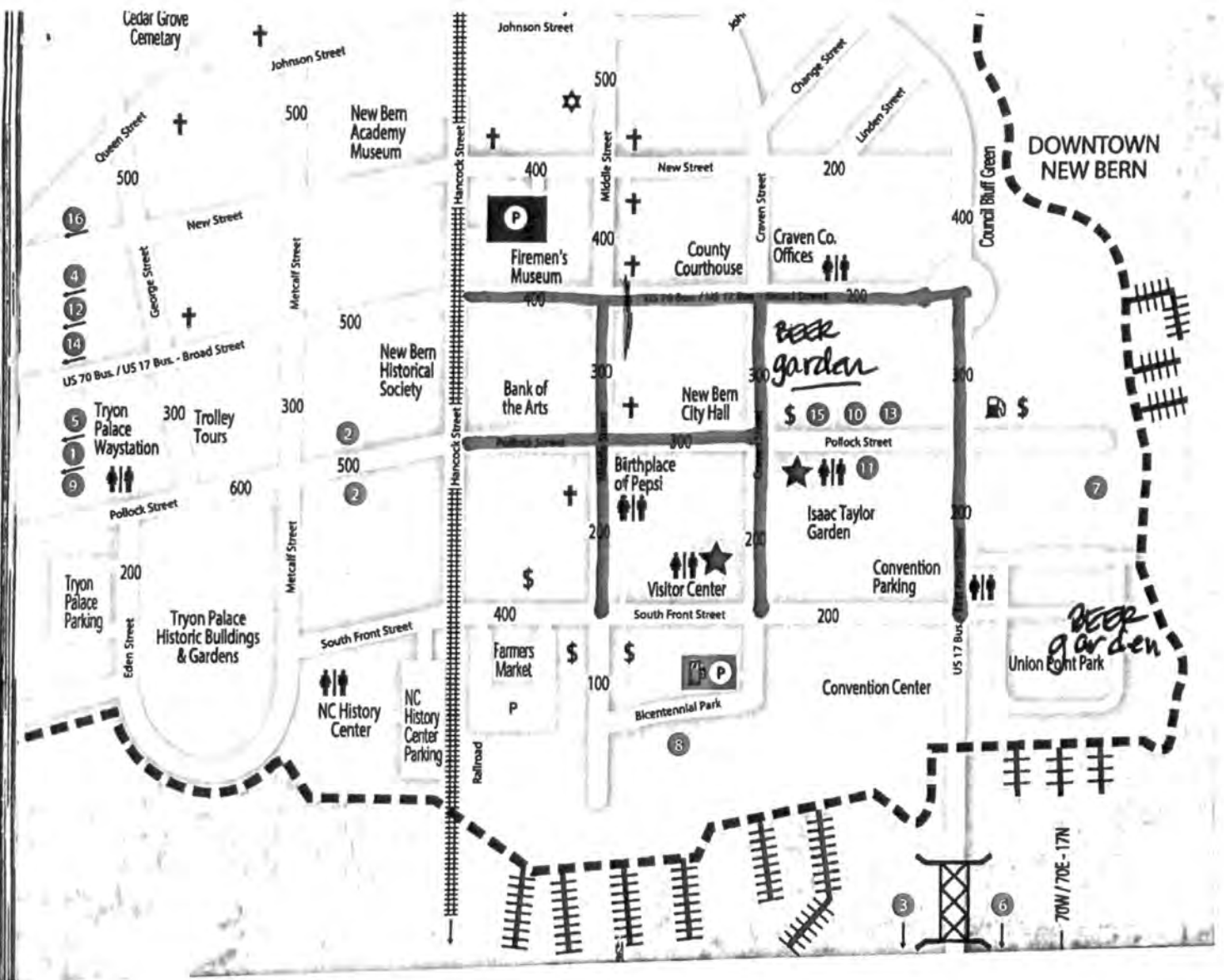
6 am, Saturday Oct 12 – 7 pm Sunday, Oct 13

- 200 block of Craven St
- 200 block of Pollock St

Businesses will be notified by Swiss Bear via email according to our current mailing list.

Residents will be notified by Swiss Bear of street closures via paper mailing.

* City Parking lot located on Craven/Pollock Streets
5pm Friday Oct 11 – 11pm Sunday Oct 13



MUM FEST

AGENDA ITEM COVER SHEET

Agenda Item Title:

Considering Adopting a Resolution to close specific streets to vehicular traffic for Swiss Bear Downtown Development Corporation MUMFEAST celebration.

Date of Meeting: June 25, 2024	Ward # if applicable: Ward 1
Department: Parks & Recreation	Person Submitting Item: Kari Warren, Director of Parks and Recreation
Call for Public Hearing: <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	Date of Public Hearing: N/A

Explanation of Item:	Swiss Bear Downtown Development Corporation has made a request to close the 200-300 blocks of Middle Street and the 300-400 blocks of Pollock Street to vehicular traffic on Friday, September 27, 2024, with a rain date of October 4, 2024, from 5:00 p.m. until 10:00 p.m. as well as the use of Bear Plaza and James Reed Lane for MUMFEAST celebration.
Actions Needed by Board:	Adopt the Resolution
Backup Attached:	Resolution – Memo – Map - Application
Is item time sensitive? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	

Cost of Agenda Item: N/A
If this requires an expenditure, has it been budgeted and are funds available and certified by the Finance Director? <input type="checkbox"/> Yes <input type="checkbox"/> No

Additional Notes: N/A



Aldermen

Rick Prill
Hazel B. Royal
Bobby Aster
Johnnie Ray Kinsey
Barbara J. Best
Robert Brinson, Jr.

Jeffrey T. Odham
Mayor
Foster Hughes
City Manager
Brenda E. Blanco
City Clerk
Kimberly A. Ostrom
Director of Finance

Kari Warren, CPRP
Director of Parks & Recreation



Date: June 7, 2024
Memo To: Mayor and Board of Aldermen
From: Kari Warren, CPRP *KW*
Director of Parks and Recreation
Re: Street Closure for Swiss Bear Downtown Development Corporation
MUMFEAST celebration

Background Information:

Swiss Bear Downtown Development Corporation has made a request to close the 200-300 blocks of Middle Street and the 300-400 blocks of Pollock Street to vehicular traffic on Friday, September 27, 2024, from 5:00 p.m. until 10:00 p.m. with a rain date of October 4, 2024, as well as the use of Bear Plaza and James Reed Lane for MUMFEAST celebration.

Recommendation:

The Parks and Recreation Department recommends approval and requests the Board adopt a Resolution approving the request.

If you have any questions concerning this matter, please let me know.

1307 Country Club Rd
New Bern, NC 28562
Office 252-639-2901
Fax 252-636-4138

RESOLUTION

THAT WHEREAS, Swiss Bear Downtown Development Corporation has scheduled its annual MUMFEAST celebration and has requested the 200-300 blocks of Middle Street, and the 300-400 blocks of Pollock Street be closed to vehicular traffic from 5:00 p.m. until 10:00 p.m. on Friday, September 27, 2024, with a rain date of Friday, October 4, 2024; and

WHEREAS, Swiss Bear has also requested the use of Bear Plaza and James Reed Lane, which the Director of Parks and Recreation has granted.

WHEREAS, the Director of Parks and Recreation of the City of New Bern recommends the above requests be approved.

NOW, THEREFORE, BE IT RESOLVED BY THE BOARD OF ALDERMEN OF THE CITY OF NEW BERN:

That the 200-300 blocks of Middle Street and the 300-400 blocks of Pollock Street be closed to vehicular traffic on September 27, 2024, from 5:00 p.m. until 10:00 p.m. with a rain date of October 4, 2024, for the MUMFEAST celebration.

The use of Bear Plaza and James Reed Lane as a part of the MUMFEAST celebration.

ADOPTED THIS 25th DAY of JUNE 2024.

JEFFREY T. ODHAM, MAYOR

BRENDA E. BLANCO, CITY CLERK

RECEIVED
MAY 30 P.M.
BY: CJ

Friday Sept 27

CITY OF NEW BERN

APPLICATION FOR PUBLIC ASSEMBLY, PARADE & SPECIAL EVENTS IN CITY PARKS

This application is hereby made for a permit to hold a Public Assembly and/or Parade as described in the City of New Bern Code of Ordinances (Sec. 66-85; 66-86; and 66-87) – Public Assemblies and Parades.

This application along with attachments must be presented at least **60 days prior** to the event date.

- Festival** – A concert, fair, festival, exhibit, athletic event, promotion, community event, block party, or similar event.
- Parade** – A march, ceremony, pageant, procession or other similar activities consisting of persons, animals, vehicles or things, or any combination thereof, that disrupts the normal flow of traffic upon any public street.
- Public Assembly** – A festival or demonstration which is reasonably anticipated to obstruct the normal flow of traffic upon any public street and that is collected together in one place; or a festival in any city-controlled park.

Name of Event/Activity: MumFEAST 2024

Organization Name: Swiss Bear Inc.

Responsible Contact: Ann Marie Byrd, Events Director & Karen Sullivan, Executive Director

Address: 316 S. Front St.

City: New Bern State: NC Zip code: 28560

Phone: 252-571-5460 Ann Marie Alternate Phone: 919-427-1722 Karen

Email: events@swissbear.org

- Type of Event: Demonstration Festival Parade
- Date of Event: Sept. 27, 2024 Proposed Rain Date: n/a Oct 4
- Event Set up time: Sept. 27, 5pm Event Tear Down Completed Time: Sept 27, 10pm
- Event Start Time: Sept. 27, 6pm Event End Time: Sept. 27, 9pm
- Are you selling any goods or services? Yes* No
- Are you charging an admission fee or collecting donations? Yes* No

Friday, Oct. 4

What is the specific location and/or route of the proposed event? (Attach additional information if needed)
See attached map. We are also requesting use of Bear Plaza and James Reed Lane.

Note: A detailed map of the proposed route as well as a specific list of streets is required. The specific location of the Public Assembly must include the aerial overview with location marked. **Festivals/Events require detailed aerial map with complete layout.**

What is the purpose of this event? Please be detailed in your description - (Attach additional information if needed)
A small community festival and celebration designed to bring together our local community and encourage tourism.
This is a family-friendly event for the public with food trucks, musical entertainers and possibly a beer garden.

Estimated attendance: 5,000; Attendance not to exceed: n/a

***Note: If more than 1,000 in attendance is expected 1) Proof of Crowd Manager Training Certification is required. Training is available at the following link: http://www.newbernnc.gov/departments/fire_department/crowd_manager_training.php 2) Public Safety Plan is required. Information must be submitted with application. For additional info, please contact the Fire Marshall at 252-639-2931.**

Tents # TBD Sizes _____ Provide additional info as needed (Note: Tents 700 sq. ft. or bigger must be inspected by Fire Marshall.)

How will you handle trash generated from the event?

- We are requesting # _____ trash cans.
- We will provide our own bags & dispose of any trash generated ourselves.
 - We request that City Staff dispose of all trash generated. We understand additional fees will be charged for this service, including the cost of labor, and materials (bags, etc.) used.

Are you requesting any City of New Bern Street Closures? Yes* No

*Any street closures require approval of the Board of Aldermen. Street closures must be received *at least 60 days in advance* for consideration. Street closures require barricades. A fee of \$5.00 per barricade must be paid 48 business hours prior to the event.

*What Street(s) are you requesting to close? Be specific: _____

See attached map and narrative.

Are you requesting any State Road or Bridge closures? Yes* No

*If yes, a 90 day notice and application is required by the NCDOT for in order to consider state roads or bridges. For additional information, please call NCDOT Office at 252-439-2816. The State Road/Bridge Closure permit must be attached to this application.

If this event includes the use of floats, vehicles, placards, loud speakers, or mechanical devices of any type, please provide a detailed explanation of their use, purpose and number. _____

A stage located at Middle and Pollock will use amplification for the bands performing at the event from approximately 6pm to 9pm.

Will Inflatables or other Play features be part of this event? Yes No (Additional insurance may be required)

Will Food Vendors or Commercial/Non-Profit vendors be part of this event? Yes No

(If you answered YES, Additional Fees apply. A detailed list of all vendors is required.)

The following items are required and must be attached at the time of Application:

- A detailed map – including the location, route with beginning and ending point and street names included.
- Written Statement of how and when business's/residents affected are (were) informed of road closure.

The following items are required within two (2) business days of the event or event shall be cancelled:

- Certificate of Insurance from organizer & vendors – Listing the City of New Bern, PO Box 1129, New Bern, NC as "Additional Insured".
- List of all food/commercial/non-profit vendors.
- Payment in full of applicable fees and charges.

I attest that I am authorized on behalf of this group/organization to request the permit for the activities prescribed herein. I understand that this application must be submitted with full details and attachments. I understand that additional fees and charges may be incurred. Those charges include set-up tear down time for staff, rental of barricades, Public Safety, Trash collection, damages, etc. I further understand that failure to provide the requested information within the specified timelines shall result in application being denied. I agree to indemnify and hold harmless the City of New Bern, its departments, agents, employees, officials and volunteers for any injury, illness or damage to person or property during this activity.

The following items must be submitted with Application:

- Completed & Signed Application
- Detailed maps of parade route and/or festival (Event) layout
- Notification statement to residents/businesses (if road closure is requested)
- Proof of Crowd Manager training & Public Safety Plan (if attendance is 1,000 or more)

Authorized Signature: AB Date: 5-17-24

All documents have been provided and this application is recommended for approval

Administrative Support Supervisor: _____ Date: _____

This application has been approved.

Thari Warren Date: 5-30-2024
Director of Parks & Recreation

Total Anticipated Charges	
Barricades:	# _____ \$ _____
Trash Collection:	\$ _____
City Staff:	# _____ \$ _____
Vendor Fees	# _____ \$ _____
Park/Facility Rental:	\$ _____
Total Due:	\$ _____

- Have HOA's been notified? Yes No Spoke with: _____
- Approved by Department Date: 5-30-24 Staff Initials: KW
- Submitted for Board Approval Date: _____ Staff Initials: _____
- All Paperwork collected Date: _____ Staff Initials: _____
- All fees collected \$ _____ Date: _____ Staff Initials: _____

City Sponsored Event
 Yes No

MUMFEAST 2024 APPLICATION ATTACHMENT

Street Closure Request for MumFEAST 2024:

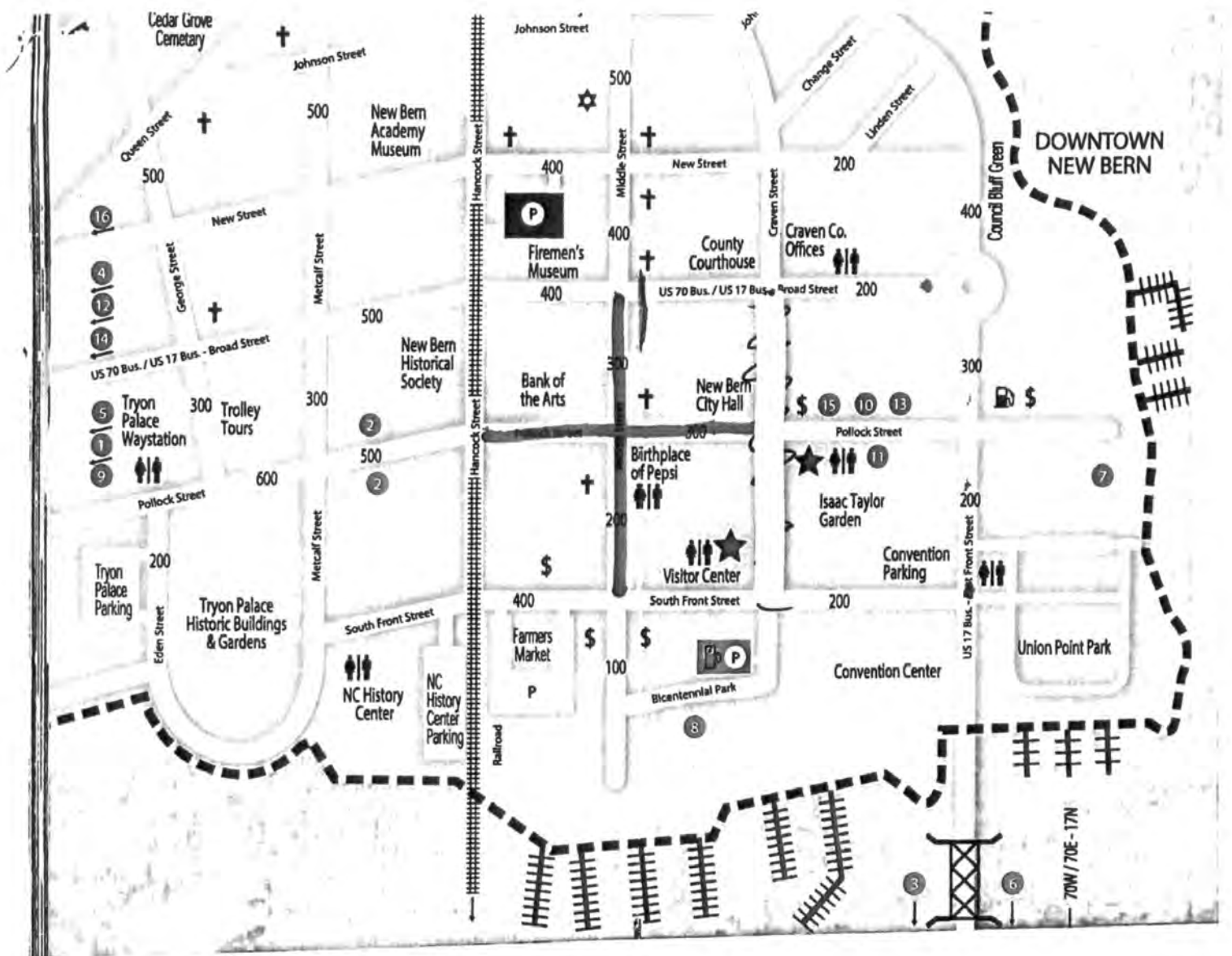
Street Closures

5 pm – 10 pm on Friday, September 27, 2024

- 200-300 blocks of Middle St
- 300-400 block of Pollock St

Businesses will be notified by Swiss Bear via email according to our current mailing list.

Residents will be notified by Swiss Bear of street closures via paper mailing.



MUM FEAST

AGENDA ITEM COVER SHEET



Agenda Item Title:

Conduct a Public Hearing and Consider Adopting Ordinances to Establish the Rates for Consumption of Electricity Effective July 1, 2024, a Power Cost Adjustment Rider, and Revenue Reconciliation Adjustment Rider.

Date of Meeting: 6/25/2024	Ward # if applicable:
Department: Public Utilities	Person Submitting Item: Charles Bauschard
Call for Public Hearing: <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	Date of Public Hearing:

Explanation of Item:	Recommendation to adopt electric rates effective July 1, 2024.
Actions Needed by Board:	Conduct public hearing vote on proposed unmetered electric rate.
Backup Attached:	Memo from Charles Bauschard. Fact Sheet. Red lined Ordinance. Executable Ordinance. Financial report. Directors workshop presentation. Financial workshop presentation. Rate design.
Is item time sensitive? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	

Cost of Agenda Item:
If this requires an expenditure, has it been budgeted and are funds available and certified by the Finance Director? <input type="checkbox"/> Yes <input type="checkbox"/> No

Additional Notes:



NEW BERN

CITY OF NEW BERN
DEPARTMENT OF PUBLIC UTILITIES
210 Kale Road, P.O. Box 1129
New Bern, NC 28563-1129

TO: Jeffrey Odham, Mayor; City of New Bern Board of Aldermen

FROM: Charles D. Bauschard, Director of Public Utilities

COPIES: Foster Hughes, City Manager; File

SUBJECT: Conduct Public Hearing and Consider Adopting an Ordinance to Establish the Rates for Consumption of Electricity Effective July 1, 2024.

DATE: June 17, 2024

Background

During the May 2023 Board of Alderman Budget Workshop, the Utility Director presented an electric fund financial projection study. The study identified areas of concern to include fund balance operating below minimum policy requirements and industry standards, declining cash reserves, increasing purchased power cost, overall expense requirements exceeding revenues and a 39 % remaining net book value for capitalized assets. These financial pressures are largely due to growing inflation, operating territory growth and an increase in overall operating expense requirements without supporting rate increases; coupled with proceeding rate decreases in 2015 (15%), 2016 (1.25%) and 2017 (1.5%). This indicates a need for a rate plan, and revenue increases to support cash requirements, as well as investing in system improvements for an aged electric system.

During the presentation, the Utility Director recommended a three (3) year rate plan and a monthly power cost adjustment charge (PCA). The rate plan includes an overall 5% rate increase in FY 2025, 26 and 27. As an alternative, the director recommended an overall 18% rate increase in FY 25 and a 4% rate increase in FY 27. By majority vote the BOA supported the three (3) year rate with a PCA.

Requested Action

Conducted a public and consider adopting an ordinance to establish rates for the consumption of electricity, effective July 1 2024.

**AN ORDINANCE TO AMEND AND RESTATE THE RATES FOR THE CONSUMPTION OF
ELECTRICITY APPLICABLE TO CUSTOMERS OF THE CITY OF NEW BERN**

BE IT ORDAINED BY THE BOARD OF ALDERMEN OF THE CITY OF NEW BERN:

SECTION 1. That there are hereby established rates for, the consumption of energy to be charged to electric utility customers of the City of New Bern effective **July 1, 2024**, summarized as follows:

Residential – Schedule 01	Rate		
<i>Effective Date</i>	7/1/2024	7/1/2025	7/1/2026
Customer Charge (per month)	\$12.00	\$14.00	\$16.00
Energy Charge (per kWh) First 300 kWh	\$0.1060	\$0.1105	\$0.1154
Energy Charge (per kWh) All additional kWh	\$0.1217	\$0.1262	\$0.1311
Three Phase Charge (in addition to Customer Charge, if applicable)	\$14.35	\$15.05	\$15.80

Residential – Schedule 07	Rate		
<i>Effective Date</i>	7/1/2024	7/1/2025	7/1/2026
Customer Charge (per month)	\$12.00	\$14.00	\$16.00
Energy Charge (per kWh) First 300 kWh	\$0.1007	\$0.1050	\$0.1096
Energy Charge (per kWh) All additional kWh	\$0.1156	\$0.1199	\$0.1245
Three Phase Charge (in addition to Customer Charge, if applicable)	\$14.35	\$15.05	\$15.80

Small General Service #1 – Schedule 03	Rate		
<i>Effective Date</i>	7/1/2024	7/1/2025	7/1/2026
Customer Charge (per month)	\$25.00	\$29.50	\$34.00
Energy Charge (per kWh) First 2325 kWh	\$0.1264	\$0.1268	\$0.1275
Energy Charge (per kWh) Next 1000 kWh	\$0.1010	\$0.1060	\$0.1120
Energy Charge (per kWh) All over 3325 kWh	\$0.0900	\$0.0920	\$0.0980
Three Phase Charge (in addition to Customer Charge, if applicable)	\$14.35	\$15.05	\$15.80

Small General Service #2 – Schedule 04	Rate		
<i>Effective Date</i>	7/1/2024	7/1/2025	7/1/2026
Customer Charge (per month)	\$25.00	\$29.50	\$34.00
Demand Charge (per kW)	\$3.00	\$3.75	\$4.50
Energy Charge (per kWh) First 2325 kWh	\$0.1030	\$0.1048	\$0.1069
Energy Charge (per kWh) Next 1000 kWh	\$0.0973	\$0.0991	\$0.1012
Energy Charge (per kWh) All over 3325 kWh	\$0.0904	\$0.0922	\$0.0943
Three Phase Charge (in addition to Customer Charge, if applicable)	\$14.35	\$15.05	\$15.80

Economic Development Rate #5	Rate		
<i>Effective Date</i>	7/1/2024	7/1/2025	7/1/2026
Customer Charge (per month)	\$205.00	\$215.00	\$225.00
Coincidental Peak Demand Charge (per kW)	\$27.00	\$27.75	\$28.50
Excess Demand Charge (per kW)	\$6.00	\$6.75	\$7.50
Energy Charge (per kWh)	\$0.0445	\$0.0480	\$0.0520

Large General Service #1 CP – Schedule 13	Rate			
	<i>Effective Date</i>	7/1/2024	7/1/2025	7/1/2026
Customer Charge (per month)		\$175.00	\$184.00	\$193.00
Coincidental Peak Demand Charge (per kW)		\$27.00	\$27.75	\$28.50
Excess Demand Charge (per kW)		\$6.00	\$6.75	\$7.50
Energy Charge (per kWh)		\$0.0568	\$0.0590	\$0.0614

Commercial Electric Vehicle Charging Station CP – Schedule 14	Rate			
	<i>Effective Date</i>	7/1/2024	7/1/2025	7/1/2026
Customer Charge (per month)		\$175.00	\$184.00	\$193.00
Coincidental Peak Demand Charge (per kW)		\$27.00	\$27.75	\$28.50
Excess Demand Charge (per kW)		\$6.00	\$6.75	\$7.50
Energy Charge (per kWh) Load Factor </-10%		\$0.1018	\$0.1040	\$0.1064
Energy Charge (per kWh) 10%< Load Factor <20%		\$0.0793	\$0.0815	\$0.0839
Energy Charge (per kWh) Load Factor >20%		\$0.0568	\$0.0590	\$0.0614

Utility Owned Electric Vehicle Charging Station – Schedule 15	Rate			
	<i>Effective Date</i>	7/1/2024	7/1/2025	7/1/2026
Active Energy Charge (per kWh) Load Factor <10%		\$0.7100	\$0.7500	\$0.7900
Active Energy Charge (per kWh) 10%< Load Factor <20%		\$0.4900	\$0.5100	\$0.5400
Active Energy Charge (per kWh) Load Factor >20%		\$0.4000	\$0.4200	\$0.4400
In Active Charging Charge (per minute)		\$0.1800	\$0.1900	\$0.2000

Medium General Service #1 – Schedule 08	Rate			
	<i>Effective Date</i>	7/1/2024	7/1/2025	7/1/2026
Customer Charge (per month)		\$27.00	\$31.50	\$36.00
Demand Charge (per kW)		\$9.00	\$9.75	\$10.50
Energy Charge (per kWh)		\$0.0863	\$0.0893	\$0.0926
Three Phase Charge (in addition to Customer Charge, if applicable)		\$14.35	\$15.05	\$15.80

Small Wholesale – Schedule 09	Rate			
	<i>Effective Date</i>	7/1/2024	7/1/2025	7/1/2026
Customer Charge (per month)		\$27.00	\$33.00	\$39.00
Demand Charge (per kW)		\$7.00	\$7.75	\$8.50
Energy Charge (per kWh)		\$0.0870	\$0.0856	\$0.0846
Three Phase Charge (in addition to Customer Charge, if applicable)		\$14.35	\$15.05	\$15.80

Large General Service #2 CP – Schedule 06	Rate			
	<i>Effective Date</i>	7/1/2024	7/1/2025	7/1/2026
Customer Charge (per month)		\$1,250.00	\$1,285.00	\$1,320.00
Coincidental Peak Demand Charge (per kW) First 3200 kW		\$27.00	\$27.75	\$28.50
Demand Charge (per kW) All Additional kW		\$27.00	\$27.75	\$28.50
Excess Demand Charge (per kW)		\$6.00	\$6.75	\$7.50
Energy Charge (per kWh) First 1,700,000 kWh		\$0.0529	\$0.0543	\$0.0564
Energy Charge (per kWh) All additional kWh		\$0.0445	\$0.0543	\$0.0564

Medium General Service #2 – Schedule 10	Rate		
<i>Effective Date</i>	7/1/2024	7/1/2025	7/1/2026
Customer Charge (per month)	\$27.00	\$31.50	\$36.00
Demand Charge (per kW)	\$9.75	\$10.50	\$11.25
Energy Charge (per kWh)	\$0.0829	\$0.0862	\$0.0898
Three Phase Charge (in addition to Customer Charge, if applicable)	\$14.35	\$15.05	\$15.80

Medium General Service TOU – Schedule 11	Rate		
<i>Effective Date</i>	7/1/2024	7/1/2025	7/1/2026
Customer Charge (per month)	\$60.00	\$63.00	\$66.00
On Peak Demand Charge (per kW)	\$27.00	\$27.75	\$28.50
Excess Demand Charge (per kW)	\$6.00	\$6.75	\$7.50
Energy Charge (per kWh)	\$0.0606	\$0.0630	\$0.0655

Medium General Service CP – Schedule 12	Rate		
<i>Effective Date</i>	7/1/2024	7/1/2025	7/1/2026
Customer Charge (per month)	\$90.00	\$97.50	\$105.00
Coincidental Peak Demand Charge (per kW)	\$27.00	\$27.75	\$28.50
Excess Demand Charge (per kW)	\$6.00	\$6.75	\$7.50
Energy Charge (per kWh)	\$0.0607	\$0.0630	\$0.0655

Residential – Schedule 40	Rate		
<i>Effective Date</i>	7/1/2024	7/1/2025	7/1/2026
Customer Charge (per month)	\$12.00	\$14.00	\$16.00
Energy Charge (per kWh) First 300 kWh	\$0.1060	\$0.1105	\$0.1154
Energy Charge (per kWh) 300 kWh to 800 kWh	\$0.1217	\$0.1262	\$0.1311
Energy Charge (per kWh) All additional kWh	\$0.1026	\$0.1044	\$0.1065
Three Phase Charge (in addition to customer charge, if applicable)	\$14.35	\$15.05	\$15.80

Residential – Schedule 50	Rate		
<i>Effective Date</i>	7/1/2024	7/1/2025	7/1/2026
Customer Charge (per month)	\$12.00	\$14.00	\$16.00
Energy Charge (per kWh) First 300 kWh	\$0.1007	\$0.1050	\$0.1096
Energy Charge (per kWh) 300 kWh to 800 kWh	\$0.1156	\$0.1199	\$0.1245
Energy Charge (per kWh) All additional kWh	\$0.0940	\$0.0936	\$0.0935
Three Phase Charge (in addition to customer charge, if applicable)	\$14.35	\$15.05	\$15.80

Extra Facilities Charge Generation – Schedule 70	Rate		
<i>Effective Date</i>	7/1/2024	7/1/2025	7/1/2026
Facilities Charge (per kW) based on Generator Nameplate Rating	\$2.96	\$2.96	\$2.96

Renewable Resource Facilities Credit – Schedule 60	Rate		
<i>Effective Date</i>	7/1/2024	7/1/2025	7/1/2026
Energy Credit (per kW generated)	\$0.0487	\$0.0487	\$0.0487

Commercial/Industrial Load Profiler Data Service – Schedule LPDS	Rate		
<i>Effective Date</i>	7/1/2024	7/1/2025	7/1/2026
Set Up Fee	\$157.50	\$165.40	\$173.65
Day After Data Service Charge (per month)	\$42.50	\$44.65	\$46.90
Same Day Hourly Data Service Charge (per month)	\$94.50	\$99.25	\$104.20

Unmetered Service – Schedule UMS	Rate		
<i>Effective Date</i>	7/1/2024	7/1/2025	7/1/2026
Customer Charge (per month)	\$25.00	\$29.50	\$34.00
Wattage Rating of 10w or less	\$.9500	\$.9900	\$1.04
Wattage Rating of 11w but not greater than 50w	\$2.00	\$2.10	\$2.20
Wattage Rating of 51w but not greater than 100w	\$3.99	\$4.19	\$4.40

Area Lighting – Schedule 04	Rate		
<i>Effective Date</i>	7/1/2024	7/1/2025	7/1/2026
Overhead Service			
<i>Mercury Vapor (Obsolete – Not available for new or replacement)</i>			
175 w semi enclosed (per month)	\$11.95	\$12.55	\$13.20
175w (per month)	\$13.95	\$14.65	\$15.40
1000w Flood (per month)	\$46.85	\$49.20	\$51.65
<i>Sodium Vapor (Obsolete – Not available for new or replacement)</i>			
100w (per month)	\$15.90	\$16.70	\$17.55
150w (per month)	\$19.70	\$20.70	\$21.75
250w Flood (per month)	\$22.40	\$23.50	\$24.70
400w Flood (per month)	\$34.80	\$36.55	\$38.40
<i>Metal Halide (Obsolete – Not available for new or replacement)</i>			
Cobra Head 500w (per month)	\$34.80	\$36.55	\$38.40
1000w Flood (per month)	\$46.85	\$49.20	\$51.65
<i>LED</i>			
50w (per month)	\$19.70	\$20.70	\$21.75
300w Flood (per month)	\$34.80	\$36.55	\$38.40
Underground Service			
<i>Area Lighting Poles</i>			
Wood per pole (per month)	\$3.10	\$3.25	\$3.40
Special Metal or Fiberglass per pole (per month)	\$7.30	\$7.65	\$8.05
<i>Underground Service</i>			
One Time Contribution	\$258.84	\$271.78	\$285.37
Increase per pole (per month)	\$5.15	\$5.40	\$5.65

Street Lighting Service – Schedule 32-A <i>Effective Date</i>	Rate		
	<i>7/1/2024</i>	<i>7/1/2025</i>	<i>7/1/2026</i>
<i>Mercury Vapor (Obsolete not available for new or replacement)</i>			
175w (per month)	\$8.85	\$9.30	\$9.75
<i>Metal Halide (Obsolete not available for new or replacement)</i>			
400w Flood (per month)	\$13.85	\$14.55	\$15.30
1000w Flood (per month)	\$15.20	\$15.95	\$16.75
<i>Sodium Vapor (Obsolete not available for new or replacement)</i>			
100w (per month)	\$8.20	\$8.60	\$9.05
150w (per month)	\$8.85	\$9.30	\$9.75
250w (per month)	\$11.30	\$11.85	\$12.45
400w (per month)	\$13.85	\$14.55	\$15.30
<i>LED</i>			
39w – Acorn (per month)	\$19.75	\$20.75	\$21.80
70w – Cobra (per month)	\$13.10	\$13.75	\$14.45
110w – Town & Country (per month)	\$18.50	\$19.45	\$20.40
160w – Gardco (per month)	\$40.80	\$42.85	\$33.35

Street Lighting Service – 32-B (Residential Subdivision)	Rate		
<i>Effective Date</i>	7/1/2024	7/1/2025	7/1/2026
Overhead Distribution Area			
Bracket mounted, enclosed luminaire on approved wood pole 1 light			
<i>Per 10 customers or major fraction thereof</i>			
7,000 lumen Mercury Vapor (per customer)	\$1.54	\$1.62	\$1.70
9,500 lumen Mercury Vapor (per customer)	\$1.54	\$1.62	\$1.70
<i>1 light per 5 customers or major fraction thereof</i>			
7,000 lumen Mercury Vapor (per customer)	\$3.09	\$3.24	\$3.40
9,500 lumen Sodium Vapor (per customer)	\$3.09	\$3.24	\$3.40
Underground Distribution Area			
Bracket mounted, enclosed luminaire on approved wood pole 1 light			
<i>Per 10 customers or major fraction thereof</i>			
7,000 lumen Mercury Vapor (per customer)	\$2.19	\$2.30	\$2.42
9,500 lumen Mercury Vapor (per customer)	\$2.19	\$2.30	\$2.42
<i>1 light per 5 customers or major fraction thereof</i>			
7,000 lumen Mercury Vapor (per customer)	\$4.40	\$4.60	\$4.85
9,500 lumen Mercury Vapor (per customer)	\$4.40	\$4.60	\$4.85
Bracket mounted, enclosed luminaries on standard metal pole			
<i>1 light per 10 customers or major fraction thereof</i>			
7,000 lumen Mercury Vapor (per customer)	\$2.50	\$2.60	\$2.75
9,500 lumen Sodium Vapor (per customer)	\$2.50	\$2.60	\$2.75
<i>1 light per 6 customers or major fraction thereof</i>			
7,000 lumen Mercury Vapor (per customer)	\$4.20	\$4.40	\$4.65
Approved post mounted type luminaries			
<i>1 light per 10 customers or major fraction thereof</i>			
7,000 lumen Mercury Vapor (per customer)	\$2.50	\$2.60	\$2.75
9,500 lumen Sodium Vapor (per customer)	\$2.50	\$2.60	\$2.75
<i>1 light per 6 customers or major fraction thereof</i>			
7,000 lumen Mercury Vapor (per customer)	\$4.20	\$4.40	\$4.65
9,500 lumen Sodium Vapor (per customer)	\$4.20	\$4.40	\$4.65

Street Lighting Service – Schedule 32-C	Rate		
<i>Effective Date</i>	7/1/2024	7/1/2025	7/1/2026
<i>Sodium Vapor</i>			
150w (per month)	\$8.85	\$9.30	\$9.75
400w (per month)	\$13.85	\$14.55	\$15.30
400w Flood (per month)	\$15.20	\$15.95	\$16.75
<i>Hight Pressure Sodium</i>			
250w (per month)	\$11.30	\$11.85	\$12.45

SECTION 2.

CITY OF NEW BERN
Residential Service #1
Schedule 01, Schedule 07

AVAILABILITY

Service under this schedule is available for separately metered and billed supply of alternating electric current to single family residences, including a residential farm where the farm uses are not taken through a separate meter.

This schedule is not available for (a) individual motors rated on 15HP; (b) commercial use as in hotels, public inns, motels, auto courts, tourist camps, and trailer camps; (c) separately metered accessory buildings or equipment on residential property not suitable for residential use; or (d) bulk barns and other seasonal high use facilities.

Non-fossil energy sources caused by acts of nature, such as wind or solar, are permitted as supplements to customer's energy requirements provided the City is granted the right to install, operate and monitor special equipment to measure the customer's load, or any part thereof, and to obtain any other data necessary to determine the operating characteristics and effects of the installation.

APPLICABILITY

The schedule is applicable to all electric service of the same available type supplied to the customer's premises at one point of delivery through a one kilowatt-hour meter in accordance with Schedule 01 and Schedule 07 below.

ADDITIONAL POINTS OF DELIVERY

Additional points of delivery installed on structures at same premises for other than residential dwelling purposes shall be billed under the appropriate rate schedule.

TYPE OF SERVICE

The type of service to which this schedule is applicable are alternating current, 60 hertz, either single-phase two or three wires, or three-phase four wires at City's standard voltages of 240 volts or less.

SCHEDULE 01

MONTHLY RATES

For Single-Phase Service

<i>Effective Date</i>	<u>7/1/2024</u>	<u>7/1/2025</u>	<u>7/1/2026</u>
Customer Charge	\$12.00	\$14.00	\$16.00
<i>Energy Charges</i>			
For all first 300 kWh	\$0.1060	\$0.1105	\$0.1154
For all additional kWh	\$0.1217	\$0.1262	\$0.1311

<i>For Three-Phase Service Effective Date</i>	<u>7/1/2024</u>	<u>7/1/2025</u>	<u>7/1/2026</u>
The bill computed for single phase service plus	\$14.35	\$15.05	\$15.80

SCHEDULE 07 (Energy Efficient Residential Rate)

ENERGY CONSERVATION DISCOUNT

Where customer notifies company and customer's dwelling complies with the thermal requirements herein, participates fully in the City of New Bern Load Management program, and operates no fossil fuel burning appliances for the purpose of heating or production of hot water, the Schedule E01 kWh charges will be discounted by 5% kWh.

MONTHLY RATES

For Single-Phase Service

<i>Effective Date</i>	<u>7/1/2024</u>	<u>7/1/2025</u>	<u>7/1/2026</u>
Customer Charge	\$12.00	\$14.00	\$16.00
<i>Energy Charges</i>			
For the first 300 kWh	\$0.1007	\$0.1050	\$0.1096
For all additional kWh	\$0.1156	\$0.1199	\$0.1245

For Three-Phase Service

<i>Effective Date</i>	<u>7/1/2024</u>	<u>7/1/2025</u>	<u>7/1/2026</u>
The bill computed for single phase service plus	\$14.35	\$15.05	\$15.80

THERMAL REQUIREMENTS CONVENTIONAL

HOUSING

In no case shall the structure's heat loss, including duct heat loss, be greater than 0.1 watts (.34 Btuh) per square foot of net heated floor area per degree Fahrenheit temperature difference. Generally, the criteria may be satisfied if the following provisions are met:

- A. Ceilings with an installed insulation thermal resistance value of R-30.
- B. Exterior walls with an installed insulation thermal resistance value of R-13.
- C. Floors over crawl spaces with an installed insulation thermal resistance value of R-19.
- D. All windows should be insulated double pane glass or single pane glass with storm windows.
- E. All exterior doors should be wood with storm doors or insulated metal doors.
- F. Adequate natural or mechanical attic ventilation should be provided.
- G. Effective with building permits issued 7/1/02, the dwelling is all electric (range-oven, heating, air conditioning, water heater, dryer).

MANUFACTURED HOUSING

In no case shall the structure's heat loss, including duct loss, be greater than .0125 watts (0.43 Btuh), per square foot of net heated floor area per degree Fahrenheit temperature difference.

Generally, these criteria may be satisfied if the following provisions are met:

- A. Ceilings with an installed insulation thermal resistance value of R-19
- B. Exterior walls with an insulation thermal resistance value of R-13.
- C. Floors over crawl spaces with an installed insulation thermal resistance value of R-19.
- D. All windows should be insulated double pane glass or single pane glass with storm windows.
- E. All exterior doors should be wood with storm doors or insulated metal doors.
- F. Effective with building permits issued 7/1/02, the dwelling is all electric (range-oven, heating, air conditioning, water heater, dryer).

A copy of the manufacturer's certificate stating that the manufactured home in question meets or exceeds the above thermal requirements shall be submitted to the City's Electric Utilities Department in order to obtain the 5% energy efficient discount.

PAYMENTS

Bills are due and payable no later than the due date reflected on the bill, which shall be no earlier than twenty (20) days from the date of the bill. If any bill is not so paid, the City has the right to suspend service in accordance with its service regulations.

SALES TAX

To the above charges will be added any applicable North Carolina sales tax.

CONTRACT PERIOD

The contract period shall not be less than one year.

GENERAL

Service rendered under this schedule is subject to the provisions of the City's service regulations, and any changes therein, substitutions therefore, or additions thereto lawfully made.

SECTION 3.

CITY OF NEW BERN Small General Service #1 Schedule 03

AVAILABILITY

This schedule is available for electric service at a single point of delivery, at one of the City's standard voltages, used by any non-residential customer with monthly energy readings of less than 2500 kWh for at least ten of the preceding twelve months. When the customer's monthly energy has equaled or exceeds 2500 kWh for at least three of the preceding twelve months, the City may install a demand meter to determine the maximum 15-minute demand and begin billing the customer for demand under Small General Service Schedule 04.

This schedule is not available: (1) for residential service; (2) for resale service; (3) Electric vehicle (EV) chargers; where EV chargers are the largest any time demand (kW) at the point of utility metering, or (4) whenever the monthly energy equals or exceeds 2500 kWh for at least three of the preceding twelve months. In order to

determine the applicable rate schedule for a customer, the City will review that customer's monthly readings once a year in one-year increments from the month that the customer first started receiving bills under a new schedule.

When the customer has installed generating or converting equipment that can operate in parallel with the City's service, the customer shall install the protective equipment acceptable to the City that will protect the City's employees, its other customers, and its distribution system. The City shall have the right to suspend delivery of electricity to the customer with such generating or converting equipment until the customer has installed the protective equipment.

APPLICABILITY

This schedule is applicable to all electric service of the same available type supplied to the customer's premises at one point of delivery through one meter.

MONTHLY RATES

For Single-Phase Service

<i>Effective Date</i>	<u>7/1/2024</u>	<u>7/1/2025</u>	<u>7/1/2026</u>
Customer Charge	\$25.00	\$29.50	\$34.00
<i>Energy Charges</i>			
First 2325 kWh	\$0.1264	\$0.1268	\$0.1275
Next 1000 kWh	\$0.1010	\$0.1060	\$0.1120
Over 3325 kWh	\$0.0900	\$0.0920	\$0.0980

For Three-Phase Service

<i>Effective Date</i>	<u>7/1/2024</u>	<u>7/1/2025</u>	<u>7/1/2026</u>
The bill computed for single phase service plus	\$14.35	\$15.05	\$15.80

DETERMINATION OF DEMAND

Any time demand shall be the highest 15-minute demand recorded during the current billing cycle.

SALES TAX

To the above charges will be added any applicable North Carolina sales tax.

PAYMENTS

Bills are due and payable no later than the due date reflected on the bill, which shall be no earlier than twenty (20) days from the date of the bill. If any bill is not so paid, the City has the right to suspend service in accordance with its service regulations.

CONTRACT PERIOD

The contract period shall not be less than one year, except for short term, construction, or temporary service, in which case the contract period may be for the period requested by the customer, provided the customer agrees:

1. That the service supplied shall be for a continuous period until discontinued, and
2. That where it is necessary for the City to extend lines, erect transformers, or do any work necessary to supply service, except for the installation of a self-contained meter, the customer shall pay for the lines extension in accordance with the City's customer service policies as may be amended from time to time.

GENERAL

Service rendered under this schedule is subject to the provisions of the City's service regulations, and any changes therein, substitutions therefore, or additions thereto lawfully made.

SECTION 4.

CITY OF NEW BERN Small General Service #2 Schedule 04

AVAILABILITY

This schedule is available for electric service at a single point of delivery, at one of the City's standard voltages, used by any non-residential customer with monthly energy readings of 2500 kWh or greater for at least three of the preceding twelve months but with demand reading of less than 35kWh for at least eleven of the preceding twelve months.

This schedule is not available; (1) for residential service; (2) for resale service; (3) Electric vehicle (EV) chargers; where EV chargers are the largest any time demand (kW) at the point of utility metering, or (4) whenever the monthly demand equals or exceeds 35kW for at least two of the preceding twelve months. In order to determine the applicable rate schedule for a customer, the City will review the customer's monthly readings once a year, in one-year increments from the month that the customer first started receiving bills under a new schedule.

When the customer has installed generating or converting equipment that can operate in parallel with the City's service, the customer shall install the protective equipment acceptable to the City that will protect the City's employees, its other customers, and its distribution system. The City shall have the right to suspend delivery of electricity to the customer with such generating or converting equipment until the customer has installed the protective equipment.

APPLICABILITY

This schedule is applicable to all electric service of the same available type supplied to the customer's premises at one point of delivery through one meter.

MONTHLY RATES

For Single-Phase Service

<i>Effective Date</i>	<u>7/1/2024</u>	<u>7/1/2025</u>	<u>7/1/2026</u>
Customer Charge	\$25.00	\$29.50	\$34.00
<i>Energy Charges</i>			
First 2325 kWh	\$0.1030	\$0.1048	\$0.1069
Next 1000 kWh	\$0.0973	\$0.0991	\$0.1012
All over 3325 kWh	\$0.0904	\$0.0922	\$0.0943
Demand Charge per kW	\$3.00	\$3.75	\$4.50

For Three-Phase Service

<i>Effective Date</i>	<u>7/1/2024</u>	<u>7/1/2025</u>	<u>7/1/2026</u>
The bill computed for single phase service plus	\$14.35	\$15.05	\$15.80

DETERMINATION OF DEMAND

The billing demand shall be the maximum kW registered or computed by or from the City's metering facilities during any 15-minute interval within the current billing cycle.

Any time demand shall be the highest 15-minute demand recorded during the current billing cycle.

SALES TAX

To the above charges will be added any applicable North Carolina sales tax.

PAYMENTS

Bills are due and payable no later than the due date reflected on the bill, which shall be no earlier than twenty (20) days from the date of the bill. If any bill is not so paid, the City has the right to suspend service in accordance with its service regulations.

CONTRACT PERIOD

The contract period shall not be less than one year, except for short-term, construction, or temporary service, in which case the contract period may be for the period requested by the customer, provided the customer agrees:

1. That the service supplied shall be for a continuous period until discontinued; and
2. That where it is necessary for the City to extend lines, erect transformers, or do any work necessary to supply service, except for the installation of a self-contained meter, the customer shall pay for the line extension in accordance with the City's customer service policies as may be amended from time to time.

GENERAL

Service rendered under this schedule is subject to the provisions of the City's service regulations, and any changes therein, substitutions therefore, or additions thereto lawfully made.

SECTION 5.

CITY OF NEW BERN
Economic Development CP Rate
Large General Service
Minimum Demand = 350 kW
Schedule EDR5

APPLICABILITY

The Economic Development (ED) Rate set forth in this schedule is available to new loads or load expansions of commercial or industrial customers which meet the following requirements:

1. Have at least a 350 kW annual peak demand;
2. In the case of new loads, have not been served by the City prior to the date on which service of such load under this ED rate commences, except as necessary to maintain a minimum level of service prior to full operation;

3. In the case of load expansions, are at least an incremental addition of 200 kW to the facility's highest Non-Coincidental Peak Demand for the previous twelve (12) months of service and are the result of adding new full-time employees to the organization of at least 100 persons;
4. Are individually metered;
5. Are served under the provision of a service agreement with the City; and
6. Are approved by the Board of Aldermen and the City Manager.

This schedule is not available for: (1) residential service; (2) breakdown, standby, or supplementary service unless used in conjunction with applicable standby or generation service rider for a continuous period of not less than one year; (3) resale service; (4) Electric vehicle (EV) chargers; where EV chargers are the largest any time demand (kW) at the point of utility metering.

CONTRACT PERIOD

Service under this rate is only available to new loads or load expansions for a period of five (5) years, following the date of full operation.

At the end of the customer's eligibility for this rate, the customer will then be switched to the appropriate standard rate schedule based on load size and characteristics.

MONTHLY RATES

<i>Effective Dates</i>	<u>7/1/2024</u>	<u>7/1/2025</u>	<u>7/1/2026</u>
Customer Charge	\$205.00	\$215.00	\$225.00
Energy Charge per kWh	\$0.0445	\$0.0480	\$0.0520
 <i>Demand Charges</i>			
Coincidental Peak Demand per kW	\$27.00	\$27.75	\$28.50
Excess Demand per kW	\$6.00	\$6.75	\$7.50

The minimum charge shall be such as may be contracted for, but not less than the sum of the charges in A, B, C and D above.

DETERMINATION OF DEMAND

Coincident Peak (CP) Demand: The Coincident Peak (CP) Demand shall be the customer's contribution to the City's 60-minute interval which is used by the North Carolina Eastern Municipal Power Agency (NCEMPA) for wholesale billing purposes during the current calendar month.

Excess Demand: Excess Demand shall be the difference between the maximum 15-minute demand recorded during the current billing cycle and the Coincident Peak (CP) Demand for the same billing cycle.

Any Time Demand: Any Time Demand shall be the highest 15-minute demand recorded during the current billing cycle.

kWh: The letters kWh of energy consumption shall be the total usage of electricity during the current billing cycle.

NOTIFICATION BY THE CITY

The City will use diligent effort to predict each monthly system peak and notify the customer in advance; however, the City is not able to guarantee an accurate prediction, and notice will be provided. Notification by the City will be provided to the customer by the direct telephone communications or automatic signal, as mutually agreed. The customer will hold the City harmless in connection with its response to notification.

SALES TAX

To the above charges will be added any applicable North Carolina sales tax.

PAYMENTS

Bills are due and payable no later than the due date reflected on the bill, which shall be no earlier than twenty (20) days from the date of the bill. If any bill is not so paid, the City has the right to suspend service in accordance with its service regulations.

GENERAL

Service rendered under this schedule is subject to the provisions of the City’s service regulations, and any changes therein, substitutions therefore, or additions thereto lawfully made.

SECTION 6.

**CITY OF NEW BERN
Large General Service #1 – CP
Schedule 13**

AVAILABILITY

This schedule is available for electric service at a single point of delivery at one of the City’s standard voltages, used by any non-residential customer with a monthly demand between 750 kWh and 2,000 kW for at least two of the preceding twelve months.

This schedule is not available for (1) residential service; (2) breakdown, standby, or supplementary service unless used in conjunction with applicable standby or generation service rider for a continuous period of not less than one year; (3) resale service; (4) Electric vehicle (EV) chargers; where EV chargers are the largest any time demand (kW) at the point of utility metering or (5) whenever the monthly demand exceeds 100,000 kW. In order to determine the applicable rate schedule for a customer, the City will review that customer’s monthly readings once a year, in one-year increments from the month that the customer first starter receiving bills under a new schedule.

MONTHLY RATES

<i>Effective Date</i>	<u>7/1/2024</u>	<u>7/1/2025</u>	<u>7/1/2026</u>
Customer Charge	\$175.00	\$184.00	\$193.00
Energy Charge per kWh	\$0.0568	\$0.0590	\$0.0614
<i>Demand Charges</i>			
Coincidental Peak Demand per kW	\$27.00	\$27.75	\$28.50
Excess Demand per kW	\$6.00	\$6.75	\$7.50

DETERMINATION OF DEMAND

Coincident Peak Demand shall be the average kW demand measured in the 60-minute interval used by the North Carolina Eastern Municipal Power Agency for wholesale billing purposes during the corresponding month of the customer's billing.

Excess Demand shall be the highest 15-minute demand recorded during the current billing cycle, less the Monthly Coincident Peak Demand for the current billing cycle.

Any time demand shall be the highest 15-minute demand recorded during the current billing cycle.

NOTIFICATION BY THE CITY

The City will use diligent effort to predict each monthly system peak and notify the customer in advance; however, the City is not able to guarantee an accurate prediction, and notice will be provided. Notification by the City will be provided to the customer by direct telephone communication or automatic signal, as mutually agreed. The customer will hold the City harmless in connection with its response to notification.

POWER FACTOR CORRECTION

Where the power factor of the consumer's installation is less than 85%, the City may correct kWh consumption for the month by multiplying by 85 and dividing by the actual power factor.

SALES TAX

To the above charges will be added any applicable North Carolina sales tax.

PAYMENT

Bills are due and payable no later than the due date reflected on the bill, which shall be no earlier than twenty (20) days from the date of the bill. If any bill is not so paid, the City has the right to suspend service in accordance with its service regulations.

CONTRACT PERIOD

The contract period shall not be less than one year, except for short-term, construction, or temporary service, in which case the contract period may be for the period requested by the customer, provided the customer agrees:

1. That the service supplied shall be for a continuous period until discontinued, and
2. That where it is necessary for City to extend lines, erect transformers, or do any work necessary to supply service, except for the installation of a self-contained meter, the Customer shall pay for the line extension in accordance with the City's customer service policies as may be amended from time to time.

GENERAL

Service rendered under this schedule is subject to the provisions of the City's service regulations, and any changes therein, substitutions therefore, or additions thereto lawfully made.

SECTION 7.

CITY OF NEW BERN
Commercial Electric Vehicle
Charging Station Service – CP
Schedule 14

AVAILABILITY

This schedule is available for electric service at a single point of utility metering at one of the City's standard voltages, for the purpose of providing power at commercially owned electric vehicle (EV) charging stations.

This schedule is not available whenever the monthly anytime demand exceeds 1,000 kW.

MONTHLY RATES

<i>Effective Date</i>	<u>7/1/2024</u>	<u>7/1/2025</u>	<u>7/1/2026</u>
Customer Charge	\$175.00	\$184.00	\$193.00
<i>Energy Charge</i>			
Load Factor less than or equal to 10% per kWh	\$0.1018	\$0.1040	\$0.1064
Load Factor Greater than 10% and less than or equal to 20% per kWh	\$0.0793	\$0.0815	\$0.0839
Load Factor greater than 20% per kWh	\$0.0568	\$0.0590	\$0.0614
<i>Demand Charges</i>			
Coincidental Peak Demand per kW	\$27.00	\$27.75	\$28.50
Excess Demand per kW	\$6.00	\$6.75	\$7.50

DETERMINATION OF BILLING DEMAND

Coincident Peak Demand shall be the average kW demand measured in the 60-minute interval used by the North Carolina Eastern Municipal Power Agency for wholesale billing purposes during the corresponding month of the customer's billing.

Excess Demand shall be the highest 15-minute any time demand recorded during the current billing month, less the Monthly Coincident Peak Demand for the current billing cycle.

Any Time Demand shall be the highest 15-minute demand recorded during the current billing cycle.

DETERMINATION OF ENERGY

Energy charge shall be determined by the calculated monthly load factor (LF). The energy charge shall adjust up or down when the calculated monthly load factor exceeds the threshold for a period of six (6) consecutive billing cycles. Load factor shall be determined by the total energy hours used during the billing cycle divided by the product of the anytime demand and the number hours in the billing cycle.

$$LF = \text{kWh} / (\text{Any Time Demand} \times \text{Hours in Billing Cycle})$$

NOTIFICATION BY THE CITY

The City will use diligent effort to predict each monthly system peak and notify the customer in advance; however, the City is not able to guarantee an accurate prediction, and notice will be provided. Notification by the City will be provided to the customer by direct telephone communication or automatic signal, as mutually agreed. The customer will hold the City harmless in connection with its response to notification.

POWER FACTOR CORRECTION

Where the power factor of the consumer's installation is less than 85%, the City may correct kWh consumption for the month by multiplying by 85 and dividing by the actual power factor.

SALES TAX

To the above charges will be added any applicable North Carolina sales tax.

PAYMENT

Bills are due and payable no later than the due date reflected on the bill, which shall be no earlier than twenty (20) days from the date of the bill. If any bill is not so paid, the City has the right to suspend service in accordance with its service regulations.

CONTRACT PERIOD

The contract period shall not be less than one year, except for short-term, construction, or temporary service, in which case the contract period may be for the period requested by the customer, provided the customer agrees:

1. That the service supplied shall be for a continuous period until discontinued, and
2. That where it is necessary for City to extend lines, erect transformers, or do any work necessary to supply service, except for the installation of a self-contained meter, the customer shall pay for the line extension in accordance with the City's customer service policies as may be amended from time to time.

GENERAL

Service rendered under this schedule is subject to the provisions of the City's service regulations, and any changes therein, substitutions therefore, or additions thereto lawfully made.

SECTION 8.

CITY OF NEW BERN
Utility Owned Electric Vehicle Charging Stations
Schedule 15

PURPOSE

The City recognizes the potential growth of electric vehicles (EV) across the City's electric service territory. The purpose of this pilot program is for the City to evaluate the impact of EV charging on the public electric system and/or any interest towards owning a network of publicly accessible EV charging stations.

AVAILABILITY

This service is available for EV charging stations owned by the City of New Bern. Charging stations are available for use by the public, exclusive to vehicles attempting to charge and not exclusive to City of New Bern electric customers.

Whereas charging station is defined as single point charging and charging site may have one or more charging stations. The City may throttle the available charging capacity of both the charging site and/or charging station to balance the impact of EV charging on the public electric distribution system. The City does not guarantee availability at charging sites or charging stations.

This service is not available where the total charging site requirement exceeds 125 kW.

Obstructing access to charging sites and/or stations is subject to towing and/or fines.

USAGE RATES

<i>Effective Date</i>	<u>7/1/2024</u>	<u>7/1/2025</u>	<u>7/1/2026</u>
<i>Active Energy Charging</i>			
Load Factor less than or equal to 10% per kWh	\$0.7100	\$0.7500	\$0.7900
Load Factor greater than 10% and less than or equal to 20% per kWh	\$0.4900	\$0.5100	\$0.5400
Load Factor greater than 20% per kWh	\$0.4000	\$0.4200	\$0.4400
 <i>In Active Charging</i>			
In active charging is applied after 10 minutes of idle charging and occupying space at the charger per minute	\$0.1800	\$0.1900	\$0.2000

DETERMINATION OF ACTIVE ENERGY CHARGING

Active Energy Charge shall be determined by calculating monthly load factor (LF) for the charging site. The energy charge shall adjust up or down when the calculated monthly load factor exceeds the threshold for a period of six (6) consecutive calendar months. Monthly load factor shall be determined by the total charging site energy hours used during the month divided by the product of the charging site blended demand capacity and the number of hours in the billing cycle.

$$LF = \text{kWh} / (120.04 \text{ kW} \times \text{Hours in Billing Cycle})$$

SALES TAX

To the above charges will be added any applicable North Carolina sales tax.

PAYMENT

Payment shall be made via the customers ChargePoint account. Cash and/or credit card transactions are not available.

CONTRACT PERIOD

The pilot program shall continue through February 12, 2023 per the contractual requirements set forth by the NCDEQ VW-DC Fast Program or extended as needed. Record keeping and reporting shall continue for a period of five (5) years following the expiration of the contract. At the end of the pilot program, the City may consider any further interest to own EV charging stations or divest their interest.

GENERAL

Service rendered under this schedule is subject to the provisions of the City's service regulations, and any changes therein, substitutions therefore, or additions thereto lawfully made.

SECTION 9.

CITY OF NEW BERN
Medium General Service #1
Schedule 08

AVAILABILITY

This schedule is available for electric service used at a single point of delivery, at one of the City’s standard voltages, used by any non-residential customer with a monthly demand of 35 kW or greater for at least two of the preceding twelve months, but less than 100 kW for 11 of the preceding twelve months.

This schedule is not available for: (1) residential service; (2) breakdown, standby, or supplementary service unless used in conjunction with applicable standby or generation service rider for a continuous period of not less than one year; (3) resale service; (4) Electric vehicle (EV) chargers; where EV chargers are the largest connected Any Time Demand (kW) at the point of utility metering. (5) or whenever the registered or computed demand equals or exceeds 100 kW. In order to determine that applicable rate schedule for a customer, the City will review that customer’s monthly readings once a year in one-year increments from the month that customer first started receiving bills under a new schedule.

MONTHLY RATES

For Single-Phase Service

<i>Effective Date</i>	<u>7/1/2024</u>	<u>7/1/2025</u>	<u>7/1/2026</u>
Customer Charge	\$27.00	\$31.50	\$36.00
Energy Charge per kWh	\$0.0863	\$0.0893	\$0.0926
Demand Charge per kW	\$9.00	\$9.75	\$10.50

For Three-Phase Service

<i>Effective Date</i>	<u>7/1/2024</u>	<u>7/1/2025</u>	<u>7/1/2026</u>
Bill computed for single-phase service plus	\$14.35	\$15.05	\$15.80

DETERMINATION OF DEMAND
The billing demand shall be the maximum kW registered or computed by or from the City’s metering facilities during any 15-minute interval within the current billing cycle.

Any Time Demand shall be the highest 15-minute demand recorded during the current billing cycle.

SALES TAX

To the above charges will be added any applicable North Carolina sales tax.

PAYMENT

Bills are due and payable no later than the due date reflected on the bill, which shall be no earlier than twenty (20) days from the date of the bill. If any bill is not so paid, the City has the right to suspend service in accordance with its service regulations.

CONTRACT PERIOD

The contract period shall not be less than one year, except for short-term, construction, or temporary service, in which case the contract period may be for the period requested by the customer, provided the customer agrees:

1. That the service supplied shall be for a continuous period until disconnected, and
2. That where it is necessary for City to extend lines, erect transformers, or do any work necessary to supply service, except for the installation of a self-contained meter, the customer shall pay for the line extension in accordance with the City's customer service policies as may be amended from time to time.

GENERAL

Service rendered under this Schedule is subject to the provisions of the City's Service Regulations, and any changes therein, substitutions therefore, or additions thereto lawfully made.

SECTION 10.

**CITY OF NEW BERN
Small Wholesale Customer Rate
Schedule 09**

AVAILABILITY

This schedule is available for electric used by a nonresidential customer at a single point of delivery at one of the City's standard voltages with a contract demand or a registered or computed demand of kW and greater but less than 750 kW.

This schedule is not available for (1) residential service; (2) breakdown, standby, or supplementary service unless used in conjunction with the applicable standby or generation service rider for a continuous period of not less than one year; (3) Electric vehicle (EV) chargers; where EV chargers are the largest Any Time Demand (kW) at the point of utility metering. (4) a new customer with a contract demand of 750 kW or more, or whenever the registered or computed demand equals or exceeds 1,000 kW in two or more of the preceding twelve months.

MONTHLY RATES

For Single-Phase Service

<i>Effective Date</i>	<u>7/1/2024</u>	<u>7/1/2025</u>	<u>7/1/2026</u>
Customer Charge	\$27.00	\$33.00	\$39.00
Energy Charge per kWh	\$0.0870	\$0.0856	\$0.0846
Demand Charge per kW	\$7.00	\$7.75	\$8.50

For Three-Phase Service

<i>Effective Date</i>	<u>7/1/2024</u>	<u>7/1/2025</u>	<u>7/1/2026</u>
The bill computed for single phase service plus	\$14.35	\$15.05	\$15.80

CONTRACT DEMAND

The contract demand shall be the kW of demand specified in the service agreement.

DETERMINATION OF DEMAND

The billing demand shall be the greater of the maximum kW registered or computed by or from the City's metering facilities during any 15-minute interval within the current billing cycle or 30

Any Time Demand shall be the highest 15-minute demand recorded during the current billing cycle.

SALES TAX

To the above charges will be added any applicable North Carolina sales tax.

PAYMENTS

Bills are due and payable no later than the due date reflected on the bill, which shall be no earlier than twenty (20) days from the date of the bill. If any bill is not so paid, the City has the right to suspend service in accordance with its service regulations.

CONTRACT PERIOD

The contract period shall not be less than one year, except for short-term, construction, or temporary service, in which case the contract period may be for the period requested by the customer, provided the customer agrees:

1. That the service supplied shall be for a continuous period until discontinued, and
2. That where it is necessary for City to extend lines, erect transformers, or do any work necessary to supply service, except for the installation of a self-contained meter, the Customer shall pay for the line extension in accordance with the City's customer service policies as may be amended from time to time.

GENERAL

Service rendered under this schedule is subject to the provisions of the City's service regulations, and any changes therein, substitutions therefore, or additions thereto lawfully made.

SECTION 11.

CITY OF NEW BERN
Large General Service #2 – CP
Schedule 06

AVAILABILITY

This schedule is available for electric service at a single point of delivery at one of the City's standard voltages, used by any non-residential customer with a monthly demand of 2000kW or greater for at least two of the preceding 12 months.

This schedule is not available for (1) residential service; (2) breakdown, standby, or supplementary service unless used in conjunction with applicable standby or generation service rider for a continuous period of not less than one year; (3) resale service; (4) Electric vehicle (EV) chargers; where EV chargers are the largest Any Time Demand (kW) at the point of utility metering or (5) whenever the monthly demand exceeds 100,000 kW. In order to determine the applicable rate schedule for a customer, the City will review that customer's monthly readings once a year, in one-year increments from the month that the customer first started receiving bills under a new schedule.

MONTHLY RATES

<i>Effective Date</i>	<u>7/1/2024</u>	<u>7/1/2025</u>	<u>7/1/2026</u>
Customer Charge	\$1,250.00	\$1,285.00	\$1,320.00
<i>Energy Charge</i>			
First 1,700,000 kWh	\$0.0529	\$0.0543	\$0.0564
Additional kWh	\$0.0445	\$0.0543	\$0.0564
<i>Demand Charges</i>			
Coincidental Peak Demand per kW	\$27.00	\$27.75	\$28.50
Excess Demand per kW	\$6.00	\$6.75	\$7.50

DETERMINATION OF DEMAND

Coincident Peak Demand shall be the average kW demand measured in the 60-minute interval used by the North Carolina Eastern Municipal Power Agency for wholesale billing purposes during the corresponding month of the customer's billing.

Excess Demand shall be the highest 15-minute demand recorded during the current billing cycle, less the Monthly Coincidental Peak Demand for the current billing cycle.

Any Time Demand shall be the highest 15-minute demand recorded during the current billing cycle.

NOTIFICATION BY THE CITY

The City will use diligent effort to predict each monthly system peak and notify the customer in advance; however, the City is not able to guarantee an accurate prediction, and notice will be provided. Notification by the City will be provided to the customer by direct telephone communications or automatic signal, as mutually agreed. The customer will hold the City harmless in connection with its response notification.

POWER FACTOR CORRECTION

Where the power factor of the consumer's installation is less than 85%, the City may correct kWh consumption for the month by multiplying by 85 and dividing by the actual power factor.

SALES TAX

To the above charges will be added any applicable North Carolina sales tax.

PAYMENT

Bills are due and payable no later than the due date reflected on the bill, which shall be no earlier than twenty (20) days from the date of the bill. If any bill is not so paid, the City has the right to suspend service in accordance with its service regulations.

CONTRACT PERIOD

The contract period shall not be less than one year, except for short-term, construction, or temporary service, in which case the contract period may be for the period requested by the customer, provided the customer agrees:

1. That the service supplied shall be for a continuous period until discontinued, and
2. That where it is necessary for City to extend lines, erect transformers, or do any work necessary to supply service, except for the installation of a self-contained meter, the Customer shall pay for the line extension in accordance with the City's customer service policies as may be amended from time to time.

GENERAL

Service rendered under this schedule is subject to the provisions of the City’s service regulations, and any changes therein, substitutions therefore, or additions thereto lawfully made.

SECTION 12.

CITY OF NEW BERN
Medium General Service #2
Schedule 10

AVAILABILITY

This Schedule is available for electric service used at a single point of delivery, at one of the City’s standard voltages, used by any non-residential customer with a monthly demand of 100 kW or greater for at least two of the preceding twelve months, but less than 750 kW for at least eleven of the preceding twelve months.

This schedule is not available for: (1) residential service; (2) breakdown, standby, or supplementary service unless used in conjunction with applicable standby or generation service rider for a continuous period of not less than one year; (3) resale service; (4) Electric vehicle (EV) chargers; where EV chargers are the largest Any Time Demand (kW) at the point of utility metering, (5) or whenever the monthly demand has equaled or exceeded 750 kW for at least two of the preceding twelve months. In order to determine the applicable rate schedule for a customer, the City will review that customer’s monthly readings once a year in one-year increments from the month that Customer first started receiving bills under a new schedule.

MONTHLY RATES

For Single-Phase Service

<i>Effective Date</i>	<u>7/1/2024</u>	<u>7/1/2025</u>	<u>7/1/2026</u>
Customer Charge	\$27.00	\$31.50	\$36.00
Energy Charge per kWh	\$0.0829	\$0.0862	\$0.0898
Demand Charge per kW	\$9.75	\$10.50	\$11.25

For Three-Phase Service

<i>Effective Date</i>	<u>7/1/2024</u>	<u>7/1/2025</u>	<u>7/1/2026</u>
Bill computed for single phase service plus	\$14.35	\$15.05	\$15.80

DETERMINATION OF DEMAND

The billing demand shall be the maximum kW registered or computed by or from the City’s metering facilities during any 15-minute interval within the current billing cycle.

Any Time Demand shall be the highest 15-minute demand recorded during the current billing cycle.

SALES TAX

To the above charges will be added any applicable North Carolina sales tax.

PAYMENT

Bills are due and payable no later than the due date reflected on the bill, which shall be no earlier than twenty (20) days from the date of the bill. If any bill is not so paid, the City has the right to suspend service in accordance with its service regulations.

Summer period – Coincident with April 15 through October 15: 1:00 – 6:00 p.m.

Winter period – Coincident with October 16 through April 14: 7:00 – 9:00 a.m.

Excess demand is the maximum demand registered or computed from the City's metering facilities used during any 15-minute interval in the off-peak hours of the current month, less the on-peak demand. If on-peak demand is greater than the off-peak demand, the excess demand charge will be zero.

Any Time Demand shall be the highest 15-minute demand recorded during the current billing cycle.

SALES TAX

To the above charges will be added any applicable North Carolina sales tax.

CONTRACT PERIOD

The contract period shall not be less than one year, except for short-term, construction, or temporary service, in which case the contract period may be for the period requested by the customer, provided the customer agrees:

1. That the service supplied shall be for a continuous period until discontinued, and
2. That where it is necessary for City to extend lines, erect transformers, or do any work necessary to supply service, except for the installation of a self-contained meter, the Customer shall pay for the line extension in accordance with the City's customer service policies and may be amended from time to time.

PAYMENT

Bills are due and payable no later than the due date reflected on the bill, which shall be no earlier than twenty (20) days from the date of the bill. If any bill is not so paid, the City has the right to suspend service in accordance with its service regulations.

GENERAL

Service rendered under this schedule is subject to the provisions of the City's service regulations, and any changes therein, substitutions thereof, or additions thereto lawfully made.

SECTION 14.

CITY OF NEW BERN
Medium General Service- CP Rate
Schedule 12

AVAILABILITY

This schedule is available on a volunteer basis for electric service used at a single point of delivery, at one of the City's standard voltages, used by any non-residential customer with a monthly demand of less than 750 kW for at least three of the preceding 12 months. Also, this schedule is available as an alternative to those customers who are currently being served under the Medium General Service rates (Schedules 4, 8 and 10) and Medium General Service Time-of-Use rates (Schedule 11).

This schedule is not available for: (1) residential service; (2) breakdown, standby, or supplementary service unless used in conjunction with applicable standby or generation service rider for a continuous period of not less than one year; (3) resale service; (4) Electric vehicle (EV) chargers; where EV chargers are the largest Any Time Demand (kW) at the point of utility metering (5) or whenever the monthly demand exceeds 750kW for at least

three months. In order to determine the applicable rate schedule for a customer, the City will review that customer's monthly readings once a year in one-year increments from the month that the customer first started receiving bills under a new schedule.

INITIAL FEES

The customer will be billed for the actual cost for the City to purchase and install the CP meter facilities, communications equipment, and any associated load management equipment as required by the City.

MONTHLY RATES

<i>Effective Date</i>	<u>7/1/2024</u>	<u>7/1/2025</u>	<u>7/1/2026</u>
Customer Charge	\$90.00	\$97.50	\$105.00
Energy Charge per kWh	\$0.0607	\$0.0630	\$0.0655
<i>Demand Charges</i>			
Coincidental Peak Demand per kW	\$27.00	\$27.75	\$28.50
Excess Demand per kW	\$6.00	\$6.75	\$7.50

DETERMINATION OF DEMAND

Coincident Peak Demand shall be the average kW demand measured in the 60-minute interval used by the North Carolina Eastern Municipal Power Agency for wholesale billing purposes during the corresponding month of the Customer's billing.

Excess Demand shall be the highest 15-minute demand recorded during the current billing cycle, less the Monthly Coincidental Peak Demand for the current billing cycle.

Any Time Demand shall be the highest 15-minute demand recorded during the current billing cycle.

NOTIFICATION BY THE CITY

The City will use diligent effort to predict each monthly system peak and notify the customer in advance; however, the City is not able to guarantee an accurate prediction, and notice will be provided. Notification by the City will be provided to the customer by direct telephone communication or automatic signal, as mutually agreed. The customer will hold the City harmless in connection with its response to notification.

POWER FACTOR CORRECTION

Where the power factor of the consumer's installation is less than 85%, the City may correct kWh consumption for the month by multiplying by 85 and dividing by the actual power factor.

SALES TAX

To the above will be added any applicable North Carolina sales tax.

PAYMENT

Bills are due and payable no later than the due date reflected on the bill, which shall be no earlier than twenty (20) days from the date of the bill. If any bill is not so paid, the City has the right to suspend service in accordance with its service regulations.

CONTRACT PERIOD

The contract period shall not be less than one year, except for short-term, construction, or temporary service, in which case the contract period may be for the period requested by the customer, provided the customer agrees:

1. That the service supplied shall be for a continuous period until discontinued, and
2. That where it is necessary for the City to extend lines, erect transformers, or do any work necessary to supply service, except for the installation of a self-contained meter, the Customer shall pay for the line extension in accordance with the City's customer service policies as may be amended from time to time.

GENERAL

Service rendered under the Schedule is subject to the provisions of the City's Service Regulations, and any changes therein, substitutions therefore, or additions thereto lawfully made.

SECTION 15.

CITY OF NEW BERN
Residential Service
Schedule 40, Schedule 50

AVAILABILITY

Service under this schedule is available for separately metered and billed supply of alternating electric current to single family residences, including a residential farm where the farm uses are not taken through a separate meter.

A one-ton minimum central air conditioner must be present at these services, and these services must be participating in the 100% Air Conditioner Load Control Program. Under the 100% control, and air conditioner's compressor is turned off for the duration of every load management period. All applicable appliances must have load-management switches installed to participate in this rate schedule.

This schedule is not available for (a) individual motors rated on 15HP; (b) commercial use as in hotels, public inns, motels, auto courts, tourist camps, and trailer camps; (c) separately metered accessory buildings or equipment on residential property not suitable for residential use; or (d) bulk barns or other seasonal high use facilities.

Non-fossil energy sources caused by acts of nature, such as wind or solar, are permitted as supplements to customer's energy requirements provided City is granted the right to install, operate and monitor special equipment to measure customer's load or any part thereof and to obtain any other data necessary to determine the operating characteristics and effects of the installation.

APPLICABILITY

The schedule is applicable to all electric service of the same available type supplied to the customer's premises at one point of delivery through one kilowatt-hour meter in accordance with Schedule 40 and Schedule 50 below.

ADDITIONAL POINTS OF DELIVERY

Additional points of delivery installed on structures at same premises for other than residential dwelling purposes shall be billed under the appropriate General Service Rate Schedule.

TYPE OF SERVICE

The types of service to which this schedule is applicable are alternating current, 60 hertz, either single-phase two or three wires, or three-phase four wires at City's standard voltages of 240 volts or less.

SCHEDULE 40 (Residential 100% A/C Control) 100% Air

Condition Control Discount

For service participating in the I (D0Zo Air Conditioner Control, all energy usage over 800 kWh will be discounted 15% based on the Schedule E01 (Standard Residential Service) rate.

MONTHLY RATE

For Single-Phase Service

<i>Effective Date</i>	<u>7/1/2024</u>	<u>7/1/2025</u>	<u>7/1/2026</u>
Customer Charge	\$12.00	\$14.00	\$16.00
<i>Energy Charges</i>			
For the first 300 kWh	\$0.1060	\$0.1105	\$0.1154
For 300 to 800 kWh	\$0.1217	\$0.1262	\$0.1311
For all additional kWh	\$0.1026	\$0.1044	\$0.1065

For Three-Phase Service

<i>Effective Date</i>	<u>7/1/2024</u>	<u>7/1/2025</u>	<u>7/1/2026</u>
The bill computed for single phase service plus	\$14.35	\$15.05	\$15.80

SCHEDULE 50 (Energy Efficient Residential 100% A/C Control Rate) Energy Conservation Discount

Where customer notifies company and customer's dwelling complies with the thermal and load management requirements referenced in Schedule E07, all energy usage will be discounted by 5% based on the Schedule E01 (Residential Service) rate in addition to the 100% Air Conditioner Control discount above.

MONTHLY RATES

For Single-Phase Service

<i>Effective Dates</i>	<u>7/1/2024</u>	<u>7/1/2025</u>	<u>7/1/2026</u>
Customer Charge	\$12.00	\$14.00	\$16.00
<i>Energy Charges</i>			
For the first 300 kWh	\$0.1007	\$0.1050	\$0.1096
For 300 to 800 kWh	\$0.1156	\$0.1199	\$0.1245
For all additional kWh	\$0.0940	\$0.0936	\$0.0935

For Three-Phase Service

<i>Effective Date</i>	<u>7/1/2024</u>	<u>7/1/2025</u>	<u>7/1/2026</u>
The bill computed for single phase service plus	\$14.35	\$15.05	\$15.80

THERMAL REQUIREMENTS

CONVENTIONAL HOUSING

In no case shall the structure's heat loss, including duct heat loss, be greater than 0.1 watts (.34 Btuh) per square foot of net heated floor area per degree Fahrenheit temperature difference. Generally, the criteria may be satisfied if the following provisions are met:

- A. Ceilings with an installed insulation thermal resistance value of R-30.
- B. Exterior walls with an installed insulation thermal resistance value of R-13.
- C. Floors over crawl spaces with an installed insulation thermal resistance value of R-19.

- D. All windows should be insulated double pane glass or single pane glass with storm windows.
- E. All exterior doors should be wood with storm doors or insulated metal doors.
- F. Adequate natural or mechanical attic ventilation should be provided.
- G. Effective with building permits issued 7/1/02, the dwelling is all electric (range-oven, heating, air conditioning, water heater, dryer).

MANUFACTURED HOUSING

In no case shall the structure's heat loss, including duct loss, be greater than 0.125 watts (0.43 Btu), per square foot of net heated floor area per degree Fahrenheit temperature difference. Generally, these criteria may be satisfied if the following provisions are met:

- A. Ceilings with an installed insulation thermal resistance value of R-19.
- B. Exterior walls with an installed insulation thermal resistance value of R-13.
- C. Floors over crawlspaces with an installed insulation thermal resistance value of R-19.
- D. All windows should be insulated double pane glass or single pane glass with storm windows.
- E. All exterior doors should be wood with storm doors in insulated metal doors.
- F. Effective with building permits issued 7/1/02, the dwelling is all electric (range-oven, heating, air conditioning, water heater, dryer).

A copy of the manufacturer's certificate stating that the manufactured home in question meets or exceeds the above thermal requirements shall be submitted to the City's Electric Utilities Department in order to obtain the 5% energy efficient discount.

PAYMENT

Bills are due and payable no later than the due date reflected on the bills, which shall be no earlier than twenty (20) days from the date of the bill. If any bill is not so paid, the City has the right to suspend service in accordance with its service regulations.

SALES TAX

To the above charges will be added any applicable North Carolina sales tax.

CONTRACT PERIOD

The contract period shall not be less than one year.

GENERAL

Service rendered under this schedule is subject to the provisions of the City's service regulations, and any changes therein, substitutions therefore, or additions thereto lawfully made.

SECTION 16.

CITY OF NEW BERN
Extra Facilities Charges – Generation
Schedule 70

AVAILABILITY

Service under this schedule is intended to be in conjunction with the following rate schedules: Medium General Service CP – Schedule 12, Large General Service #2 CP – Schedule 6, and Large General Service AI CP – Schedule 13. This schedule is available for parallel operation of City-owned, operated and maintained generation systems located on the customer's premises for the purpose of demand reduction during load management periods. This schedule is to be used in conjunction with the provisions of a generation agreement with the City.

This schedule is available on a first come, first serve basis provided that the aggregate capacity of all the recognized generators operation on the City's electric system shall not exceed that of the City of New Bern's generation allocation as required by the North Carolina Eastern Municipal Power Agency policy. If a customer's proposed installation results in exceeding the aforementioned threshold, the customer will be notified that service under this schedule will not be available.

MONTHLY RATES

Existing City Owned Generator

Based on Generator Nameplate Rating: kW
Capacity Rating

\$2.96 per kW

New City Owned Generator

All new generator installations or new replacement generator installations shall be billed in accordance with the City of New Bern Customer Service policies for "Extra Facilities" under Schedule 70.

CONTRACT

PERIOD

Service will be provided under this schedule only after a generation agreement is executed including special terms and conditions for the customer's requirements, if any, which are satisfactory to the City.

PAYMENT

Bills are due and payable no later than the due date reflected on the bill, which shall be no earlier than twenty (20) days from the date of the bill. If nay bill is not so paid, the City has the right to suspect service in accordance with its service regulations.

GENERAL

Service rendered under this schedule is subject to the provisions of the City's service regulations and any changes therein, substitutions therefore, or additions thereto lawfully made.

SECTION 17.

CITY OF NEW BERN
Renewable Resource Facilities Credit
Schedule 60

AVAILABILITY

Service under this schedule is intended to be in conjunction with the applicable rate schedule and is available for parallel operation of non-City-owned, single-phase, small generation systems, which are rated at 10 kWh or less for residential customers, and 100 kWh or less for non-residential customers. These systems shall be derived from renewable resources including photovoltaic, wind-powered, or bio-mass-fueled generating systems without battery storage located at the customer's primary residence or business. The generating system that is used in parallel operation with service from the City and located on the customer's premises must be manufactured, installed, and operated in accordance with all governmental and industry standards, meet all requirements of the local code official, and must fully conform with City of New Bern's applicable renewable energy interconnection interface criteria. Customer with qualified systems may apply for NC Green Power credits.

This schedule is available on a first come, first serve basis, provided that the aggregate capacity of all the customer generators operating pursuant to this schedule shall not exceed 5% of the City of New Bern's retail peak load for the prior calendar year. If a customer's proposed installation results in exceeding the aforementioned 5% threshold, the customer will be notified that service under this schedule is not available.

TYPE OF SERVICE

The only type of service to which this Schedule is applicable is alternating current, 60 hertz, single-phase, or three-phase, two, three, or four wires at company's standard voltages of 480 volts or less.

MONTHLY CREDIT

Energy Credit:

All kWh delivered per kWh \$0.0487

CONTRACT PERIOD

Service will be provided under this schedule only after a service agreement is executed including special terms and conditions for the customer's requirements, if any, which are satisfactory to the City.

SPECIAL CONDITIONS

1. Renewable energy generators, non-fossil energy sources caused by acts of nature such as wind or solar, are permitted as supplements to the customer's energy requirements provided the City is granted the right to install, operate, and monitor special equipment to measure the customer's load or any part thereof, and can obtain any other data necessary to determine the operating characteristics and effects of the installation.
2. All installations of non-City-owned, small generation systems to be operated in parallel with the City electric system shall be required to comply with the North Carolina Utilities Commission (NCUC) "Standard for Interconnecting Small Generation 100 kW or less with Electric Power Systems (EPS)." It is the customer's responsibility to ensure compliance with all such NCUC requirements, file all applications, and resolve all fees associated with the NCUC's interconnection standard prior to the parallel operation of any installed equipment.
3. Customers with renewable energy generators, as outlined above, that are designated to operate in excess of the customer's load at any time are required to function in compliance with the

City's Supplemental Power Supply contract with the North Carolina Eastern Municipal Power Agency. Under this requirement, each customer will be required to enter into a unique Electric Service Agreement with the City detailing the specifications of the installation the rate schedule to be followed for the power supplied by the renewable resource generator. The customer's service shall be metered with two meters – one to measure all energy provided by the City and used by the customer, and all other to measure the amount of energy generated by the customer's renewable energy generator.

4. All customers applying for installations of photovoltaic non-City-owned, small generation systems to be operated in parallel with the City electric system shall be required to complete and comply with the City of New Bern's Application and Procedures for Interconnecting a Certified Photovoltaic Generating Facility ("Application"). The customer must complete the Application and submit the same to the City prior to receiving service under this schedule.
5. All customers who install a non-City-owned, small generation system to be operated in parallel with the City electric system shall be required to submit a certification of general liability insurance naming the City as additional insured in the amount of \$100,000 per occurrence. Certifications are to be submitted for review and approval by the City on an annual basis as long as the renewable resource generator is interconnected with the City's electric system.
6. In the event that the City determines that it is necessary to install a dedicated transformer or other equipment to protect the safety and adequacy of electric service provided to other City customers, the customer shall pay a Monthly Facilities Charge of 2% of the total installed cost of such additional facilities. The Monthly Facilities Charge shall not be less than \$25.00.
7. The City reserves the right to test the customer's alternative energy generator for compliance with the applicable interface criteria. Should the City determine that the customer's installation is in violation of such criteria, the City will disconnect the alternative energy generator from the City's electric distribution system. The customer's alternative energy generator will remain disconnected until the installation is brought back into compliance with the applicable interface criteria.

GENERAL

Service rendered under this schedule is subject to the provisions of the City's service regulations and any changes therein, substitutions therefore, or additions thereto lawfully made.

SECTION 18.

CITY OF NEW BERN
Commercial/Industrial Load Profile Data Service
Schedule – LPDS

AVAILABILITY

This schedule is available for City of New Bern commercial and industrial customers receiving electric service at a single point of delivery and utilizing any of the commercial or industrial rate schedules. This schedule is not available for residential service.

TYPE OF SERVICE

This service provides customers with self-service access to load profile meter information via an internet portal. Service requires a customer provided internet service to access the service.

SET UP FEE

<i>Effective Date</i>	<u>7/1/2024</u>	<u>7/1/2025</u>	<u>7/1/2026</u>
One time set up fee per meter	\$157.50	\$165.40	\$173.65

MONTHLY RATES

<i>Effective Date</i>	<u>7/1/2024</u>	<u>7/1/2025</u>	<u>7/1/2026</u>
Day After Data Service: 15-minute interval data updated the day after	\$42.50	\$44.65	\$46.90
Same Day Hourly Data Service: 15-minute interval data updated hourly	\$94.50	\$99.25	\$104.20

AVAILABILITY OF SERVICE

The City will use reasonable effort to ensure the availability of data is not delayed or interrupted, however, the City is not able to guarantee service. The City shall not be liable for force majeure for any failure to deliver service beyond its control and not limited to acts of God, acts of public enemy, natural disasters, severe weather or interruptions in power. The customer shall indemnify and hold the City harmless with respect to all costs and expense whatsoever, including, but not limited to, attorney’s fees and court costs incurred in connection with, or as a result of, any and all such claims for damage arising out of or in connection with its use of this service.

SALES TAX

To the above charges will be added any applicable North Carolina sales tax.

PAYMENT

Bills are due and payable no later than the due date reflected on the bill, which shall be no earlier than twenty (20) days from the date of the bill. If any bill is not so paid, the City has the right to suspend service in accordance with its service regulations.

CONTRACT PERIOD

The contract period shall not be less than one year and continuously renew. The contract may be terminated by either party in whole or part for convenience upon a ninety (90) day written notice.

GENERAL

Service rendered under this schedule is subject to the provisions of the City’s service regulations, and any changes therein, substitutions therefore, or additions thereto lawfully made.

SECTION 19.

CITY OF NEW BERN
Unmetered Service
Schedule UMS

AVAILABILITY

This service is available at a single point of delivery when service is rendered on an unmetered basis and the Customer’s total nameplated electrical requirement is demonstrated to be 100 watts or less. Service is limited to Federal, State, Local Government and North Carolina registered franchise telecommunication service providers.

SERVICE

Each point of delivery shall require an application for service and be considered as the contract location.

The Customer shall install a current limiting device on the load side of the electric utility's point of delivery and comply with local inspection authorities' requirements. The City reserves the right to inspect the Customer's equipment at any time to verify actual load. Service is limited to 120 volts, single phase and locations no further than 100 feet from the 120 volt source.

Customer attachments are prohibited on electric utility structures and/or poles except where the Customer has established a pole attachment agreement with the utility. The customer's point of service cannot interrupt service to other utility customers or connect in between the public electric system and the point of delivery to other customers.

The City's electric utility reserves the right to determine the feasibility of providing service and refuse service based such feasibility. In the event of a Customer's failure to notify the City of an increase in load, the City reserves the right to refuse to serve this contract location thereafter under the provision and to require Customer rewire to permit metered service.

This service is not available for short-term, construction, temporary, breakdown, back-up standby or lighting service. Monthly pole rental service is not available with this schedule. Upon request, the utility may consider the feasibility of providing the Customer a pole. The cost of the pole shall include the electric utilities material, labor and equipment cost. The sale and installation of a pole/s shall require a separately administered agreement.

MONTHLY RATES

The monthly rates do not include charges for additional facilities, poles, underground service and/or other services provided.

<i>Effective Date</i>	<u>7/1/2024</u>	<u>7/1/2025</u>	<u>7/1/2026</u>
Customer Charge	\$25.00	\$29.50	\$34.00
<i>Energy Charges</i>			
Wattage rating of 10w or less	\$0.9500	\$0.9900	\$1.04
Wattage rating of 11w but not greater than 50w	\$2.00	\$2.10	\$2.20
Wattage rating of 51w but not greater than 100w	\$3.99	\$4.19	\$4.40

SALES TAX

To the above charges will be added any applicable North Carolina sales tax.

PAYMENTS

Bills are due and payable no later than the due date reflected on the bill, which shall be no earlier than twenty (20) days from the date of the bill. If any bill is not so paid, the City has the right to suspend service in accordance with its service regulations.

CONTRACT PERIOD

The contract period shall not be less than three years for overhead service and not less than five years for underground service and shall extend from year to year thereafter until terminated by the customer or the City.

The Customer may terminate the agreement before the expiration of the initial contract period by paying to the City the sum of money equal to 40% of the bills which otherwise would have been rendered for the unexpired months of the initial contract.

The City may require the customer to initially make a termination deposit which will not exceed the termination amount computed in accordance with the above paragraph. Such termination deposit will be refunded in equal amounts at the end of each full year service is rendered. This annual refund will be the termination deposit divided by the number of years in the contract period.

GENERAL

Service rendered under this schedule is subject to the provisions of the City's service regulations, and any changes therein, substitutions therefore, or additions thereto lawfully made.

SECTION 20.

CITY OF NEW BERN
Area Lighting Schedule
Schedule 04

AVAILABILITY

This schedule is available for service supplied to the lighting of outdoor areas, private streets, and private driveways by means of mercury vapor or sodium vapor lighting units. Lighting units will be bracket mounted on City-owned poles, and the mercury vapor lamps will be color corrected.

This Schedule is not available for the lighting of dedicated streets or highways.

SERVICE

Prior to installing area lighting facilities, the customer and the City must execute the City's form entitled "Application for Area Lighting Service". The service supplied by the City will include the installation and operation, according to City standards and requirements, of the area lighting units, and will include the furnishing of electricity required for the illumination of the lamps from dusk to dawn. After the customer has notified the City that a lamp is not burning, the City will perform, as soon as practicable during regular working hours, the necessary maintenance to restore illumination. The lumen rating of the lighting units listed under the Monthly Rate indicates the class of lamp.

MONTHLY RATES

Overhead Service

BASIC RATE: The basic rate per fixture defined below will be billed for installations of standard area lighting fixtures installed on City's system distribution poles. The basic rate does not include the monthly charges for additional facilities, area lighting poles, underground service or any contribution required under this Schedule:

<i>Effective Dates</i>	<u>7/1/2024</u>	<u>7/1/2025</u>	<u>7/1/2026</u>
<i>Mercury Vapor (Obsolete – Not available for new or replacement)</i>			
7,000 lumen semi enclosed 175w	\$11.95	\$12.55	\$13.20
7,000 lumen 175w	\$13.95	\$14.65	\$15.40
60,000 lumen 1000w Flood	\$46.85	\$49.20	\$51.65

<i>Sodium Vapor (Obsolete – Not available for new or replacement)</i>			
9,500 lumen 100w	\$15.90	\$16.70	\$17.55
22,000 lumen 150w	\$19.70	\$20.70	\$21.75
27,500 lumen 250w Flood	\$22.40	\$23.50	\$24.70
50,000 lumen 400w Flood	\$34.80	\$36.55	\$38.40
<i>Metal Halide (Obsolete – Not available for new or replacement)</i>			
Cobra Head 500w	\$34.80	\$36.55	\$38.40
1000w Flood	\$46.85	\$49.20	\$51.65
<i>LED</i>			
50w	\$19.70	\$20.70	\$21.75
300w Flood	\$34.80	\$36.55	\$38.40

Area Lighting Poles Served by Underground Service

A monthly fee per pole will apply for lighting connected by underground service as shown in the rates below. In lieu of the monthly fee, customers may pay a one-time contribution at the time of installation. The monthly fee may be terminated at any time up payment of the one-time contribution.

<i>Effective Date</i>	<u>7/1/2024</u>	<u>7/1/2025</u>	<u>7/1/2026</u>
Underground per pole (per month)	\$5.15	\$5.40	\$5.65
Underground one time contribution per pole (per month)	\$258.84	\$271.78	\$285.37

Area Lighting Poles

A monthly fee per pole will apply when lighting is provided by use of a City owned pole as shown in the rates below.

<i>Effective Date</i>	<u>7/1/2024</u>	<u>7/1/2025</u>	<u>7/1/2026</u>
Wood per pole (per month)	\$3.10	\$3.25	\$3.40
Special Metal or Fiberglass per pole (per month)	\$7.30	\$7.65	\$8.05

SALES TAX

To the above charges will be added any applicable North Carolina sales tax.

ADDITIONAL FACILITIES

1. Multiple area lighting fixtures may be installed per pole subject to the City's review and approval. The monthly charge for each additional fixture will be the charge in accordance with the Monthly Rate for that fixture, plus 2% of the estimated installed cost of the facilities necessary to serve the multiple fixture installation excess of that normally required to provide standard area lighting service.
2. For each distribution transformer and/or primary conductor extension, 2% of the estimated installed cost of the required facilities.
3. For an underground circuit in excess of 250 feet for an area lighting pole, 2% of the estimated installed cost of the excess circuit.

4. For a metal pole, 2% of the estimated installed cost of overhead or underground metal poles requiring special construction of features which are in excess of the estimated installed cost of standard underground metal poles.
5. When more energy efficient and otherwise more practical lighting units become available to the City, they will be made available for use under this schedule. The appropriate charge for such units will be developed by the City Electric Department. Said charges are to be incorporated by amendment to this Schedule by the City.

NON-REFUNDABLE CONTRIBUTION

1. In the event that rock, unstable soil, or other conditions require the use of materials and methods of installation other than the City's normal materials and methods, the customer will contribute the additional cost incurred as a result thereof.
2. The customer will contribute the estimated cost of installing cables under paved or landscaped surface areas; however, the customer may cut and replace the pavement or surface in lieu of making the contribution.
3. Service supplied under the Monthly Rate in this schedule does not include the conversion of existing overhead secondary conductors to underground. Should the customer desire such a conversion under this schedule, the customer will contribute the City, in addition to the applicable contribution above, the estimated net loss in salvage value of the overhead facilities being removed. The customer will thereafter pay the applicable rate for underground service.

PAYMENT

Bills are due and payable no later than the due date reflected on the bill, which shall be no earlier than twenty (20) days from the date of the bill. If any bill is not so paid, the City has the right to suspend service in accordance with its service regulations.

CONTRACT PERIOD

The contract period shall not be less than three years for overhead service and not less than five years for underground service and shall extend from year to year thereafter until terminated by the customer or the City. The customer may terminate the agreement before the expiration of the initial contract period by paying to the City a sum of money equal to 40% of the bills which otherwise would have been rendered for the unexpired months of the initial contract period.

The City may require the customer to initially make a termination deposit which will not exceed the termination amount computed in accordance with the above paragraph. Such termination deposit will be refunded in equal amounts at the end of each full year service is rendered. This annual refund will be the termination deposit divided by the number of years in the contract period.

GENERAL

Service rendered under this schedule is subject to the provisions of the City of New Bern Customer Service Policies.

SECTION 21.

CITY OF NEW BERN
Street Lighting Service
Schedule 32-A

AVAILABILITY

This schedule is available for service supplied in the lighting of dedicated public streets, highways, and municipally owned and operated public parks and public parking lots, by lighting fixtures mounted on City-owned poles for the City of New Bern.

SERVICE

The service supplied by the City will include the installation of a street lighting system, according to the City's standards and requirements, which will be owned, maintained, and operated by the City, including the furnishing of the electricity required for the illumination of the lamps from dusk to dawn. The lumen ratings of lighting units listed under the monthly rate indicates the general class of the lamp.

MONTHLY RATES

Overhead Service

Basic Rate: The basic rate per fixture defined below will be billed for installations of standard street lighting fixtures installed on the City's electric system distribution poles. The basic rate does not include the monthly charges for additional facilities, street lighting poles, underground service, or any contribution required under this schedule and under the City of New Bern Customer Service Policies.

Monthly Charge Per Fixture

<i>Effective Date</i>	<u>7/1/2024</u>	<u>7/1/2025</u>	<u>7/1/2026</u>
<i>Mercury Vapor (Obsolete not available for new or replacement)</i>			
7,000 lumen 175w	\$8.85	\$9.30	\$9.75
<i>Metal Halide (Obsolete not available for new or replacement)</i>			
400w Flood	\$13.85	\$14.55	\$15.30
1000w Flood	\$15.20	\$15.95	\$16.75
<i>Sodium Vapor (Obsolete not available for new or replacement)</i>			
9,500 lumen 100w	\$8.20	\$8.60	\$9.05
22,000 lumen 150w	\$8.85	\$9.30	\$9.75
27,500 lumen 250w	\$11.30	\$11.85	\$12.45
50,000 lumen 400w	\$13.85	\$14.55	\$15.30
<i>LED</i>			
5,240 lumen 39w – Acorn	\$19.75	\$20.75	\$21.80
9,505 lumen 70w – Cobra	\$13.10	\$13.75	\$14.45
10,868 lumen 110w - Town & Country	\$18.50	\$19.45	\$20.40
15,501 lumen 160w - Gardco	\$40.80	\$42.85	\$33.35

ADDITIONAL FACILITIES

1. Special poles and lighting fixtures normally not provided by the utility can be provided at the City's cost for fixtures.
2. For each primary conductor extension, 2% of the estimated installed cost of the required facilities.

3. For a bracket or mast arm in excess of 6 feet for underground service or 16 feet for overhead service, 2% of the estimated installed cost of the required facilities of that for standard facilities.
4. For an underground circuit in excess of 250 feet for a street lighting pole, 2% of the estimated installed cost of the excess circuit. Customer has the option of making a non-refundable contribution of the estimated installed cost of an underground circuit in excess of 250 feet per span in lieu of paying the monthly facilities charge for such excess circuit.
5. For a metal pole, 2% of the estimated installed cost of overhead or underground metal poles requiring special construction or features which are in excess of the estimated installed cost of standard underground metal poles.
6. When more energy efficient and better suited lighting units become available to the City, they will be made available for use under this schedule. The appropriate charges for such units will be developed by the City Electric Department. Said charges are to be incorporated by amendment to this schedule by the City.

NON-REFUNDABLE CONTRIBUTION

1. In the event that rock, unstable soil, or other conditions require the use of materials and methods of installation other than City's normal materials and methods, the customer will contribute the additional cost incurred as a result thereof.
2. The customer will contribute the estimated cost of installing cables under paved or landscaped surface area; however, the customer may cut and replace the pavement or surface in lieu of making the contribution.
3. Service supplied under the Monthly Rate in this schedule does not include the conversion of existing overhead street-lighting circuits to underground. Should the customer desire such a conversion under this schedule, customer will pay to the City, in addition to the applicable contribution and charges herein, the estimated net investment depreciated, plus removal cost, less salvage value of the overhead conductor being removed.

SALES TAX

To the above charges will be added any applicable North Carolina sales tax.

PAYMENT

Bills are due and payable no later than the due date reflected on the bill, which shall be no earlier than twenty (20) days from the date of the bill. If any bill is not so paid, the City has the right to suspend service in accordance with its service regulation.

SECTION 22.

CITY OF NEW BERN
Street Lighting Service
Schedule 32-B (Residential Subdivision)

AVAILABILITY

This schedule is available for service supplied in the lighting of residential dedicated public streets by means of mercury vapor or sodium vapor lighting units installed within residential subdivisions, consisting of single or duplex dwelling units, located outside the corporate limits of a municipality at the time of the installation. This schedule is not available to supply service for the lighting of parking lots, shopping centers, other public or commercial areas within the residential subdivision, or areas not specifically provided for by the provisions herein.

SERVICE

The service supplied by the City will include the installation of a street lighting system, according to the City's standards and requirements, which will be owned, maintained, and operated by the City, including the furnishing of the electricity required for the illumination of the lamps from dusk to dawn. Lighting units will be located by the City to provide the most uniform lighting possible in the residential area. The lumen ratings of the lighting units furnished under the monthly rate indicate the class of lamp.

MONTHLY RATES

The following amount will be added to each monthly bill rendered for residential electric service within the subdivision:

Overhead Distribution Area

<i>Effective Date</i>	<u>7/1/2024</u>	<u>7/1/2025</u>	<u>7/1/2026</u>
<i>Bracket mounted, enclosed luminaire on approved wood pole 1 light</i>			
<i>Per 10 customers or major fraction thereof</i>			
7,000 lumen Mercury Vapor (per customer)	\$1.54	\$1.62	\$1.70
9,500 lumen Sodium Vapor (per customer)	\$1.54	\$1.62	\$1.70
<i>1 light per 5 customers or major fraction thereof</i>			
7,000 lumen Mercury Vapor (per customer)	\$3.09	\$3.24	\$3.40
9,500 lumen Sodium Vapor (per customer)	\$3.09	\$3.24	\$3.40

Underground Distribution Area

<i>Effective Date</i>	<u>7/1/2024</u>	<u>7/1/2025</u>	<u>7/1/2026</u>
<i>Bracket-mounted, enclosed luminaire on approved wood pole 1 light</i>			
<i>Per 10 customers or major fraction thereof</i>			
7,000 lumen Mercury Vapor	\$2.19	\$2.30	\$2.42
9,500 lumen Mercury Vapor	\$2.19	\$2.30	\$2.42
<i>1 lighter per 5 customers or major fraction thereof</i>			
7,000 lumen Mercury Vapor	\$4.40	\$4.60	\$4.85
9,500 lumen Mercury Vapor	\$4.40	\$4.60	\$4.85
<i>Bracket mounted, enclosed luminaries on standard metal pole</i>			
<i>1 light per 10 customers or major fraction thereof</i>			
7,000 lumen Mercury Vapor per customer	\$2.50	\$2.60	\$2.75

9,500 lumen Sodium Vapor per customer	\$2.50	\$2.60	\$2.75
<i>1 light per 6 customers or major fraction thereof</i>			
7,000 lumen Mercury Vapor per customer	\$4.20	\$4.40	\$4.65
<i>Approved post mounted type luminaries</i>			
<i>1 light per 10 customers or major fraction thereof</i>			
7,000 lumen Mercury Vapor per customer	\$2.50	\$2.60	\$2.75
9,500 lumen Sodium Vapor per customer	\$2.50	\$2.60	\$2.75
<i>1 light per 6 customers or major fraction thereof</i>			
7,000 lumen Mercury Vapor per customer	\$4.20	\$4.40	\$4.65
9,500 lumen Sodium Vapor per customer	\$4.20	\$4.40	\$4.65

ANNEXATION CONSIDERATION

If any of the following conditions exist, the developer of the subdivision will be required to obtain from the municipal governing agency, its written approval of the street lighting service being provided under this schedule, and the number and locations of the lights to be installed.

1. The subdivision abuts a boundary of the municipality.
2. It is known that the subdivision will be annexed into the municipality.
3. The municipal governing agency has enacted a subdivision control ordinance that applies to the subdivision or any portion thereof.

If the subdivision is subsequently annexed and the municipality accepts the street lighting under a street lighting service contract on the rate for the equivalent lighting unit, the following will apply:

1. Overhead Distribution: If the municipality accepts the street lighting service under Street Lighting Service Schedule, no monthly customer charge will be applied to the subdivision residents.
2. Underground Distribution: If the municipality accepts the street lighting service under Street Lighting Service Schedule and agrees to pay the contribution under the schedule for the street lighting system, no monthly customer charge will be applied to the subdivision residents.

If the subdivision is subsequently annexed and the municipality does not accept the installed street lighting under a street lighting contract, the service will continue to be provided under this Schedule with the applicable monthly charge.

SECTION 23.

CITY OF NEW BERN
Street Lighting Service
Schedule 32-C

AVAILABILITY

This Schedule is available for service supplied in the lighting of residential dedicated public streets by means of sodium vapor lighting units installed within residential subdivisions, consisting of single or duplex dwelling units, located within the city limits of the City of New Bern. This Schedule applies to all developments in which streets have not been accepted for maintenance by the City under the Land Use Ordinance. This Schedule is not available to supply service for the lighting of parking lots, shopping centers, other public or commercial areas within the residential subdivision, or areas not specifically provided for by the provisions herein.

SERVICE

The service supplied by the City will include the installation of a street lighting system, according to City’s standards and requirements, which will be owned, maintained, and operated by the City, including the furnishing of the electricity required for the illumination of the lamps from dusk to dawn. Lighting units will be located by the City to provide the most uniform lighting possible in the residential area. The lumen ratings of the lighting units furnished under the monthly rate indicate the class of lamp.

The developer shall open a street lighting account and sign a standard lighting contract with the City of New Bern.

The developer shall pay for all streetlights per City of New Bern Schedule 32-C until the street or streets within the development are accepted for maintenance under the Land Use Ordinance of the City of New Bern, at which time the City of New Bern will assume the cost of the lighting.

All streetlights shall be made operational once the electric system is energized, at which time the developer will become responsible for a monthly payment to the City of New Bern per the City of New Bern Street Lighting Service Schedule 32-C.

MONTHLY RATES

Overhead Service

Basic Rate: The basic rate per fixture defined below will be billed for installations of standard street lighting fixtures installed on City’s system distribution poles. The basic rate does not include the monthly charges for additional facilities, street lighting poles, underground service, or any contribution required under this Schedule and under the Street Lighting Service Regulations.

Monthly Charge Per Fixture

<i>Effective Rate</i>	<u>7/1/2024</u>	<u>7/1/2025</u>	<u>7/1/2026</u>
<i>Sodium Vapor</i>			
22,000 lumen 150w	\$8.85	\$9.30	\$9.75
50,000 lumen 400w	\$13.85	\$14.55	\$15.30
50,000 lumen 400w Flood	\$15.20	\$15.95	\$16.75
<i>High Pressure Sodium</i>			
250w	\$11.30	\$11.85	\$12.45

ADDITIONAL FACILITIES

1. For primary conductor extensions, 2% of the estimated installed cost of the required facilities will be charged to the customer as outlined in the Customer Service Policies section regarding additional facilities.
2. For a bracket or mast arm in excess of 6 feet for underground service or 16 feet for overhead service, 2% of the estimated installed cost of the required facilities of that for standard facilities will be charged to the customer as outlined in the Customer Service Policies section regarding additional facilities.
3. For an underground circuit in excess of 250 feet for the installation of a street light pole, 2% of the estimated installed cost will be considered an additional facility. Customer has the option of making a non-refundable contribution of the estimated install cost of an underground circuit in excess of 250 feet per span in lieu of paying the monthly facilities charge for each excess circuit.
4. For a metal pole, 2% of the estimated installed cost of overhead or underground metal poles requiring special construction or features which are in excess of the estimated installed cost of standard underground metal poles will be charged to the customer as outlined in the Customer Service Policies section regarding additional facilities.
5. When more energy-efficient and better-suited lighting becomes available to the City, they will be made available for use under this Schedule. The appropriate charges for such units will be developed by the City Electric Utility Department. Said charges are to be incorporated by amendment to this Schedule by the City.

NON-REFUNDABLE CONTRIBUTION

1. In the event that rock, unstable soil, or other conditions require the use of materials and methods of installation other than City's normal materials and methods, customer will contribute the additional cost incurred thereby.
2. Customer will contribute the estimated cost of installing cables under paved or landscaped surface areas; however, Customer may cut and replace the pavement or surface in lieu of making the contribution.
3. Service supplied under the Monthly Rate in this Schedule does not include the conversion of existing overhead street-lighting circuits to underground. Should the customer desire such a conversion under this Schedule, customer will pay to the City, in addition to the applicable contribution and charges herein, the estimated net investment depreciated, plus removal cost, less salvage value the overhead conductor being removed.

SALES TAX

To the above charges will be added any applicable North Carolina sales tax.

PAYMENT

Bills are due and payable no later than the due date reflected on the bill, which shall be no earlier than twenty (20) days from the date of the bill. If any bill is not so paid, the City has the right to suspend service in accordance with its service regulations.

CONTRACT

The Contract Period shall not be less than 10 years.

PERIOD

GENERAL

Service rendered under this Schedule is subject to the provisions of City's Street Lighting Service Regulations filed at City Hall.

SECTION 24. That the foregoing ordinance be kept on file in the Office of the City Clerk.

SECTION 25. That previous ordinances in conflict with this ordinance are hereby replaced.

SECTION 26. That the rates established by this Ordinance shall be in full force and effect on July 1, 2024

ADOPTED THIS 25th DAY OF JUNE, 2024.

JEFFREY T. ODHAM, MAYOR

BRENDA E. BLANCO, CITY CLERK

AN ORDINANCE TO ADOPT A POWER COST ADJUSTMENT RIDER APPLICABLE TO THE ELECTRIC RATE ORDINANCE FOR THE CONSUMPTION OF ELECTRICITY AND CUSTOMERS OF THE CITY OF NEW BERN

BE IT ORDAINED BY THE BOARD OF ALDERMEN OF THE CITY OF NEW BERN:

SECTION 1. That there are hereby established a Power Cost Adjustment Rider for the consumption of energy to be charged to electric utility customers of the City of New Bern effective **July 1, 2024**, summarized as follows:

Power Cost Adjustment Rider – Schedule Rider No. 1	Rate
Power Cost Adjustment – PCA (per kWh)	\$.0033*

*See Section 2 below, Power Cost Adjustment Rider, Schedule Rider No. 1, for formula

SECTION 2:

CITY OF NEW BERN
Power Cost Adjustment Rider
Schedule Rider No. 1

AVAILABILITY

The Power Cost Adjustment (PCA) is a charge that is applied to all metered rate schedules set forth in this Ordinance to recover purchased power supply cost not recovered by the rate schedules.

DEFINITIONS

A. Purchased Power Cost (PPC) means the total cost of purchased energy over a rolling twelve-month period divided by total purchased energy for the same period. The PPC is calculated monthly for the period ending two months in arrears, and is expressed in dollars per kWh.

Formula: $PPC = (NCEMPA \text{ Cost} + SEPA \text{ Cost}) / (NCEMPA \text{ Purchased kWh} + SEPA \text{ Purchased kWh})$

Example calculation:

Assume total cost of purchased power supply for 12-month period ending 2 months earlier = \$37,746,929
(NCEMPA \$37,593,289 + SEPA \$153,640 = \$37,746,929)

Assume total purchased energy for same period = 478,080,669 kWh
(NCEMPA 477,165,422 kWh + SEPA 915,247 kWh = 478,080,669 kWh)

$PPC = \$37,746,929 / 478,080,669 \text{ kWh} = \$0.0790/\text{kWh}$

B. System Lost Energy (SLE) means the total purchased energy over a rolling twelve-month period less Retail Energy Available to Sell (REAS) for the same period and is expressed in kWh.

Formula: $SLE = (NCEMPA \text{ Purchased kWh} + SEPA \text{ Purchased kWh}) - REAS$

Example calculation:

Assume total purchased energy for 12-month period ending 2 months earlier = 478,080,669 kWh (NCEMPA 477,165,422 kWh + SEPA 915,247 kWh = 478,080,669 kWh)

Assume Retail Energy Available to Sell for same period = 448,387,107 kWh

SLE = 478,080,669 kWh – 448,387,107 kWh = 29,693,562 kWh

C. System Lost Energy Adjustment Factor (SLEAF) means System Lost Energy divided by the total purchased energy for the same period and expressed as a ratio.

Formula: $SLEAF = SLE / (NCEMPA \text{ Purchased kWh} + SEPA \text{ Purchased kWh})$

Example calculation using assumptions above:

$SLEAF = 29,693,562 \text{ kWh} / 478,080,669 \text{ kWh} = 0.0621$

D. Adjusted Purchased Power Cost (APPC) means the Purchased Power Cost divided by the quantity one less the System Loss Energy Adjustment Factor, and is expressed in dollars per kWh.

Formula: $APPC = PPC / (1 - SLEAF)$

Example calculation using assumptions above:

$APPC = 0.0790 / (1 - 0.0621) = \$0.0842/\text{kWh}$

E. Base Wholesale Power Cost (BWPC) means \$0.0809. The BWPC may be adjusted from time to time by the Board of Aldermen.

APPLICATION

The PCA shall be applied to all kWh of energy billed to customers under all metered rate schedules set forth in this Ordinance, and shall be calculated consistent with the following PCA formula:

Formula: $PCA = APPC - BWPC$

Example calculation using assumptions above:

$PCA = \$0.0842/\text{kWh} - \$0.0809/\text{kWh} = \$0.0033/\text{kWh}$

The PCA shall be calculated and billed monthly, lagging actual power supply sales and expenses by two months, and shall appear as an additional charge on each customer's electric utility bill.

* The PCA shall be calculated using four (4) decimal rounding precision throughout all definitions.

SECTION 3. That the foregoing ordinance be kept on file in the Office of the City Clerk.

SECTION 4. That previous ordinances in conflict with this ordinance are hereby replaced.

SECTION 5. That the rates established by this Ordinance shall be in full force and effect on July 1, 2024.

ADOPTED THIS 25th DAY OF JUNE, 2024.

JEFFREY T. ODHAM, MAYOR

BRENDA E. BLANCO, CITY CLERK

**AN ORDINANCE TO ADOPT A REVENUE RECONCILIATION ADJUSTMENT RIDER
APPLICABLE TO THE ELECTRIC RATE ORDINANCE FOR THE CONSUMPTION OF
ELECTRICITY AND CUSTOMERS OF THE CITY OF NEW BERN**

BE IT ORDAINED BY THE BOARD OF ALDERMEN OF THE CITY OF NEW BERN:

SECTION 1. That there are hereby established a Revenue Reconciliation Adjustment Rider for, the consumption of energy to be charged to electric utility customers of the City of New Bern effective **July 1, 2024**, summarized as follows:

Revenue Reconciliation Adjustment – Schedule Rider No. 2	Rate
Revenue Reconciliation Adjustment – RRA (per kWh)	\$.0061

SECTION 2:

CITY OF NEW BERN
Revenue Reconciliation Adjustment
Schedule Rider No. 2

AVAILABILITY

The Revenue Reconciliation Adjustment (RRA) is a charge that is applied to all metered rate schedules to recover costs not recovered by any of the other rates or riders.

DEFINITIONS

Revenue Reconciliation Adjustment (RRA) means a fixed cost of \$0.0061 per kWh multiplied by the total energy used during the billing period.

APPLICATION

The RRA shall be applied to all kWh of energy billed to the customer under all metered rate schedules set forth in this Ordinance, and shall be calculated consistent with the RRA formula.

Formula: $RRA = \$0.0061/kWh \times \text{Monthly Billed kWh}$

Example calculation:

Assume customer's billable usage is 997 kWh for the current monthly billing cycle.

$RRA = \$0.0061/kWh \times 997 \text{ kWh} = \6.08

The RRA shall appear as an additional charge on each customer's electric utility bill.

The RRA maybe periodically reviewed and adjusted by the Board of Alderman.

SECTION 4. That the foregoing ordinance be kept on file in the Office of the City Clerk.

SECTION 5. That previous ordinances in conflict with this ordinance are hereby replaced.

SECTION 6. That the rates established by this Ordinance shall be in full force and effect on July 1, 2024.

ADOPTED THIS 25th DAY OF JUNE, 2024.

JEFFREY T. ODHAM, MAYOR

BRENDA E. BLANCO, CITY CLERK



City of New Bern
Board of Aldermen
June 25, 2024
Electric Rate Adjustment

1

Why Do We Need A Rate Plan?

- Purchased Power Supply Cost
70% of the Electric Budget
\$3M annual increase impacting FYE 2024 and 25
Power supply cost forecasted to continue to rise
- Rate Stabilization Fund Depleted
- Electric Fund Balance
Below 90 day cash-on-hand policy; ~ 40 days
Negative cash balance projected by Mid FY 2026
Industry cash-on-hand standards; 120 days minimum, 200 days goal
- Inflation 18 – 900%; All goods and services

2

Why Do We Need A Rate Plan?

- Rates lowered in 2015,16 and 17; Total 17.5% Decrease
- System Age
 - Net book value; 39% , depreciated system
 - Requires system improvements
 - Can not support N-1 contingencies
 - Limited capability to prevent disruptions and interruptions
 - Limited capability to reroute power to distressed communities
- Capital Needs
 - Additional capacity in substations, wire and hardware
 - 3 substation transformers , 50 years old, beyond useful life
 - Generation fleet beyond useful life of 20 yrs
 - Grant request – Asking \$49M, Matching \$13.3 M

Proposed Rate Plan

Rates – 5% overall increase; FYE 25, 26 and 27

Power Supply Cost Recovery

Rider 1: Power Cost Adjustment; recovers
current power costs not recovered by rates

Rider 2: Revenue Reconciliation Adjustment; recovers
previous power costs not recovered by rates

Annually Review and Adjust

Alternate Rate Plan

Rates –

- FYE 25 - Overall 18% increase
- FYE 26 - Overall 0% increase
- FYE 27 - Overall 4% increase

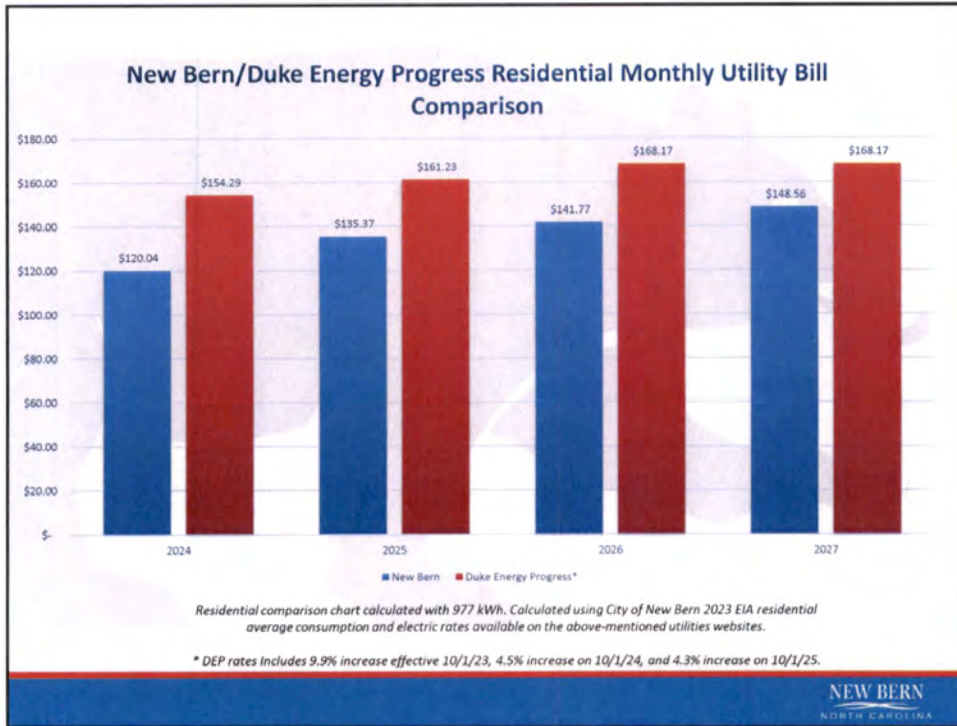
Annually Review and Adjust

5

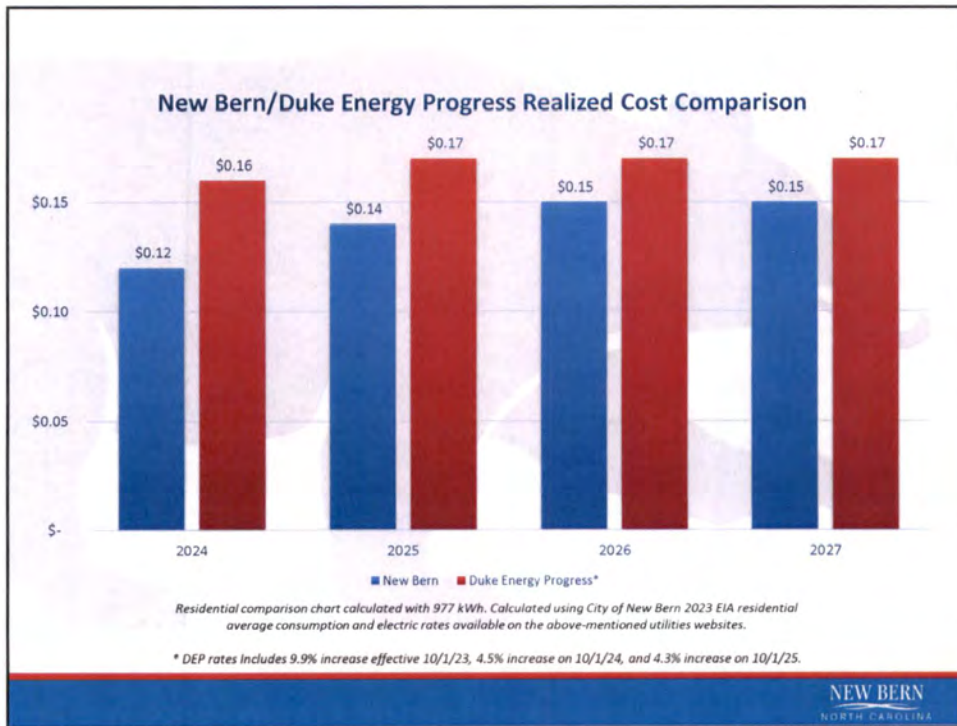
Impact On Typical Residential Customer

New Bern Recommended Rate Plan	FYE 2024	FYE 2025	FYE 2026	FYE 2027
Rate Adjustment (%)		5%	5%	5%
Power Cost Adjustment (\$/kWh) (Variable)		\$ 0.0033	\$ 0.0033	\$ 0.0033
Revenue Reconciliation Adjustment (\$/kWh) (Fixed)		\$ 0.0061	\$ 0.0061	\$ 0.0061
Typical Residential Monthly (\$)	\$ 120.04	\$ 135.37	\$ 141.77	\$ 148.56
Realized Cost (\$/kWh)	\$ 0.12	\$ 0.14	\$ 0.15	\$ 0.15

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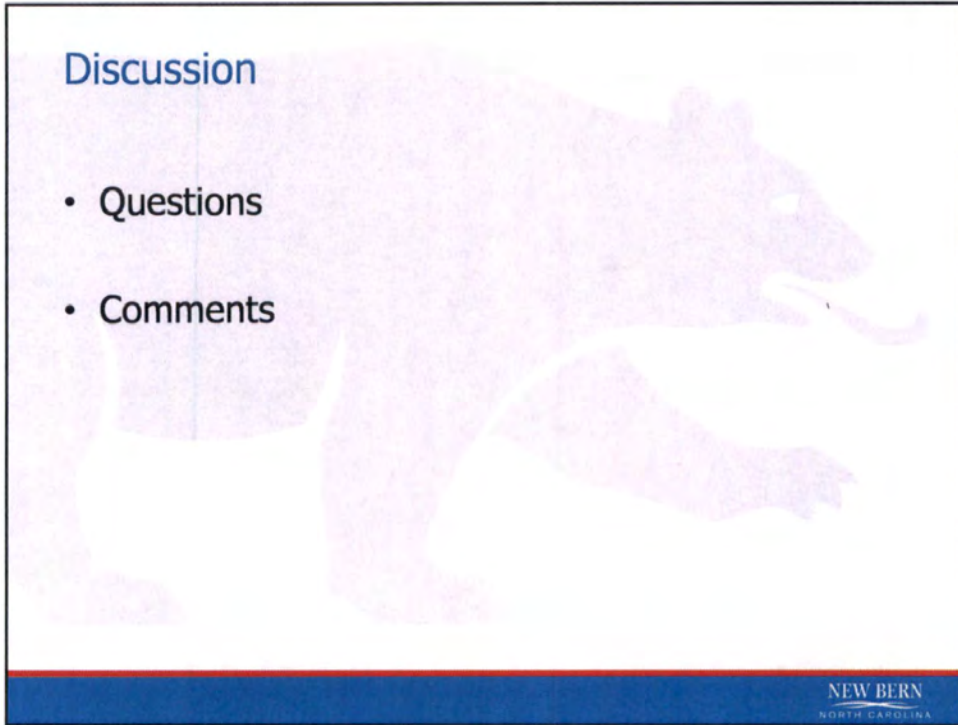
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Discussion

- Questions
- Comments





City of New Bern
Board of Aldermen Workshop
May 22, 2024
Electric Financial Report and Rate Plan

1

Director remarks / Introduction

- Provide – Essential electric service:
Safe, affordable, reliable and resilient
- Protect - Investment in the electrical utility
- Ensure – Electric utility is financially healthy

2

Director remarks / Introduction

- Perform electric utility financial study
- Consider the findings of the study
- Utility Financial Solutions, LLC

3

Director remarks / Introduction

- Determine - Projected revenues
- Develop – 3 Yr rate plan w/revenue requirements
- Design – Rates supporting revenue requirements
 - Rates w/operating & capital revenue requirements
 - Rates with variable power supply revenue requirements

4

Director remarks / Revenue requirements

- Fixed Revenue Requirements

Power Supply – Increasing, Variable, Contractual,
>60 % of all Expenses

Sales – Flat, Variable, Weather, Territory

Cash Balance – Declining, Policy

General Fund – Increasing contributions, Policy

Debt Service – Increasing, Contractual

Director remarks / Revenue requirements

- Fixed Revenue Requirements

Mandates – Increasing
Safety
Training and Education
NCDOT Utility Relocations,
Broadband Service Providers
Utility Locates

Labor & Benefits – Increasing; system growth, inflation

Inflation – Increasing, 18-900%

Director remarks / Revenue requirements

- Variable Revenue Requirements

Severe Weather – Assessment and response to events

Outages - Detection, isolation and response to events

Metering – Accuracy

Billing – Timely

Customer Service – Walk-In service, multiple payment options, after hours service

Customer Engagement – Outage notification, Community events

NEW BERN
NORTH CAROLINA

7

Director remarks / Revenue requirements

- Variable Revenue Requirements

System Age – Useful life, preventive maintenance, repairs

Growth -

Line extension policy; under collecting

Territorial expansion; labor, material and equipment

System capacity requirements and limitations

Labor – Qualified, succession planning, experience, training, retainable, market competition

NEW BERN
NORTH CAROLINA

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Director remarks / Forecasted pressures

- Weather events
- Declining cash reserves
- Increasing power supply cost
- System Age –
 - Increasing capital spending
 - Decreasing power supply cost avoidance
 - Substation transformers – 50 Yr (end of useful life)
 - Generation fleet – 20 Yr (end of useful life)
 - Distribution system – > 50 Yr (continuous repair)

Director Remarks / Forecasted Pressures

- Reliability / Resiliency / Contingencies
 - Customer Expectations
 - Can not support N-1 contingencies
 - Minimal capabilities to prevent disruptions and interruptions
 - Minimal capability to reroute power to distressed communities
- Mandates
 - Carbon reduction
 - EV charging
- Grip Grant - \$47.9 M ; \$34.9 M Federal ; \$13M Local
- Power Up grant - \$1.0 M ; \$666,667 NC DEQ ; \$333,333 Local

Utility Financial Solutions, LLC

- Financial Report
- Recommended Rate Plan

Director Remarks / Closing Remarks

- Recommend Adopting
 - 3 yr rate plan
 - 5% increase – FYE 25
 - 5% increase – FYE 26
 - 5 % increase – FYE 27

PCA methodology

Annually review and adjustment

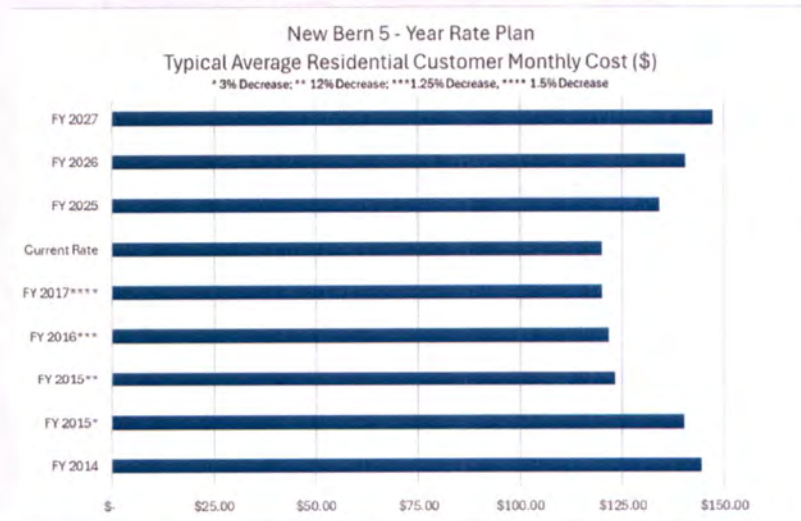
Director Remarks / Closing Remarks

Rate Plan – Impact on Typical Residential Customer

New Bern Recommended Rate Plan	FYE 2024	FYE 2025	FYE 2026	FYE 2027
Rate Adjustment (%) (Fixed)		5%	5%	5%
Power Cost Adjustment (\$/kWh) Variable		\$0.0081	\$0.0081	\$0.0081
Typical Residential Monthly (\$)	\$ 120.04	\$ 134.10	\$ 140.50	\$ 147.29
Realized Cost (\$/kWh)	\$ 0.12	\$ 0.14	\$ 0.14	\$ 0.15

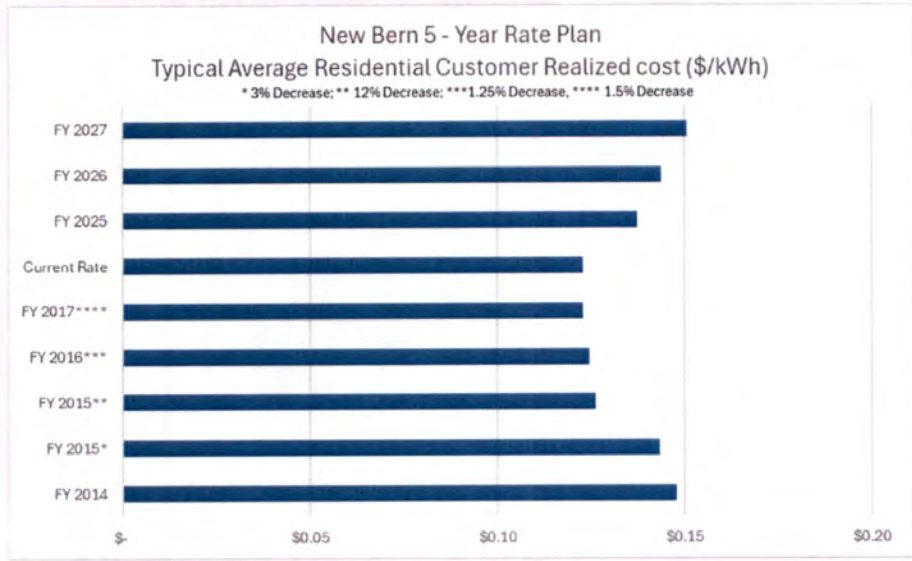
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Director Remarks / Closing Remarks



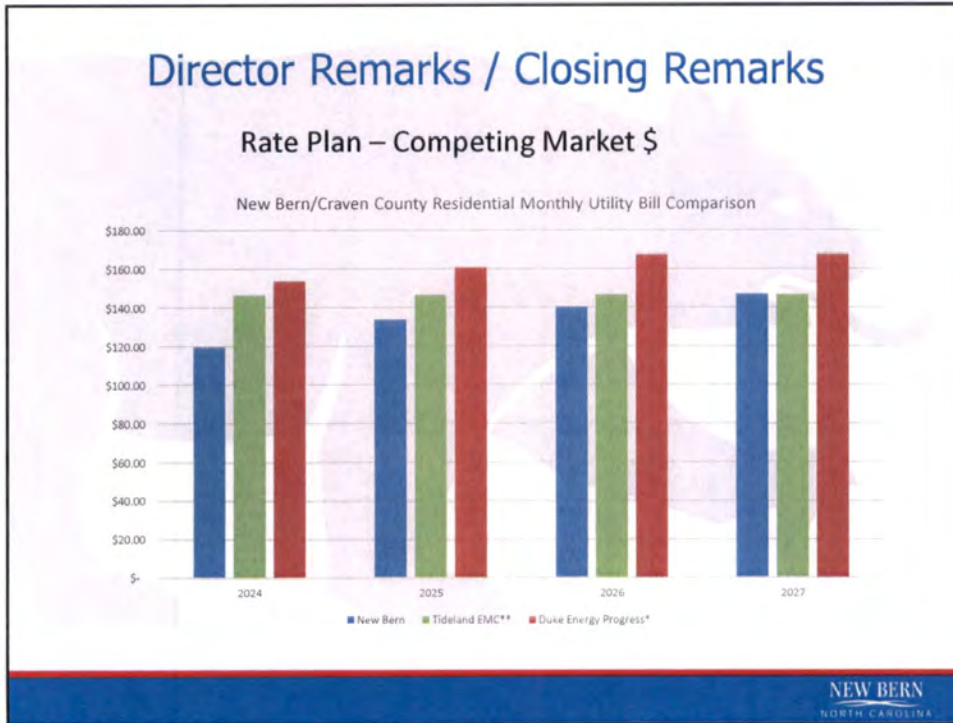
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Director Remarks / Closing Remarks



15

Director Remarks / Closing Remarks

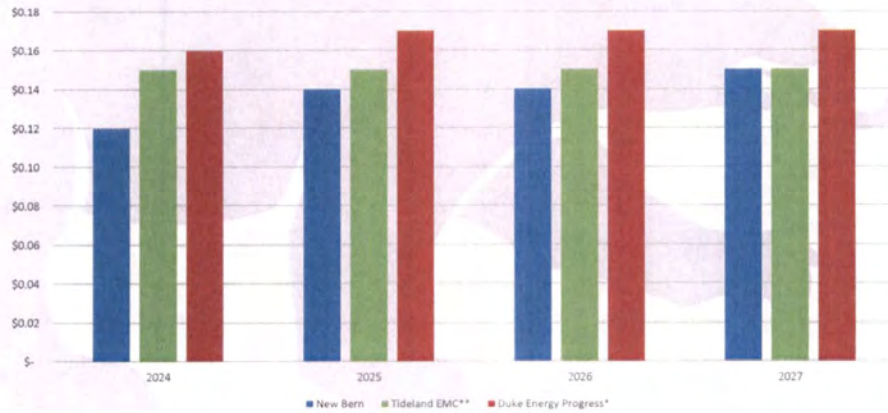


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Director Remarks / Closing Remarks

Rate Plan – Competing Market \$/KWh

New Bern/Craven County Realized Cost Comparison



NEW BERN
NORTH CAROLINA

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Director Remarks / Closing Remarks

- Questions
- Comments

NEW BERN
NORTH CAROLINA

18

AN ORDINANCE TO AMEND AND RESTATE THE RATES FOR THE CONSUMPTION OF ELECTRICITY APPLICABLE TO CUSTOMERS OF THE CITY OF NEW BERN

BE IT ORDAINED BY THE BOARD OF ALDERMEN OF THE CITY OF NEW BERN:

SECTION 1. That there are hereby established rates for, the consumption of energy to be charged to electric utility customers of the City of New Bern ~~effective~~ ~~effective~~ **May 14 July 1, 2024**, summarized as follows:

Residential – Schedule 01		Rate		
Customer Charge (Per Month)		\$9.95		
Energy (Per kWh) First 300 kWh		\$0.1018		
Energy (Per kWh) All additional kWh		\$0.1175		
Three Phase Charge (In addition to monthly customer charge, if applicable)		\$13.67		
Residential – Schedule 01		Rate		
<i>Effective Date</i>		<i>7/1/2024</i>	<i>7/1/2025</i>	<i>7/1/2026</i>
Customer Charge (per month)		\$12.00	\$14.00	\$16.00
Energy Charge (per kWh) First 300 kWh		\$0.1060	\$0.1105	\$0.1154
Energy Charge (per kWh) All additional kWh		\$0.1217	\$0.1262	\$0.1311
Three Phase Charge (in addition to Customer Charge, if applicable)		\$14.35	\$15.05	\$15.80

Residential – Schedule 07		Rate		
Customer Charge (Per Month)		\$9.95		
Energy (Per kWh) First 300 kWh		\$0.0968		
Energy (Per kWh) All additional kWh		\$0.1116		
Three Phase Charge (In addition to monthly customer charge, if applicable)		\$13.67		

Residential – Schedule 07		Rate		
<i>Effective Date</i>		<i>7/1/2024</i>	<i>7/1/2025</i>	<i>7/1/2026</i>
Customer Charge (per month)		\$12.00	\$14.00	\$16.00
Energy Charge (per kWh) First 300 kWh		\$0.1007	\$0.1050	\$0.1096
Energy Charge (per kWh) All additional kWh		\$0.1156	\$0.1199	\$0.1245
Three Phase Charge (in addition to Customer Charge, if applicable)		\$14.35	\$15.05	\$15.80

Small General Service #1 Schedule 03		Rate		
Customer Charge (Per Month)		\$20.64		
Energy (Per kWh) First 2325 kWh		\$0.1260		
Energy (Per kWh) Next 1000 kWh		\$0.0960		
Energy (Per kWh) All over 3325 kWh		\$0.0900		
Three Phase Charge (In addition to monthly customer charge, if applicable)		\$13.67		

Small General Service #1 – Schedule 03		Rate		
<i>Effective Date</i>		<i>7/1/2024</i>	<i>7/1/2025</i>	<i>7/1/2026</i>
Customer Charge (per month)		\$25.00	\$29.50	\$34.00

Commercial Electric Vehicle Charging Station CP Schedule 14	Rate
Customer Charge (Per Month)	\$166.06
CP Demand (Per kW)	\$26.84
Excess Demand (Per kW)	\$4.43
Energy (per kWh) LF <=10%	\$0.10100
Energy (per kWh) 10% <LF <20%	\$0.07855
Energy (per kWh) LF>20%	\$0.05610

Commercial Electric Vehicle Charging Station CP – Schedule 14	Rate		
<i>Effective Date</i>	<u>7/1/2024</u>	<u>7/1/2025</u>	<u>7/1/2026</u>
Customer Charge (per month)	\$175.00	\$184.00	\$193.00
Coincidental Peak Demand Charge (per kW)	\$27.00	\$27.75	\$28.50
Excess Demand Charge (per kW)	\$6.00	\$6.75	\$7.50
Energy Charge (per kWh) Load Factor <=10%	\$0.1018	\$0.1040	\$0.1064
Energy Charge (per kWh) 10%< Load Factor <20%	\$0.0793	\$0.0815	\$0.0839
Energy Charge (per kWh) Load Factor >20%	\$0.0568	\$0.0590	\$0.0614

Utility Owned Electric Vehicle Charging Station Schedule 15	Rate
Active Energy (per kWh) LF < 10%	\$0.68
Active Energy (per kWh) 10%<LF<20%	\$0.47
Active Energy (per kWh) LF>20%	\$0.38
In Active Charging (per minute)	\$0.17

Utility Owned Electric Vehicle Charging Station – Schedule 15	Rate		
<i>Effective Date</i>	<u>7/1/2024</u>	<u>7/1/2025</u>	<u>7/1/2026</u>
Active Energy Charge (per kWh) Load Factor <10%	\$0.7100	\$0.7500	\$0.7900
Active Energy Charge (per kWh) 10%< Load Factor <20%	\$0.4900	\$0.5100	\$0.5400
Active Energy Charge (per kWh) Load Factor >20%	\$0.4000	\$0.4200	\$0.4400
In Active Charging Charge (per minute)	\$0.1800	\$0.1900	\$0.2000

Medium General Service #1 Schedule 08	Rate
Customer Charge (Monthly)	\$22.80
Demand (Per kW)	\$8.08
Energy (Per kWh)	\$0.0842

Medium General Service #1 – Schedule 08	Rate		
<i>Effective Date</i>	<u>7/1/2024</u>	<u>7/1/2025</u>	<u>7/1/2026</u>
Customer Charge (per month)	\$27.00	\$31.50	\$36.00
Demand Charge (per kW)	\$9.00	\$9.75	\$10.50
Energy Charge (per kWh)	\$0.0863	\$0.0893	\$0.0926
Three Phase Charge (in addition to Customer Charge, if applicable)	\$14.35	\$15.05	\$15.80

Small Wholesale Schedule 09	Rate
Customer Charge (Per Month)	\$21.78

Demand (Per kW)	\$6.69
Energy (Per kWh)	\$0.0859
Three Phase Charge (In addition to monthly Customer Charge, if applicable)	\$13.67

Small Wholesale – Schedule 09	Rate		
	<i>Effective Date</i>		
	<u>7/1/2024</u>	<u>7/1/2025</u>	<u>7/1/2026</u>
Customer Charge (per month)	\$27.00	\$33.00	\$39.00
Demand Charge (per kW)	\$7.00	\$7.75	\$8.50
Energy Charge (per kWh)	\$0.0870	\$0.0856	\$0.0846
Three Phase Charge (in addition to Customer Charge, if applicable)	\$14.35	\$15.05	\$15.80

Large General Service #2 CP Rate Schedule 6	Rate
Customer Charge (Per Month)	\$1,214.06
CP Demand (Per kW) – First 3200 kW	\$26.84
Demand (Per kW) – All additional kW	\$14.94
Excess Demand (Per kW)	\$4.19
Energy (Per kWh) – First 1,700,000 kWh	\$0.0529
Energy (Per kWh) – All additional kWh	\$0.0445

Large General Service #2 CP – Schedule 06	Rate		
	<i>Effective Date</i>		
	<u>7/1/2024</u>	<u>7/1/2025</u>	<u>7/1/2026</u>
Customer Charge (per month)	\$1,250.00	\$1,285.00	\$1,320.00
Coincidental Peak Demand Charge (per kW) First 3200 kW	\$27.00	\$27.75	\$28.50
Demand Charge (per kW) All Additional kW	\$27.00	\$27.75	\$28.50
Excess Demand Charge (per kW)	\$6.00	\$6.75	\$7.50
Energy Charge (per kWh) First 1,700,000 kWh	\$0.0529	\$0.0543	\$0.0564
Energy Charge (per kWh) All additional kWh	\$0.0445	\$0.0543	\$0.0564

Medium General Service #2 Schedule 10	Rate
Customer Charge (Per Month)	\$22.80
Demand (Per kWh)	\$8.95
Energy (Per kWh)	\$0.0800
Three Phase Charge (In addition to monthly Customer Charge, if applicable)	\$13.67

Medium General Service #2 – Schedule 10	Rate		
	<i>Effective Date</i>		
	<u>7/1/2024</u>	<u>7/1/2025</u>	<u>7/1/2026</u>
Customer Charge (per month)	\$27.00	\$31.50	\$36.00
Demand Charge (per kW)	\$9.75	\$10.50	\$11.25
Energy Charge (per kWh)	\$0.0829	\$0.0862	\$0.0898
Three Phase Charge (in addition to Customer Charge, if applicable)	\$14.35	\$15.05	\$15.80

Medium General Service TOU Schedule 11	Rate
Customer Charge (Per Month)	\$56.78
On Peak Demand (Per kW)	\$21.57
Excess Demand (Per kW)	\$5.19

Energy (Per kWh)	\$0.0592
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Medium General Service TOU – Schedule 11		Rate		
<i>Effective Date</i>		<i>7/1/2024</i>	<i>7/1/2025</i>	<i>7/1/2026</i>
Customer Charge (per month)		\$60.00	\$63.00	\$66.00
On Peak Demand Charge (per kW)		\$27.00	\$27.75	\$28.50
Excess Demand Charge (per kW)		\$6.00	\$6.75	\$7.50
Energy Charge (per kWh)		\$0.0606	\$0.0630	\$0.0655

Medium General Service CP Schedule 12		Rate		
Customer Charge (Per Month)		\$82.24		
CP Demand (Per kW)		\$22.12		
Excess Demand (Per kW)		\$5.24		
Energy (Per kWh)		\$0.0601		

Medium General Service CP – Schedule 12		Rate		
<i>Effective Date</i>		<i>7/1/2024</i>	<i>7/1/2025</i>	<i>7/1/2026</i>
Customer Charge (per month)		\$90.00	\$97.50	\$105.00
Coincidental Peak Demand Charge (per kW)		\$27.00	\$27.75	\$28.50
Excess Demand Charge (per kW)		\$6.00	\$6.75	\$7.50
Energy Charge (per kWh)		\$0.0607	\$0.0630	\$0.0655

Residential – Schedule 40		Rate		
Customer Charge (Per Month)		\$9.95		
Energy (Per kWh) – First 300 kWh		\$0.1018		
Energy (Per kWh) – 300 kWh to 800 kWh		\$0.1175		
Energy (Per kWh) – All additional kWh		\$0.1013		
Three Phase Charge (In addition to monthly Customer Charge, if applicable)		\$13.67		

Residential – Schedule 40		Rate		
<i>Effective Date</i>		<i>7/1/2024</i>	<i>7/1/2025</i>	<i>7/1/2026</i>
Customer Charge (per month)		\$12.00	\$14.00	\$16.00
Energy Charge (per kWh) First 300 kWh		\$0.1060	\$0.1105	\$0.1154
Energy Charge (per kWh) 300 kWh to 800 kWh		\$0.1217	\$0.1262	\$0.1311
Energy Charge (per kWh) All additional kWh		\$0.1026	\$0.1044	\$0.1065
Three Phase Charge (in addition to customer charge, if applicable)		\$14.35	\$15.05	\$15.80

Residential – Schedule 50		Rate		
Customer Charge (Per Month)		\$9.95		
Energy (Per kWh) – First 300 kWh		\$0.0968		
Energy (Per kWh) – 300 kWh to 800 kWh		\$0.1116		
Energy (Per kWh) – All additional kWh		\$0.0948		
Three Phase Charge (In addition to monthly Customer Charge, if applicable)		\$13.67		

<u>Residential – Schedule 50</u>	<u>Rate</u>		
	<u>7/1/2024</u>	<u>7/1/2025</u>	<u>7/1/2026</u>
<u>Effective Date</u>			
<u>Customer Charge (per month)</u>	<u>\$12.00</u>	<u>\$14.00</u>	<u>\$16.00</u>
<u>Energy Charge (per kWh) First 300 kWh</u>	<u>\$0.1007</u>	<u>\$0.1050</u>	<u>\$0.1096</u>
<u>Energy Charge (per kWh) 300 kWh to 800 kWh</u>	<u>\$0.1156</u>	<u>\$0.1199</u>	<u>\$0.1245</u>
<u>Energy Charge (per kWh) All additional kWh</u>	<u>\$0.0940</u>	<u>\$0.0936</u>	<u>\$0.0935</u>
<u>Three Phase Charge (in addition to customer charge, if applicable)</u>	<u>\$14.35</u>	<u>\$15.05</u>	<u>\$15.80</u>

<u>Extra Facilities Charge – Generation Schedule 70</u>	<u>Rate</u>
<u>Facilities Charge – Per kW based on Generator Nameplate Rating</u>	<u>\$2.96</u>

<u>Extra Facilities Charge Generation – Schedule 70</u>	<u>Rate</u>		
	<u>7/1/2024</u>	<u>7/1/2025</u>	<u>7/1/2026</u>
<u>Effective Date</u>			
<u>Facilities Charge (per kW) based on Generator Nameplate Rating</u>	<u>\$2.96</u>	<u>\$2.96</u>	<u>\$2.96</u>

<u>Renewable Resource Facilities Credit Schedule 60</u>	<u>Rate</u>
<u>Energy – Credit Per kW generated</u>	<u>\$0.0487</u>

<u>Renewable Resource Facilities Credit – Schedule 60</u>	<u>Rate</u>		
	<u>7/1/2024</u>	<u>7/1/2025</u>	<u>7/1/2026</u>
<u>Effective Date</u>			
<u>Energy Credit (per kW generated)</u>	<u>\$0.0487</u>	<u>\$0.0487</u>	<u>\$0.0487</u>

<u>Commercial/Industrial Load Profiler Data Service – Schedule LPDS</u>	<u>Rate</u>
<u>Set Up Fee</u>	<u>\$150.00</u>
<u>Monthly Rate</u>	<u>\$40.50</u>
<u>Monthly Rate</u>	<u>\$90.00</u>

<u>Unmetered Service – Schedule UMS</u>	<u>Rate</u>
<u>Customer Charge (Per Month)</u>	<u>\$20.65</u>
<u>Wattage rating of 10W or less</u>	<u>\$0.90</u>
<u>Wattage rating of 11W but not greater than 50W</u>	<u>\$1.90</u>
<u>Wattage rating of 51 but not greater that 100W</u>	<u>\$3.80</u>

<u>Commercial/Industrial Load Profiler Data Service – Schedule LPDS</u>	<u>Rate</u>		
	<u>7/1/2024</u>	<u>7/1/2025</u>	<u>7/1/2026</u>
<u>Effective Date</u>			
<u>Set Up Fee</u>	<u>\$157.50</u>	<u>\$165.40</u>	<u>\$173.65</u>
<u>Day After Data Service Charge (per month)</u>	<u>\$42.50</u>	<u>\$44.65</u>	<u>\$46.90</u>
<u>Same Day Hourly Data Service Charge (per month)</u>	<u>\$94.50</u>	<u>\$99.25</u>	<u>\$104.20</u>

<u>Unmetered Service – Schedule UMS</u>	<u>Rate</u>		
	<u>7/1/2024</u>	<u>7/1/2025</u>	<u>7/1/2026</u>
<u>Effective Date</u>			
<u>Customer Charge (per month)</u>	<u>\$25.00</u>	<u>\$29.50</u>	<u>\$34.00</u>
<u>Wattage Rating of 10w or less</u>	<u>\$.95</u>	<u>\$.99</u>	<u>\$1.04</u>

Wattage Rating of 11w but not greater than 50w	\$2.00	\$2.10	\$2.20
Wattage Rating of 51w but not greater than 100w	\$3.99	\$4.19	\$4.40

Area Lighting Schedule 04		New Rate
High Pressure Sodium		
Monthly Rate	150w (Obsolete - Not Available for new or replacement service)	\$18.74
Monthly Rate	250w (Obsolete - Not Available for new or replacement service)	\$21.32
Metal Halide		
Monthly Rate	400w (Obsolete - Not Available for new or replacement service)	\$33.15
Monthly Rate	1000w (Obsolete - Not Available for new or replacement service)	\$44.60
LED		
Monthly Rate	50w	\$18.74
Monthly Rate	300w	\$33.15
Area Lighting Poles		
Monthly Rate	Wood	\$2.93
Monthly Rate	Special Metal or Fiberglass Post	\$6.94
Underground Service		
	One time contribution per pole	\$246.51
Monthly Rate	Increase per pole	\$4.90

Area Lighting – Schedule 04	Rate		
	7/1/2024	7/1/2025	7/1/2026
<i>Effective Date</i>			
<u>Overhead Service</u>			
<i>Mercury Vapor (Obsolete – Not available for new or replacement)</i>			
175 w semi enclosed (per month)	\$11.95	\$12.55	\$13.20
175w (per month)	\$13.95	\$14.65	\$15.40
1000w Flood (per month)	\$46.85	\$49.20	\$51.65
<i>Sodium Vapor (Obsolete – Not available for new or replacement)</i>			
100w (per month)	\$15.90	\$16.70	\$17.55
150w (per month)	\$19.70	\$20.70	\$21.75
250w Flood (per month)	\$22.40	\$23.50	\$24.70
400w Flood (per month)	\$34.80	\$36.55	\$38.40
<i>Metal Halide (Obsolete – Not available for new or replacement)</i>			
Cobra Head 500w (per month)	\$34.80	\$36.55	\$38.40
1000w Flood (per month)	\$46.85	\$49.20	\$51.65
<i>LED</i>			
50w (per month)	\$19.70	\$20.70	\$21.75
300w Flood (per month)	\$34.80	\$36.55	\$38.40
<u>Underground Service</u>			
<i>Area Lighting Poles</i>			
Wood per pole (per month)	\$3.10	\$3.25	\$3.40
Special Metal or Fiberglass per pole (per month)	\$7.30	\$7.65	\$8.05
<i>Underground Service</i>			
One Time Contribution	\$258.84	\$271.78	\$285.37
Increase per pole (per month)	\$5.15	\$5.40	\$5.65

Street Lighting Poles		Rate
Monthly Rate	Wood	\$2.01
Monthly Rate	Special Metal or Fiberglass Post	\$3.51
	Underground Service	
	One Time Contribution per pole	\$246.51
Monthly Rate	Increase Per Pole	\$4.90

Street Lighting Service Schedule 32-A		Rate
	<i>Mercury Vapor</i>	
Monthly Rate	175w semi enclosed (Obsolete not available for new or replacement service)	\$8.44
Monthly Rate	175w (Obsolete not available for new or replacement service)	\$8.44
Monthly Rate	400w (Obsolete not available for new or replacement service)	\$13.18
	<i>Metal Halide</i>	
Monthly Rate	400w (Obsolete not available for new or replacement service)	\$13.18
Monthly Rate	1000w (Obsolete not available for new or replacement service)	\$14.47
	<i>High Pressure Sodium</i>	
Monthly Rate	100w (Obsolete not available for new or replacement service)	\$7.79
Monthly Rate	150w (Obsolete not available for new or replacement service)	\$8.44
Monthly Rate	250w (Obsolete not available for new or replacement service)	\$10.77
Monthly Rate	400w (Obsolete not available for new or replacement service)	\$13.18

Monthly Rate	400w (Obsolete not available for new or replacement service) LED	\$14.47
Monthly Rate	39w Acorn	\$18.81
Monthly Rate	72w Cobra	\$12.46
Monthly Rate	110w Town & Country	\$17.62
Monthly Rate	160w Gardeo	\$38.85

Street Lighting Service – Schedule 32-A	Rate			
	Effective Date	7/1/2024	7/1/2025	7/1/2026
<i>Mercury Vapor (Obsolete not available for new or replacement)</i>				
175w (per month)		\$8.85	\$9.30	\$9.75
<i>Metal Halide (Obsolete not available for new or replacement)</i>				
400w Flood (per month)		\$13.85	\$14.55	\$15.30
1000w Flood (per month)		\$15.20	\$15.95	\$16.75
<i>Sodium Vapor (Obsolete not available for new or replacement)</i>				
100w (per month)		\$8.20	\$8.60	\$9.05
150w (per month)		\$8.85	\$9.30	\$9.75
250w (per month)		\$11.30	\$11.85	\$12.45
400w (per month)		\$13.85	\$14.55	\$15.30
<i>LED</i>				
39w – Acorn (per month)		\$19.75	\$20.75	\$21.80
70w – Cobra (per month)		\$13.10	\$13.75	\$14.45
110w – Town & Country (per month)		\$18.50	\$19.45	\$20.40
160w – Gardco (per month)		\$40.80	\$42.85	\$33.35

Street Lighting Service Schedule 32-B	Rate	
Overhead Distribution Area		
<i>Bracket-mounted, enclosed luminaries on approved wood pole</i>		
<i>1 light per 10 customers or major fraction thereof</i>		
per customer	150w High Pressure Sodium	\$1.47
<i>1 light per 10 customers or major fraction thereof</i>		
per customer	150w High Pressure Sodium	\$2.94
Underground Distribution Area		
<i>Bracket-mounted, enclosed luminaries on standard metal pole</i>		
<i>1 light per 10 customers on major fraction thereof</i>		
per customer	150w High Pressure Sodium	\$2.09
<i>1 light per 10 customers on major fraction thereof</i>		
per customer	150w High Pressure Sodium	\$4.18
<i>Bracket-mounted, enclosed luminaries on standard metal pole</i>		
<i>1 light per 10 customers or major fraction thereof</i>		
per customer	150w High Pressure Sodium	\$2.38
per customer	9,500 lumen sodium vapor	\$2.38
<i>1 light per 3 customers or major fraction thereof</i>		

per customer	150w High Pressure Sodium	\$3.99
	<i>1 light per 3 customers or major fraction thereof</i>	
per customer	150w High Pressure Sodium	\$7.98
	<i>Approve J Post Mounted type luminaries</i>	
	<i>1 light per 10 customers or major fraction thereof</i>	
per customer	150w High Pressure Sodium	\$2.38
	<i>1 light per 6 customers or major fraction thereof</i>	
per customer	150w High Pressure Sodium	\$3.99
	<i>1 light per 3 customers or major fraction thereof</i>	
per customer	150w High Pressure Sodium	\$7.98

Street Lighting Service – 32-B (Residential Subdivision)	Rate			
	Effective Date	7/1/2024	7/1/2025	7/1/2026
Overhead Distribution Area				
<i>Bracket mounted, enclosed luminaire on approved wood pole 1 light</i>				
<i>Per 10 customers or major fraction thereof</i>				
7,000 lumen Mercury Vapor (per customer)		\$1.54	\$1.62	\$1.70
9,500 lumen Mercury Vapor (per customer)		\$1.54	\$1.62	\$1.70
<i>1 light per 5 customers or major fraction thereof</i>				
7,000 lumen Mercury Vapor (per customer)		\$3.09	\$3.24	\$3.40
9,500 lumen Sodium Vapor (per customer)		\$3.09	\$3.24	\$3.40
Underground Distribution Area				
<i>Bracket mounted, enclosed luminaire on approved wood pole 1 light</i>				
<i>Per 10 customers or major fraction thereof</i>				
7,000 lumen Mercury Vapor (per customer)		\$2.19	\$2.30	\$2.42
9,500 lumen Mercury Vapor (per customer)		\$2.19	\$2.30	\$2.42
<i>1 light per 5 customers or major fraction thereof</i>				
7,000 lumen Mercury Vapor (per customer)		\$4.40	\$4.60	\$4.85
9,500 lumen Mercury Vapor (per customer)		\$4.40	\$4.60	\$4.85
<i>Bracket mounted, enclosed luminaries on standard metal pole</i>				
<i>1 light per 10 customers or major fraction thereof</i>				
7,000 lumen Mercury Vapor (per customer)		\$2.50	\$2.60	\$2.75
9,500 lumen Sodium Vapor (per customer)		\$2.50	\$2.60	\$2.75
<i>1 light per 6 customers or major fraction thereof</i>				
7,000 lumen Mercury Vapor (per customer)		\$4.20	\$4.40	\$4.65
<i>Approved post mounted type luminaries</i>				
<i>1 light per 10 customers or major fraction thereof</i>				
7,000 lumen Mercury Vapor (per customer)		\$2.50	\$2.60	\$2.75
9,500 lumen Sodium Vapor (per customer)		\$2.50	\$2.60	\$2.75
<i>1 light per 6 customers or major fraction thereof</i>				
7,000 lumen Mercury Vapor (per customer)		\$4.20	\$4.40	\$4.65
9,500 lumen Sodium Vapor (per customer)		\$4.20	\$4.40	\$4.65

Street Lighting Service Schedule 32-C
High Pressure Sodium

Monthly Rate	150w	\$8.44
Monthly Rate	250w	\$10.77
Monthly Rate	400w	\$13.18
Monthly Rate	400w flood	\$14.47

<u>Street Lighting Service – Schedule 32-C</u>	<u>Rate</u>			
	<u>Effective Date</u>	<u>7/1/2024</u>	<u>7/1/2025</u>	<u>7/1/2026</u>
<u>Sodium Vapor</u>				
150w (per month)		\$8.85	\$9.30	\$9.75
400w (per month)		\$13.85	\$14.55	\$15.30
400w Flood (per month)		\$15.20	\$15.95	\$16.75
<u>Hight Pressure Sodium</u>				
250w (per month)		\$11.30	\$11.85	\$12.45

SECTION 2. ~~That the following Residential Service #1 Schedule 01 and Schedule 07 are hereby adopted effective May 14, 2024.~~

CITY OF NEW BERN
Residential Service #1
Schedule 01, Schedule 07

AVAILABILITY

Service under this schedule is available for separately metered and billed supply of alternating electric current to single family residences, including a residential farm where the farm uses are not taken through a separate meter.

This schedule is not available for (a) individual motors rated on 15HP; (b) commercial use as in hotels, public inns, motels, auto courts, tourist camps, and trailer camps; (c) separately metered accessory buildings or equipment on residential property not suitable for residential use; or (d) bulk barns and other seasonal high use facilities.

Non-fossil energy sources caused by acts of nature, such as wind or solar, are permitted as supplements to customer's energy requirements provided the City is granted the right to install, operate and monitor special equipment to measure the customer's load, or any part thereof, and to obtain any other data necessary to determine the operating characteristics and effects of the installation.

APPLICABILITY

The schedule is applicable to all electric service of the same available type supplied to the customer's premises at one point of delivery through a one kilowatt-hour meter in accordance with Schedule 01 and Schedule 07 below.

ADDITIONAL POINTS OF DELIVERY

Additional points of delivery installed on structures at same premises for other than residential dwelling purposes shall be billed under the appropriate rate schedule.

TYPE OF SERVICE

The type of service to which this schedule is applicable are alternating current, 60 hertz, either single-phase two or three wires, or three-phase four wires at City's standard voltages of 240 volts or less.

SCHEDULE 01

MONTHLY RATES

For Single-Phase Service

————— Basic Customer Charge ————— \$9.95

————— *Energy Charges* —————

For all first 300 kilowatt hours		\$0.1018		
For all additional kilowatt hours		\$0.1175		
<u>Effective Date</u>	<u>7/1/2024</u>	<u>7/1/2025</u>	<u>7/1/2026</u>	
<u>Customer Charge</u>	<u>\$12.00</u>	<u>\$14.00</u>	<u>\$16.00</u>	

<u>Energy Charges</u>				
For all first 300 kWh		\$0.1060	\$0.1105	\$0.1154
For all additional kWh		\$0.1217	\$0.1262	\$0.1311

For Three-Phase Service

The bill computed for single phase service plus \$13.67.

<u>Effective Date</u>	<u>7/1/2024</u>	<u>7/1/2025</u>	<u>7/1/2026</u>	
The bill computed for single phase service plus	\$14.35	\$15.05	\$15.80	

SCHEDULE 07 (Energy Efficient Residential Rate)

ENERGY CONSERVATION DISCOUNT

Where customer notifies company and customer's dwelling complies with the thermal requirements herein, participates fully in the City of New Bern Load Management program, and operates no fossil fuel burning appliances for the purpose of heating or production of hot water, the Schedule E01 kWh charges will be discounted by 5% kWh.

MONTHLY RATES

For Single-Phase Service

Basic Customer Charge		\$9.95		
<u>Energy Charges</u>				
For the first 300 kilowatt hours		\$0.0968		
For all additional kilowatt hours		\$0.1116 (See E50)		
<u>Effective Date</u>	<u>7/1/2024</u>	<u>7/1/2025</u>	<u>7/1/2026</u>	
<u>Customer Charge</u>	<u>\$12.00</u>	<u>\$14.00</u>	<u>\$16.00</u>	
<u>Energy Charges</u>				
For the first 300 kWh		\$0.1007	\$0.1050	\$0.1096
For all additional kWh		\$0.1156	\$0.1199	\$0.1245

For Three-Phase Service

The bill computed for single phase service plus \$13.67

<u>Effective Date</u>	<u>7/1/2024</u>	<u>7/1/2025</u>	<u>7/1/2026</u>	
The bill computed for single phase service plus	\$14.35	\$15.05	\$15.80	

THERMAL REQUIREMENTS CONVENTIONAL

HOUSING

In no case shall the structure's heat loss, including duct heat loss, be greater than 0.1 watts (.34 Btuh) per square foot of net heated floor area per degree Fahrenheit temperature difference. Generally, the criteria may be satisfied if the following provisions are met:

- A. Ceilings with an installed insulation thermal resistance value of R-30.
- B. Exterior walls with an installed insulation thermal resistance value of R-13.
- C. Floors over crawl spaces with an installed insulation thermal resistance value of R-19.
- D. All windows should be insulated double pane glass or single pane glass with storm windows.
- E. All exterior doors should be wood with storm doors or insulated metal doors.
- F. Adequate natural or mechanical attic ventilation should be provided.
- G. Effective with building permits issued 7/1/02, the dwelling is all electric (range-oven, heating, air conditioning, water heater, dryer).

MANUFACTURED HOUSING

In no case shall the structure's heat loss, including duct loss, be greater than .0125 watts (0.43 Btuh), per square foot of net heated floor area per degree Fahrenheit temperature difference.

Generally, these criteria may be satisfied if the following provisions are met:

- A. Ceilings with an installed insulation thermal resistance value of R-19
- B. Exterior walls with an insulation thermal resistance value of R-13.
- C. Floors over crawl spaces with an installed insulation thermal resistance value of R-19.
- D. All windows should be insulated double pane glass or single pane glass with storm windows.
- E. All exterior doors should be wood with storm doors or insulated metal doors.
- F. Effective with building permits issued 7/1/02, the dwelling is all electric (range-oven, heating, air conditioning, water heater, dryer).

A copy of the manufacturer's certificate stating that the manufactured home in question meets or exceeds the above thermal requirements shall be submitted to the City's Electric Utilities Department in order to obtain the 5% energy efficient discount.

PAYMENTS

Bills are due and payable no later than the due date reflected on the bill, which shall be no earlier than twenty (20) days from the date of the bill. If any bill is not so paid, the City has the right to suspend service in accordance with its service regulations.

SALES TAX

To the above charges will be added any applicable North Carolina sales tax.

CONTRACT PERIOD

The contract period shall not be less than one year.

GENERAL

Service rendered under this schedule is subject to the provisions of the City's service regulations, and any changes therein, substitutions therefore, or additions thereto lawfully made.

SECTION 3: ~~That the following Small General Service #1 Schedule 03 is hereby adopted effective May 14, 2024.~~

CITY OF NEW BERN Small General Service #1 Schedule 03

AVAILABILITY

This schedule is available for electric service at a single point of delivery, at one of the City's standard voltages, used by any non-residential customer with monthly energy readings of less than 2500 kWh for at least ten of the preceding twelve months. When the customer's monthly energy has equaled or exceeds 2500 kWh for at least three of the preceding twelve months, the City may install a demand meter to determine the maximum 15-minute demand and begin billing the customer for demand under Small General Service Schedule 04.

This schedule is not available: (1) for residential service; (2) for resale service; (3) Electric vehicle (EV) chargers; where EV chargers are the largest any time demand (kW) at the point of utility metering, or (4) whenever the monthly energy equals or exceeds 2500 kW for at least three of the preceding twelve months. In order to determine the applicable rate schedule for a customer, the City will review that customer's monthly readings once a year in one-year increments from the month that the customer first started receiving bills under a new schedule.

When the customer has installed generating or converting equipment that can operate in parallel with the City's service, the customer shall install the protective equipment acceptable to the City that will protect the City's employees, its other customers, and its distribution system. The City shall have the right to suspend delivery of

electricity to the customer with such generating or converting equipment until the customer has installed the protective equipment.

APPLICABILITY

This schedule is applicable to all electric service of the same available type supplied to the customer’s premises at one point of delivery through one meter.

MONTHLY RATES

For Single-Phase Service

Customer Charge	\$20.64
<i>Energy Charges</i>	
First 2325 kWh	\$0.1260 per kWh
Next 1000 kWh	\$0.0960 per kWh
Over 3325 kWh	\$0.0900 per kWh

<u>Effective Date</u>	<u>7/1/2024</u>	<u>7/1/2025</u>	<u>7/1/2026</u>
<u>Customer Charge</u>	<u>\$25.00</u>	<u>\$29.50</u>	<u>\$34.00</u>

<u>Energy Charges</u>			
<u>First 2325 kWh</u>	<u>\$0.1264</u>	<u>\$0.1268</u>	<u>\$0.1275</u>
<u>Next 1000 kWh</u>	<u>\$0.1010</u>	<u>\$0.1060</u>	<u>\$0.1120</u>
<u>Over 3325 kWh</u>	<u>\$0.0900</u>	<u>\$0.0920</u>	<u>\$0.0980</u>

For Three-Phase Service

~~Bill for single phase service plus \$13.67~~

<u>Effective Date</u>	<u>7/1/2024</u>	<u>7/1/2025</u>	<u>7/1/2026</u>
<u>The bill computed for single phase service plus</u>	<u>\$14.35</u>	<u>\$15.05</u>	<u>\$15.80</u>

DETERMINATION OF DEMAND

Any time demand shall be the highest 15-minute demand recorded during the current billing cycle.

SALES TAX

To the above charges will be added any applicable North Carolina sales tax.

PAYMENTS

Bills are due and payable no later than the due date reflected on the bill, which shall be no earlier than twenty (20) days from the date of the bill. If any bill is not so paid, the City has the right to suspend service in accordance with its service regulations.

CONTRACT PERIOD

The contract period shall not be less than one year, except for short term, construction, or temporary service, in which case the contract period may be for the period requested by the customer, provided the customer agrees:

1. That the service supplied shall be for a continuous period until discontinued, and
2. That where it is necessary for the City to extend lines, erect transformers, or do any work necessary to supply service, except for the installation of a self-contained meter, the customer

shall pay for the lines extension in accordance with the City's customer service policies as may be amended from time to time.

GENERAL

Service rendered under this schedule is subject to the provisions of the City's service regulations, and any changes therein, substitutions therefore, or additions thereto lawfully made.

SECTION 4. ~~That the following Small General Service #2 Schedule 04 is hereby adopted effective May 14, 2024:~~

CITY OF NEW BERN
Small General Service #2 Schedule 04

AVAILABILITY

This schedule is available for electric service at a single point of delivery, at one of the City’s standard voltages, used by any non-residential customer with monthly energy readings of 2500 kWh or greater for at least three of the preceding twelve months but with demand reading of less than 35kWh for at least eleven of the preceding twelve months.

This schedule is not available; (1) for residential service; (2) for resale service; (3) Electric vehicle (EV) chargers; where EV chargers are the largest any time demand (kW) at the point of utility metering, or (4) whenever the monthly demand equals or exceeds 35kW for at least two of the preceding twelve months. In order to determine the applicable rate schedule for a customer, the City will review the customer’s monthly readings once a year, in one-year increments from the month that the customer first started receiving bills under a new schedule.

When the customer has installed generating or converting equipment that can operate in parallel with the City’s service, the customer shall install the protective equipment acceptable to the City that will protect the City’s employees, its other customers, and its distribution system. The City shall have the right to suspend delivery of electricity to the customer with such generating or converting equipment until the customer has installed the protective equipment.

APPLICABILITY

This schedule is applicable to all electric service of the same available type supplied to the customer’s premises at one point of delivery through one meter.

MONTHLY RATES

For Single-Phase Service

Customer Charge	\$20.64
<i>Energy Charges</i>	
First 2325 kWh	\$0.1013 per kWh
Next 1000 kWh	\$0.0956 per kWh
All over 3325 kWh	\$0.0887 per kWh

Demand Charge	\$2.31		
<u>Effective Date</u>	<u>7/1/2024</u>	<u>7/1/2025</u>	<u>7/1/2026</u>
<u>Customer Charge</u>	<u>\$25.00</u>	<u>\$29.50</u>	<u>\$34.00</u>
<i>Energy Charges</i>			
<u>First 2325 kWh</u>	<u>\$0.1030</u>	<u>\$0.1048</u>	<u>\$0.1069</u>
<u>Next 1000 kWh</u>	<u>\$0.0973</u>	<u>\$0.0991</u>	<u>\$0.1012</u>
<u>All over 3325 kWh</u>	<u>\$0.0904</u>	<u>\$0.0922</u>	<u>\$0.0943</u>
<u>Demand Charge per kW</u>	<u>\$3.00</u>	<u>\$3.75</u>	<u>\$4.50</u>

For Three-Phase Service

Bill for single phase service plus \$13.67

<u>Effective Date</u>	<u>7/1/2024</u>	<u>7/1/2025</u>	<u>7/1/2026</u>
<u>The bill computed for single phase service plus</u>	<u>\$14.35</u>	<u>\$15.05</u>	<u>\$15.80</u>

DETERMINATION OF DEMAND

The billing demand shall be the maximum kW registered or computed by or from the City's metering facilities during any 15-minute interval within the current billing cycle.

Any time demand shall be the highest 15-minute demand recorded during the current billing cycle.

SALES TAX

To the above charges will be added any applicable North Carolina sales tax.

PAYMENTS

Bills are due and payable no later than the due date reflected on the bill, which shall be no earlier than twenty (20) days from the date of the bill. If any bill is not so paid, the City has the right to suspend service in accordance with its service regulations.

CONTRACT PERIOD

The contract period shall not be less than one year, except for short-term, construction, or temporary service, in which case the contract period may be for the period requested by the customer, provided the customer agrees:

1. That the service supplied shall be for a continuous period until discontinued; and
2. That where it is necessary for the City to extend lines, erect transformers, or do any work necessary to supply service, except for the installation of a self-contained meter, the customer shall pay for the line extension in accordance with the City's customer service policies as may be amended from time to time.

GENERAL

Service rendered under this schedule is subject to the provisions of the City's service regulations, and any changes therein, substitutions therefore, or additions thereto lawfully made.

SECTION 5. ~~That the following Economic Development CP Rate Schedule EDR4 is hereby adopted effective May 14, 2024:~~

CITY OF NEW BERN
Economic Development CP Rate
Large General Service
Minimum Demand = 350 kW
Schedule EDR5

APPLICABILITY

The Economic Development (ED) Rate set forth in this schedule is available to new loads or load expansions of commercial or industrial customers which meet the following requirements:

1. Have at least a 350 kW annual peak demand;
2. In the case of new loads, have not been served by the City prior to the date on which service of such load under this ED rate commences, except as necessary to maintain a minimum level of service prior to full operation;
3. In the case of load expansions, are at least an incremental addition of 200 kW to the facility's highest Non-Coincidental Peak Demand for the previous twelve (12) months of service and are the result of adding new full-time employees to the organization of at least 100 persons;
4. Are individually metered;
5. Are served under the provision of a service agreement with the City; and
6. Are approved by the Board of Aldermen and the City Manager.

This schedule is not available for: (1) residential service; (2) breakdown, standby, or supplementary service unless used in conjunction with applicable standby or generation service rider for a continuous period of not less than one year; (3) resale service; (4) Electric vehicle (EV) chargers; where EV chargers are the largest any time demand (kW) at the point of utility metering.

CONTRACT PERIOD

Service under this rate is only available to new loads or load expansions for a period of five (5) years, following the date of full operation.

At the end of the customer's eligibility for this rate, the customer will then be switched to the appropriate standard rate schedule based on load size and characteristics.

MONTHLY RATES

Customer Charge	\$197.00 per billing cycle
kW Demand Charge	
All Coincident Peak (CP) Demand	\$26.84 per CP kW

Energy Charge	
All kWh	\$0.0444 per kWh
Excess Demand	\$3.94 per kW

<u>Effective Dates</u>	<u>7/1/2024</u>	<u>7/1/2025</u>	<u>7/1/2026</u>
<u>Customer Charge</u>	<u>\$205.00</u>	<u>\$215.00</u>	<u>\$225.00</u>
<u>Energy Charge per kWh</u>	<u>\$0.0445</u>	<u>\$0.0480</u>	<u>\$0.0520</u>

<u>Demand Charges</u>			
<u>Coincidental Peak Demand per kW</u>	<u>\$27.00</u>	<u>\$27.75</u>	<u>\$28.50</u>
<u>Excess Demand per kW</u>	<u>\$6.00</u>	<u>\$6.75</u>	<u>\$7.50</u>

The minimum charge shall be such as may be contracted for, but not less than the sum of the charges in A, B, C and D above.

DETERMINATION OF DEMAND

Coincident Peak (CP) Demand: The Coincident Peak (CP) Demand shall be the customer's contribution to the City's 60-minute interval which is used by the North Carolina Eastern Municipal Power Agency (NCEMPA) for wholesale billing purposes during the current calendar month.

Excess Demand: Excess Demand shall be the difference between the maximum 15-minute demand recorded during the current billing cycle and the Coincident Peak (CP) Demand for the same billing cycle.

Any Time Demand: Any Time Demand shall be the highest 15-minute demand recorded during the current billing cycle.

kWh: The letters kWh of energy consumption shall be the total usage of electricity during the current billing cycle.

NOTIFICATION BY THE CITY

The City will use diligent effort to predict each monthly system peak and notify the customer in advance; however, the City is not able to guarantee an accurate prediction, and notice will be provided. Notification by

the City will be provided to the customer by the direct telephone communications or automatic signal, as mutually agreed. The customer will hold the City harmless in connection with its response to notification.

SALES TAX

To the above charges will be added any applicable North Carolina sales tax.

PAYMENTS

Bills are due and payable no later than the due date reflected on the bill, which shall be no earlier than twenty (20) days from the date of the bill. If any bill is not so paid, the City has the right to suspend service in accordance with its service regulations.

GENERAL

Service rendered under this schedule is subject to the provisions of the City’s service regulations, and any changes therein, substitutions therefore, or additions thereto lawfully made.

SECTION 6. ~~That the following Large General Service #1 – CP Schedule 13 is hereby adopted effective May 14, 2024:~~

CITY OF NEW BERN
Large General Service #1 – CP
Schedule 13

AVAILABILITY

This schedule is available for electric service at a single point of delivery at one of the City’s standard voltages, used by any non-residential customer with a monthly demand between 750 kWh and 2,000 kW for at least two of the preceding twelve months.

This schedule is not available for (1) residential service; (2) breakdown, standby, or supplementary service unless used in conjunction with applicable standby or generation service rider for a continuous period of not less than one year; (3) resale service; (4) Electric vehicle (EV) chargers; where EV chargers are the largest any time demand (kW) at the point of utility metering or (5) whenever the monthly demand exceeds 100,000 kW. In order to determine the applicable rate schedule for a customer, the City will review that customer’s monthly readings once a year, in one-year increments from the month that the customer first starter receiving bills under a new schedule.

MONTHLY RATES

Customer Charge	\$166.06 per month
Energy Charge	\$0.0561 per kWh
All kWh	
Demand Charges	
Coincident Peak Demand	\$26.84 per kW
Excess Demand	\$4.43 per kW
<i>Effective Date</i>	<u>7/1/2024</u> <u>7/1/2025</u> <u>7/1/2026</u>

<u>Customer Charge</u>	<u>\$175.00</u>	<u>\$184.00</u>	<u>\$193.00</u>
<u>Energy Charge per kWh</u>	<u>\$0.0568</u>	<u>\$0.0590</u>	<u>\$0.0614</u>
<u>Demand Charges</u>			
<u>Coincidental Peak Demand per kW</u>	<u>\$27.00</u>	<u>\$27.75</u>	<u>\$28.50</u>
<u>Excess Demand per kW</u>	<u>\$6.00</u>	<u>\$6.75</u>	<u>\$7.50</u>

DETERMINATION OF DEMAND

Coincident Peak Demand shall be the average kW demand measured in the 60-minute interval used by the North Carolina Eastern Municipal Power Agency for wholesale billing purposes during the corresponding month of the customer's billing.

Excess Demand shall be the highest 15-minute demand recorded during the current billing cycle, less the Monthly Coincident Peak Demand for the current billing cycle.

Any time demand shall be the highest 15-minute demand recorded during the current billing cycle.

NOTIFICATION BY THE CITY

The City will use diligent effort to predict each monthly system peak and notify the customer in advance; however, the City is not able to guarantee an accurate prediction, and notice will be provided. Notification by the City will be provided to the customer by direct telephone communication or automatic signal, as mutually agreed. The customer will hold the City harmless in connection with its response to notification.

POWER FACTOR CORRECTION

Where the power factor of the consumer's installation is less than 85%, the City may correct kWh consumption for the month by multiplying by 85 and dividing by the actual power factor.

SALES TAX

To the above charges will be added any applicable North Carolina sales tax.

PAYMENT

Bills are due and payable no later than the due date reflected on the bill, which shall be no earlier than twenty (20) days from the date of the bill. If any bill is not so paid, the City has the right to suspend service in accordance with its service regulations.

CONTRACT PERIOD

The contract period shall not be less than one year, except for short-term, construction, or temporary service, in which case the contract period may be for the period requested by the customer, provided the customer agrees:

1. That the service supplied shall be for a continuous period until discontinued, and
2. That where it is necessary for City to extend lines, erect transformers, or do any work necessary to supply service, except for the installation of a self-contained meter, the Customer shall pay for the line extension in accordance with the City's customer service policies as may be amended from time to time.

GENERAL

Service rendered under this schedule is subject to the provisions of the City's service regulations, and any changes therein, substitutions therefore, or additions thereto lawfully made.

SECTION 7. ~~That the following Commercial Electric Vehicle Charging Station—CP Schedule 14 is hereby adopted effective May 14, 2024:~~

CITY OF NEW BERN
Commercial Electric Vehicle
Charging Station Service – CP
Schedule 14

AVAILABILITY

This schedule is available for electric service at a single point of utility metering at one of the City's standard voltages, for the purpose of providing power at commercially owned electric vehicle (EV) charging stations.

This schedule is not available whenever the monthly anytime demand exceeds 1,000 kW.

MONTHLY RATES

Customer Charge	\$166.06 per month
Energy Charge	
Load Factor less than or equal to 10%	\$0.10100 kWh
Load Factor greater than 10% and less than or equal to 20%	\$0.07855 per kWh
Load Factor greater than 20%	\$0.0561 per kWh
Demand Charges	

Coincident Peak Demand	\$26.84 per kW		
Excess Demand	\$4.43 per kW		
<i>Effective Date</i>	<u>7/1/2024</u>	<u>7/1/2025</u>	<u>7/1/2026</u>
Customer Charge	<u>\$175.00</u>	<u>\$184.00</u>	<u>\$193.00</u>
<i>Energy Charge</i>			
Load Factor less than or equal to 10% per kWh	<u>\$0.1018</u>	<u>\$0.1040</u>	<u>\$0.1064</u>
Load Factor Greater than 10% and less than or equal to 20% per kWh	<u>\$0.0793</u>	<u>\$0.0815</u>	<u>\$0.0839</u>
Load Factor greater than 20% per kWh	<u>\$0.0568</u>	<u>\$0.0590</u>	<u>\$0.0614</u>
<i>Demand Charges</i>			
Coincidental Peak Demand per kW	<u>\$27.00</u>	<u>\$27.75</u>	<u>\$28.50</u>
Excess Demand per kW	<u>\$6.00</u>	<u>\$6.75</u>	<u>\$7.50</u>

DETERMINATION OF BILLING DEMAND

Coincident Peak Demand shall be the average kW demand measured in the 60-minute interval used by the North Carolina Eastern Municipal Power Agency for wholesale billing purposes during the corresponding month of the customer's billing.

Excess Demand shall be the highest 15-minute any time demand recorded during the current billing month, less the Monthly Coincident Peak Demand for the current billing cycle.

Any Time Demand shall be the highest 15-minute demand recorded during the current billing cycle.

DETERMINATION OF ENERGY

Energy charge shall be determined by the calculated monthly load factor (LF). The energy charge shall adjust up or down when the calculated monthly load factor exceeds the threshold for a period of six (6) consecutive billing cycles. Load factor shall be determined by the total energy hours used during the billing cycle divided by the product of the anytime demand and the number hours in the billing cycle.

$$LF = \text{kWh} / (\text{Any Time Demand} \times \text{Hours in Billing Cycle})$$

NOTIFICATION BY THE CITY

The City will use diligent effort to predict each monthly system peak and notify the customer in advance; however, the City is not able to guarantee an accurate prediction, and notice will be provided. Notification by the City will be provided to the customer by direct telephone communication or automatic signal, as mutually agreed. The customer will hold the City harmless in connection with its response to notification.

POWER FACTOR CORRECTION

Where the power factor of the consumer's installation is less than 85%, the City may correct kWh consumption for the month by multiplying by 85 and dividing by the actual power factor.

SALES TAX

To the above charges will be added any applicable North Carolina sales tax.

PAYMENT

Bills are due and payable no later than the due date reflected on the bill, which shall be no earlier than twenty (20) days from the date of the bill. If any bill is not so paid, the City has the right to suspend service in accordance with its service regulations.

CONTRACT PERIOD

The contract period shall not be less than one year, except for short-term, construction, or temporary service, in which case the contract period may be for the period requested by the customer, provided the customer agrees:

1. That the service supplied shall be for a continuous period until discontinued, and
2. That where it is necessary for City to extend lines, erect transformers, or do any work necessary to supply service, except for the installation of a self-contained meter, the customer shall pay for the line extension in accordance with the City's customer service policies as may be amended from time to time.

GENERAL

Service rendered under this schedule is subject to the provisions of the City's service regulations, and any changes therein, substitutions therefore, or additions thereto lawfully made.

~~SECTION 8. That the following Utility Owned Electric Vehicle Charging Stations Schedule 15 is hereby adopted effective May 14, 2024:~~

CITY OF NEW BERN
Utility Owned Electric Vehicle Charging Stations
Schedule 15

PURPOSE

The City recognizes the potential growth of electric vehicles (EV) across the City's electric service territory. The purpose of this pilot program is for the City to evaluate the impact of EV charging on the public electric system and/or any interest towards owning a network of publicly accessible EV charging stations.

AVAILABILITY

This service is available for EV charging stations owned by the City of New Bern. Charging stations are available for use by the public, exclusive to vehicles attempting to charge and not exclusive to City of New Bern electric customers.

Whereas charging station is defined as single point charging and charging site may have one or more charging stations. The City may throttle the available charging capacity of both the charging site and/or charging station to balance the impact of EV charging on the public electric distribution system. The City does not guarantee availability at charging sites or charging stations.

This service is not available where the total charging site requirement exceeds 125 kW.

Obstructing access to charging sites and/or stations is subject to towing and/or fines.

USAGE RATES

<u>Active Energy Charging</u>			
Load Factor less than or equal to 10%			\$0.68 per kWh
Load Factor greater than 10% and less than or equal to 20%			\$0.47 per kWh
Load Factor greater than 20%			\$0.38 per kWh
<u>In Active Charging</u>			
In active charging is applied after 10 minutes			\$0.17 per minute
Of idle charging and occupying space at the charger.			
<u>Effective Date</u>	<u>7/1/2024</u>	<u>7/1/2025</u>	<u>7/1/2026</u>
<u>Active Energy Charging</u>			
Load Factor less than or equal to 10% per kWh	\$0.7100	\$0.7500	\$0.7900
Load Factor greater than 10% and less than or equal to 20% per kWh	\$0.4900	\$0.5100	\$0.5400
Load Factor greater than 20% per kWh	\$0.4000	\$0.4200	\$0.4400
<u>In Active Charging</u>			
In active charging is applied after 10 minutes of idle charging and occupying space at the charger per minute	\$0.1800	\$0.1900	\$0.2000

DETERMINATION OF ACTIVE ENERGY CHARGING

Active Energy Charge shall be determined by calculating monthly load factor (LF) for the charging site. The energy charge shall adjust up or down when the calculated monthly load factor exceeds the threshold for a period of six (6) consecutive calendar months. Monthly load factor shall be determined by the total charging site energy hours used during the month divided by the product of the charging site blended demand capacity and the number of hours in the billing cycle.

LF=kWh / (120.04 kW X Hours in Billing Cycle)

SALES TAX

~~To the above charges, taxes will be added at the point sale. Taxes will include any applicable North Carolina sales tax and/or other applicable taxes.~~
To the above charges will be added any applicable North Carolina sales tax.

PAYMENT

Payment shall be made via the customers ChargePoint account. Cash and/or credit card transactions are not available.

CONTRACT PERIOD

The pilot program shall continue through February 12, 2023 per the contractual requirements set forth by the NCDEQ VW-DC Fast Program or extended as needed. Record keeping and reporting shall continue for a period of five (5) years following the expiration of the contract. At the end of the pilot program, the City may consider any further interest to own EV charging stations or divest their interest.

GENERAL

Service rendered under this schedule is subject to the provisions of the City's service regulations, and any changes therein, substitutions therefore, or additions thereto lawfully made.

SECTION 9. That the following Medium General Service #1 Schedule 08 is hereby adopted effective May 14, 2024:

CITY OF NEW BERN
Medium General Service #1
Schedule 08

AVAILABILITY

This schedule is available for electric service used at a single point of delivery, at one of the City’s standard voltages, used by any non-residential customer with a monthly demand of 35 kW or greater for at least two of the preceding twelve months, but less than 100 kW for 11 of the preceding twelve months.

This schedule is not available for: (1) residential service; (2) breakdown, standby, or supplementary service unless used in conjunction with applicable standby or generation service rider for a continuous period of not less than one year; (3) resale service; (4) Electric vehicle (EV) chargers; where EV chargers are the largest connected Any Time Demand (kW) at the point of utility metering. (5) or whenever the registered or computed demand equals or exceeds 100 kW. In order to determine that applicable rate schedule for a customer, the City will review that customer’s monthly readings once a year in one-year increments from the month that customer first started receiving bills under a new schedule.

MONTHLY RATES

For Single-Phase Service

<u>Customer Charge</u>	<u>\$22.80</u>
<u>Energy Charge</u>	<u>\$0.0842 per kWh</u>
<u>Demand Charge</u>	<u>\$8.08 per kW</u>

<u>Effective Date</u>	<u>7/1/2024</u>	<u>7/1/2025</u>	<u>7/1/2026</u>
<u>Customer Charge</u>	<u>\$27.00</u>	<u>\$31.50</u>	<u>\$36.00</u>
<u>Energy Charge per kWh</u>	<u>\$0.0863</u>	<u>\$0.0893</u>	<u>\$0.0926</u>
<u>Demand Charge per kW</u>	<u>\$9.00</u>	<u>\$9.75</u>	<u>\$10.50</u>

For Three-Phase Service

~~Bill computed for single phase service plus \$13.67.~~

<u>Effective Date</u>	<u>7/1/2024</u>	<u>7/1/2025</u>	<u>7/1/2026</u>
<u>Bill computed for single-phase service plus</u>	<u>\$14.35</u>	<u>\$15.05</u>	<u>\$15.80</u>

DETERMINATION OF DEMAND

The billing demand shall be the maximum kW registered or computed by or from the City’s metering facilities during any 15-minute interval within the current billing cycle.

Any Time Demand shall be the highest 15-minute demand recorded during the current billing cycle.

SALES TAX

To the above charges will be added any applicable North Carolina sales tax.

PAYMENT

Bills are due and payable no later than the due date reflected on the bill, which shall be no earlier than twenty (20) days from the date of the bill. If any bill is not so paid, the City has the right to suspend service in accordance with its service regulations.

CONTRACT PERIOD

The contract period shall not be less than one year, except for short-term, construction, or temporary service, in which case the contract period may be for the period requested by the customer, provided the customer agrees:

1. That the service supplied shall be for a continuous period until disconnected, and
2. That where it is necessary for City to extend lines, erect transformers, or do any work necessary to supply service, except for the installation of a self-contained meter, the customer shall pay for the line extension in accordance with the City's customer service policies as may be amended from time to time.

GENERAL

Service rendered under this Schedule is subject to the provisions of the City's Service Regulations, and any changes therein, substitutions therefore, or additions thereto lawfully made.

SECTION 10. That the following Small Wholesale Customer Rate Schedule 09 is hereby adopted effective May 14, 2024:

CITY OF NEW BERN
Small Wholesale Customer Rate
Schedule 09

AVAILABILITY

This schedule is available for electric used by a nonresidential customer at a single point of delivery at one of the City’s standard voltages with a contract demand or a registered or computed demand of kW and greater but less than 750 kW.

This schedule is not available for (1) residential service; (2) breakdown, standby, or supplementary service unless used in conjunction with the applicable standby or generation service rider for a continuous period of not less than one year; (3) Electric vehicle (EV) chargers; where EV chargers are the largest Any Time Demand (kW) at the point of utility metering. (4) a new customer with a contract demand of 750 kW or more, or whenever the registered or computed demand equals or exceeds 1,000 kW in two or more of the preceding twelve months.

MONTHLY RATES

For Single-Phase Service

Customer Charge	\$21.78		
Billing Demand	\$6.69 per kW		
Kilowatt Hour Energy	\$0.0859 per kWh		
<u>Effective Date</u>	<u>7/1/2024</u>	<u>7/1/2025</u>	<u>7/1/2026</u>
<u>Customer Charge</u>	<u>\$27.00</u>	<u>\$33.00</u>	<u>\$39.00</u>
<u>Energy Charge per kWh</u>	<u>\$0.0870</u>	<u>\$0.0856</u>	<u>\$0.0846</u>
<u>Demand Charge per kW</u>	<u>\$7.00</u>	<u>\$7.75</u>	<u>\$8.50</u>

For Three-Phase Service

~~The bill computed for single phase service plus \$13.67~~

<u>Effective Date</u>	<u>7/1/2024</u>	<u>7/1/2025</u>	<u>7/1/2026</u>
<u>The bill computed for single phase service plus</u>	<u>\$14.35</u>	<u>\$15.05</u>	<u>\$15.80</u>

CONTRACT DEMAND

The contract demand shall be the kW of demand specified in the service agreement.

DETERMINATION OF DEMAND

The billing demand shall be the greater of the maximum kW registered or computed by or from the City's metering facilities during any 15-minute interval within the current billing cycle or 30

Any Time Demand shall be the highest 15-minute demand recorded during the current billing cycle.

SALES TAX

To the above charges will be added any applicable North Carolina sales tax.

PAYMENTS

Bill are due and payable no later than the due date reflected on the bill, which shall be no earlier than twenty (20) days from the date of the bill. If any bill is not so paid, the City has the right to suspend service in accordance with its service regulations.

CONTRACT PERIOD

The contract period shall not be less than one year, except for short-term, construction, or temporary service, in which case the contract period may be for the period requested by the customer, provided the customer agrees:

1. That the service supplied shall be for a continuous period until discontinued, and
2. That where it is necessary for City to extend lines, erect transformers, or do any work necessary to supply service, except for the installation of a self-contained meter, the Customer shall pay for the line extension in accordance with the City's customer service policies as may be amended from time to time.

GENERAL

Service rendered under this schedule is subject to the provisions of the City's service regulations, and any changes therein, substitutions therefore, or additions thereto lawfully made.

SECTION 11. ~~That the following Large General Service #2-CP Schedule 06 is hereby adopted effective May 14, 2024.~~

CITY OF NEW BERN
Large General Service #2 – CP
Schedule 06

AVAILABILITY

This schedule is available for electric service at a single point of delivery at one of the City’s standard voltages, used by any non-residential customer with a monthly demand of 2000kW or greater for at least two of the preceding 12 months.

This schedule is not available for (1) residential service; (2) breakdown, standby, or supplementary service unless used in conjunction with applicable standby or generation service rider for a continuous period of not less than one year; (3) resale service; (4) Electric vehicle (EV) chargers; where EV chargers are the largest Any Time Demand (kW) at the point of utility metering or (5) whenever the monthly demand exceeds 100,000 kW. In order to determine the applicable rate schedule for a customer, the City will review that customer’s monthly readings once a year, in one-year increments from the month that the customer first started receiving bills under a new schedule.

MONTHLY RATES

Customer Charge	\$1,214.06 per month		
Energy Charge			
First 700,000 kW	\$0.0529 per kW		
Addition kWh	\$0.0445 per kWh		
Demand Charges			
Coincidental Peak Demand			
First 3200 kW	\$26.84 per kW		
Additional kW	\$14.94 per kW		
Excess Demand	\$4.19 per kW		
<u>Effective Date</u>	<u>7/1/2024</u>	<u>7/1/2025</u>	<u>7/1/2026</u>
<u>Customer Charge</u>	<u>\$1,250.00</u>	<u>\$1,285.00</u>	<u>\$1,320.00</u>

<u>Energy Charge</u>			
First 1,700,000 kWh	<u>\$0.0529</u>	<u>\$0.0543</u>	<u>\$0.0564</u>
Additional kWh	<u>\$0.0445</u>	<u>\$0.0543</u>	<u>\$0.0564</u>
<u>Demand Charges</u>			
Coincidental Peak Demand per kW	<u>\$27.00</u>	<u>\$27.75</u>	<u>\$28.50</u>
Excess Demand per kW	<u>\$6.00</u>	<u>\$6.75</u>	<u>\$7.50</u>

DETERMINATION OF DEMAND

Coincident Peak Demand shall be the average kW demand measured in the 60-minute interval used by the North Carolina Eastern Municipal Power Agency for wholesale billing purposes during the corresponding month of the customer’s billing.

Excess Demand shall be the highest 15-minute demand recorded during the current billing cycle, less the Monthly Coincident Peak Demand for the current billing cycle.

Any Time Demand shall be the highest 15-minute demand recorded during the current billing cycle.

NOTIFICATION BY THE CITY

The City will use diligent effort to predict each monthly system peak and notify the customer in advance; however, the City is not able to guarantee an accurate prediction, and notice will be provided. Notification by the City will be provided to the customer by direct telephone communications or automatic signal, as mutually agreed. The customer will hold the City harmless in connection with its response notification.

POWER FACTOR CORRECTION

Where the power factor of the consumer’s installation is less than 85%, the City may correct kWh consumption for the month by multiplying by 85 and dividing by the actual power factor.

SALES TAX

To the above charges will be added any applicable North Carolina sales tax.

PAYMENT

Bills are due and payable no later than the due date reflected on the bill, which shall be no earlier than twenty (20) days from the date of the bill. If any bill is not so paid, the City has the right to suspend service in accordance with its service regulations.

CONTRACT PERIOD

The contract period shall not be less than one year, except for short-term, construction, or temporary service, in which case the contract period may be for the period requested by the customer, provided the customer agrees:

1. That the service supplied shall be for a continuous period until discontinued, and
2. That where it is necessary for City to extend lines, erect transformers, or do any work necessary to supply service, except for the installation of a self-contained meter, the Customer shall pay for the line extension in accordance with the City’s customer service policies as may be amended from time to time.

GENERAL

Service rendered under this schedule is subject to the provisions of the City’s service regulations, and any changes therein, substitutions therefore, or additions thereto lawfully made.

SECTION 12. That the following Medium General Service #2 Schedule 10 is hereby adopted effective May 14, 2024:

CITY OF NEW BERN
Medium General Service #2
Schedule 10

AVAILABILITY

This Schedule is available for electric service used at a single point of delivery, at one of the City's standard voltages, used by any non-residential customer with a monthly demand of 100 kW or greater for at least two of the preceding twelve months, but less than 750 kW for at least eleven of the preceding twelve months.

This schedule is not available for: (1) residential service; (2) breakdown, standby, or supplementary service unless used in conjunction with applicable standby or generation service rider for a continuous period of not less than one year; (3) resale service; (4) Electric vehicle (EV) chargers; where EV chargers are the largest Any Time Demand (kW) at the point of utility metering, (5) or whenever the monthly demand has equaled or exceeded 750 kW for at least two of the preceding twelve months. In order to determine the applicable rate schedule for a customer, the City will review that customer's monthly readings once a year in one-year increments from the month that Customer first started receiving bills under a new schedule.

MONTHLY RATES

For Single-Phase Service

Customer Charge	\$22.80		
Energy Charge	\$0.0800 per kWh		
Demand Charge	\$8.95 per kW		
<u>Effective Date</u>	<u>7/1/2024</u>	<u>7/1/2025</u>	<u>7/1/2026</u>
<u>Customer Charge</u>	<u>\$27.00</u>	<u>\$31.50</u>	<u>\$36.00</u>
<u>Energy Charge per kWh</u>	<u>\$0.0829</u>	<u>\$0.0862</u>	<u>\$0.0898</u>
<u>Demand Charge per kW</u>	<u>\$9.75</u>	<u>\$10.50</u>	<u>\$11.25</u>

For Three-Phase Service

Bill computed for single phase service plus \$13.67

<u>Effective Date</u>	<u>7/1/2024</u>	<u>7/1/2025</u>	<u>7/1/2026</u>
<u>Bill computed for single phase service plus</u>	<u>\$14.35</u>	<u>\$15.05</u>	<u>\$15.80</u>

DETERMINATION OF DEMAND

The billing demand shall be the maximum kW registered or computed by or from the City's metering facilities during any 15-minute interval within the current billing cycle.

Any Time Demand shall be the highest 15-minute demand recorded during the current billing cycle.

SALES TAX

To the above charges will be added any applicable North Carolina sales tax.

PAYMENT

Bills are due and payable no later than the due date reflected on the bill, which shall be no earlier than twenty (20) days from the date of the bill. If any bill is not so paid, the City has the right to suspend service in accordance with its service regulations.

CONTRACT PERIOD

The contract period shall not be less than one year, except for short-term, construction, or temporary service, in which case the contract period may be for the period requested by the customer, provided the customer agrees:

1. That the service supplied shall be for a continuous period until discontinued, and
2. That where it is necessary for the City to extend lines, erect transformers, or do any work necessary to supply service, except for the installation of a self-contained meter, the Customer shall pay for the line extension in accordance with the City's customer service policies as may be amended from time to time.

GENERAL

Service rendered under this schedule is subject to the provisions of the City's Service Regulations, and any changes therein, substitutions therefore, or additions thereto lawfully made.

SECTION 13. ~~That the following Medium General Service (Time of Use) Schedule 11 is hereby adopted effective May 14, 2024:~~

CITY OF NEW BERN
Medium General Service (Time of Use)
Schedule 11

AVAILABILITY

This schedule is available on a voluntary basis for electric service at a single point of delivery at one of the City's standard voltages used by any non-residential customer with a monthly demand of 30 kW or greater, but less than 750 kW for at least 3 of the preceding 12 months. Also, this schedule is available to those customers who were being serviced under the City's small general service (time-of-use) schedule as of November 15, 1993.

This schedule is not available for Electric vehicle (EV) chargers; where EV chargers are the largest ANY TIME Demand (kW) at the point of utility metering.

TYPE OF SERVICE

Delivery of service under this schedule shall be to the customer’s premises at one point of delivery through one meter.

MONTHLY RATES

Customer Charge	\$56.78 per month		
Energy Charge	\$0.0592 per kWh		
Demand Charges			
On-Peak Demand	\$21.57 per kW		
Excess Demand	\$5.19 per kW		
<u>Effective Date</u>	<u>7/1/2024</u>	<u>7/1/2025</u>	<u>7/1/2026</u>
<u>Customer Charge</u>	<u>\$60.00</u>	<u>\$63.00</u>	<u>\$66.00</u>
<u>Energy Charge per kWh</u>	<u>\$0.0606</u>	<u>\$0.0630</u>	<u>\$0.0655</u>
<u>Demand Charges</u>			
<u>On Peak Demand per kW</u>	<u>\$27.00</u>	<u>\$27.75</u>	<u>\$28.50</u>
<u>Excess Demand per kW</u>	<u>\$6.00</u>	<u>\$6.75</u>	<u>\$7.50</u>

DETERMINATION OF DEMAND

The on-peak demand for billing purposes each month shall be the maximum kW demand registered or computed by or from City’s metering facilities during any 15-minute interval within the peak hours of the billing cycle. The peak hours are the hours falling within the time periods every Monday through Friday (excluding holidays) listed by months below:

- Summer period – Coincident with April 15 through October 15: 1:00 – 6:00 p.m.
- Winter period – Coincident with October 16 through April 14: 7:00 – 9:00 a.m.

Excess demand is the maximum demand registered or computed from the City’s metering facilities used during any 15-minute interval in the off-peak hours of the current month, less the on-peak demand. If on-peak demand is greater than the off-peak demand, the excess demand charge will be zero.

Any Time Demand shall be the highest 15-minute demand recorded during the current billing cycle.

SALES TAX

To the above charges will be added any applicable North Carolina sales tax.

CONTRACT PERIOD

The contract period shall not be less than one year, except for short-term, construction, or temporary service, in which case the contract period may be for the period requested by the customer, provided the customer agrees:

1. That the service supplied shall be for a continuous period until discontinued, and
2. That where it is necessary for City to extend lines, erect transformers, or do any work necessary to supply service, except for the installation of a self-contained meter, the Customer shall pay for the line extension in accordance with the City’s customer service policies and may be amended from time to time.

PAYMENT

Bills are due and payable no later than the due date reflected on the bill, which shall be no earlier than twenty (20) days form the date of the bill. If any bill is not so paid, the City has the right to suspend service in accordance with its service regulations.

GENERAL

Service rendered under this schedule is subject to the provisions of the City's service regulations, and any changes therein, substitutions thereof, or additions thereto lawfully made.

SECTION 14: ~~That the following Medium General Service—CP Rate Schedule 12 is hereby adopted effective May 14, 2024.~~

CITY OF NEW BERN
Medium General Service- CP Rate
Schedule 12

AVAILABILITY

This schedule is available on a volunteer basis for electric service used at a single point of delivery, at one of the City's standard voltages, used by any non-residential customer with a monthly demand of less than 750 kW for at least three of the preceding 12 months. Also, this schedule is available as an alternative to those customers who are currently being served under the Medium General Service rates (Schedules 4, 8 and 10) and Medium General Service Time-of-Use rates (Schedule 11).

This schedule is not available for: (1) residential service; (2) breakdown, standby, or supplementary service unless used in conjunction with applicable standby or generation service rider for a continuous period of not less than one year; (3) resale service; (4) Electric vehicle (EV) chargers; where EV chargers are the largest Any Time Demand (kW) at the point of utility metering (5) or whenever the monthly demand exceeds 750kW for at least three months. In order to determine the applicable rate schedule for a customer, the City will review that customer's monthly readings once a year in one-year increments from the month that the customer first started receiving bills under a new schedule.

INITIAL FEES

The customer will be billed for the actual cost for the City to purchase and install the CP meter facilities, communications equipment, and any associated load management equipment as required by the City.

MONTHLY RATES

Customer Charge	\$82.24 per month
Energy Charge	
All kWh	\$0.0601 per kWh
Demand Charge	
Coincident Peak Demand	\$22.12 per kW
Excess Demand	\$5.24 per kW

<u>Effective Date</u>	<u>7/1/2024</u>	<u>7/1/2025</u>	<u>7/1/2026</u>
<u>Customer Charge</u>	<u>\$90.00</u>	<u>\$97.50</u>	<u>\$105.00</u>
<u>Energy Charge per kWh</u>	<u>\$0.0607</u>	<u>\$0.0630</u>	<u>\$0.0655</u>
<u>Demand Charges</u>			
<u>Coincidental Peak Demand per kW</u>	<u>\$27.00</u>	<u>\$27.75</u>	<u>\$28.50</u>
<u>Excess Demand per kW</u>	<u>\$6.00</u>	<u>\$6.75</u>	<u>\$7.50</u>

DETERMINATION OF DEMAND

Coincident Peak Demand shall be the average kW demand measured in the 60-minute interval used by the North Carolina Eastern Municipal Power Agency for wholesale billing purposes during the corresponding month of the Customer's billing.

Excess Demand shall be the highest 15-minute demand recorded during the current billing cycle, less the Monthly Coincident Peak Demand for the current billing cycle.

Any Time Demand shall be the highest 15-minute demand recorded during the current billing cycle.

NOTIFICATION BY THE CITY

The City will use diligent effort to predict each monthly system peak and notify the customer in advance; however, the City is not able to guarantee an accurate prediction, and notice will be provided. Notification by the City will be provided to the customer by direct telephone communication or automatic signal, as mutually agreed. The customer will hold the City harmless in connection with its response to notification.

POWER FACTOR CORRECTION

Where the power factor of the consumer's installation is less than 85%, the City may correct kWh consumption for the month by multiplying by 85 and dividing by the actual power factor.

SALES TAX

To the above will be added any applicable North Carolina sales tax.

PAYMENT

Bills are due and payable no later than the due date reflected on the bill, which shall be no earlier than twenty (20) days from the date of the bill. If any bill is not so paid, the City has the right to suspend service in accordance with its service regulations.

CONTRACT PERIOD

The contract period shall not be less than one year, except for short-term, construction, or temporary service, in which case the contract period may be for the period requested by the customer, provided the customer agrees:

1. That the service supplied shall be for a continuous period until discontinued, and
2. That where it is necessary for the City to extend lines, erect transformers, or do any work necessary to supply service, except for the installation of a self-contained meter, the Customer shall pay for the line extension in accordance with the City's customer service policies as may be amended from time to time.

GENERAL

Service rendered under the Schedule is subject to the provisions of the City's Service Regulations, and any changes therein, substitutions therefore, or additions thereto lawfully made.

SECTION 15. ~~That the following Residential Service Schedule 40 and Schedule 50 is hereby adopted effective May 14, 2024.~~

CITY OF NEW BERN
Residential Service
Schedule 40, Schedule 50

AVAILABILITY

Service under this schedule is available for separately metered and billed supply of alternating electric current to single family residences, including a residential farm where the farm uses are not taken through a separate meter.

A one-ton minimum central air conditioner must be present at these services, and these services must be participating in the 100% Air Conditioner Load Control Program. Under the 100% control, and air conditioner's compressor is turned off for the duration of every load management period. All applicable appliances must have load-management switches installed to participate in this rate schedule.

This schedule is not available for (a) individual motors rated on 15HP; (b) commercial use as in hotels, public inns, motels, auto courts, tourist camps, and trailer camps; (c) separately metered accessory buildings or equipment on residential property not suitable for residential use; or (d) bulk barns or other seasonal high use facilities.

Non-fossil energy sources caused by acts of nature, such as wind or solar, are permitted as supplements to customer's energy requirements provided City is granted the right to install, operate and monitor special equipment to measure customer's load or any part thereof and to obtain any other data necessary to determine the operating characteristics and effects of the installation.

APPLICABILITY

The schedule is applicable to all electric service of the same available type supplied to the customer's premises at one point of delivery through one kilowatt-hour meter in accordance with Schedule 40 and Schedule 50 below.

ADDITIONAL POINTS OF DELIVERY

Additional points of delivery installed on structures at same premises for other than residential dwelling purposes shall be billed under the appropriate General Service Rate Schedule.

TYPE OF SERVICE

The types of service to which this schedule is applicable are alternating current, 60 hertz, either single-phase two or three wires, or three-phase four wires at City's standard voltages of 240 volts or less.

SCHEDULE 40 (Residential 100% A/C Control) 100% Air
Condition Control Discount

For service participating in the 1 (D0Zo Air Conditioner Control, all energy usage over 800 kWh will be discounted 15% based on the Schedule E01 (Standard Residential Service) rate.

MONTHLY RATE

For Single-Phase Service

Basic Customer Charge	\$9.95
Energy Charges	
For the first 300 kilowatt hours	\$0.1018

For >300 to 800 kilowatt hours			\$0.1175
For all additional kilowatt hours			\$0.1013
<u>Effective Date</u>	<u>7/1/2024</u>	<u>7/1/2025</u>	<u>7/1/2026</u>
Customer Charge	\$12.00	\$14.00	\$16.00
<u>Energy Charges</u>			
For the first 300 kWh	\$0.1060	\$0.1105	\$0.1154
For 300 to 800 kWh	\$0.1217	\$0.1262	\$0.1311
For all additional kWh	\$0.1026	\$0.1044	\$0.1065

For Three-Phase Service

The bill computed for single phase service plus \$13.67.

<u>Effective Date</u>	<u>7/1/2024</u>	<u>7/1/2025</u>	<u>7/1/2026</u>
The bill computed for single phase service plus	\$14.35	\$15.05	\$15.80

SCHEDULE 50 (Energy Efficient Residential 100% A/C Control Rate) Energy Conservation Discount
 Where customer notifies company and customer's dwelling complies with the thermal and load management requirements referenced in Schedule E07, all energy usage will be discounted by 5% based on the Schedule E01 (Residential Service) rate in addition to the 100% Air Conditioner Control discount above.

MONTHLY RATES

For Single-Phase Service

Basic Customer Charge			\$9.95
<u>Energy Charges</u>			
For the first 300 kilowatt hours			\$0.0968
For >300 to 800 kilowatt hours			\$0.1116
For all additional kilowatt hours			\$0.0948
<u>Effective Dates</u>	<u>7/1/2024</u>	<u>7/1/2025</u>	<u>7/1/2026</u>
Customer Charge	\$12.00	\$14.00	\$16.00
<u>Energy Charges</u>			
For the first 300 kWh	\$0.1007	\$0.1050	\$0.1096
For 300 to 800 kWh	\$0.1156	\$0.1199	\$0.1245
For all additional kWh	\$0.0940	\$0.0936	\$0.0935

For Three-Phase Service

The bill computed for single phase service plus \$13.67

<u>Effective Date</u>	<u>7/1/2024</u>	<u>7/1/2025</u>	<u>7/1/2026</u>
The bill computed for single phase service plus	\$14.35	\$15.05	\$15.80

THERMAL REQUIREMENTS

CONVENTIONAL HOUSING

In no case shall the structure's heat loss, including duct heat loss, be greater than 0.1 watts (.34 Btuh) per square foot of net heated floor area per degree Fahrenheit temperature difference. Generally, the criteria may be satisfied if the following provisions are met:

- A. Ceilings with an installed insulation thermal resistance value of R-30.

- B. Exterior walls with an installed insulation thermal resistance value of R-13.
- C. Floors over crawl spaces with an installed insulation thermal resistance value of R-19.
- D. All windows should be insulated double pane glass or single pane glass with storm windows.
- E. All exterior doors should be wood with storm doors or insulated metal doors.
- F. Adequate natural or mechanical attic ventilation should be provided.
- G. Effective with building permits issued 7/1/02, the dwelling is all electric (range-oven, heating, air conditioning, water heater, dryer).

MANUFACTURED HOUSING

In no case shall the structure's heat loss, including duct loss, be greater than 0.125 watts (0.43 Btu), per square foot of net heated floor area per degree Fahrenheit temperature difference. Generally, these criteria may be satisfied if the following provisions are met:

- A. Ceilings with an installed insulation thermal resistance value of R-19.
- B. Exterior walls with an installed insulation thermal resistance value of R-13.
- C. Floors over crawlspaces with an installed insulation thermal resistance value of R-19.
- D. All windows should be insulated double pane glass or single pane glass with storm windows.
- E. All exterior doors should be wood with storm doors in insulated metal doors.
- F. Effective with building permits issued 7/1/02, the dwelling is all electric (range-oven, heating, air conditioning, water heater, dryer).

A copy of the manufacturer's certificate stating that the manufactured home in question meets or exceeds the above thermal requirements shall be submitted to the City's Electric Utilities Department in order to obtain the 5% energy efficient discount.

PAYMENT

Bills are due and payable no later than the due date reflected on the bills, which shall be no earlier than twenty (20) days from the date of the bill. If any bill is not so paid, the City has the right to suspend service in accordance with its service regulations.

SALES TAX

To the above charges will be added any applicable North Carolina sales tax.

CONTRACT PERIOD

The contract period shall not be less than one year.

GENERAL

Service rendered under this schedule is subject to the provisions of the City’s service regulations, and any changes therein, substitutions therefore, or additions thereto lawfully made.

SECTION 16. ~~That the following Extra Facilities Charges – Generation Schedule 70 is hereby adopted effective May 14, 2024:~~

CITY OF NEW BERN
Extra Facilities Charges – Generation
Schedule 70

AVAILABILITY

Service under this schedule is intended to be in conjunction with the following rate schedules: Medium General Service CP – Schedule 12, Large General Service #2 CP – Schedule 6, and Large General Service AI CP – Schedule 13. This schedule is available for parallel operation of City-owned, operated and maintained generation systems located on the customer’s premises for the purpose of demand reduction during load management periods. This schedule is to be used in conjunction with the provisions of a generation agreement with the City.

This schedule is available on a first come, first serve basis provided that the aggregate capacity of all the recognized generators operation on the City’s electric system shall not exceed that of the City of New Bern’s generation allocation as required by the North Carolina Eastern Municipal Power Agency policy. If a customer’s proposed installation results in exceeding the aforementioned threshold, the customer will be notified that service under this schedule will not be available.

MONTHLY RATES

Existing City Owned Generator

Based on Generator Nameplate Rating: kW
Capacity Rating _____ \$2.96
per kW

New City Owned Generator

All new generator installations or new replacement generator installations shall be billed in accordance with the City of New Bern Customer Service policies for “Extra Facilities” under Schedule 70.

CONTRACT PERIOD

Service will be provided under this schedule only after a generation agreement is executed including special terms and conditions for the customer’s requirements, if any, which are satisfactory to the City.

PAYMENT

Bills are due and payable no later than the due date reflected on the bill, which shall be no earlier than twenty (20) days from the date of the bill. If any bill is not so paid, the City has the right to suspend service in accordance with its service regulations.

GENERAL

Service rendered under this schedule is subject to the provisions of the City’s service regulations and any changes therein, substitutions therefore, or additions thereto lawfully made.

SECTION 17. ~~That the following Renewable Resource Facilities Credit Schedule 60 is hereby adopted May 14, 2024~~

CITY OF NEW BERN
Renewable Resource Facilities Credit
Schedule 60

AVAILABILITY

Service under this schedule is intended to be in conjunction with the applicable rate schedule and is available for parallel operation of non-City-owned, single-phase, small generation systems, which are rated at 10 kWh or less for residential customers, and 100 kWh or less for non-residential customers. These systems shall be derived from renewable resources including photovoltaic, wind-powered, or bio-mass-fueled generating systems without battery storage located at the customer’s primary residence or business. The generating system that is used in parallel operation with service from the City and located on the customer’s premises must be manufactured, installed, and operated in accordance with all governmental and industry standards, meet all requirements of the local code official, and must fully conform with City of New Bern’s applicable renewable energy interconnection interface criteria. Customer with qualified systems may apply for NC Green Power credits.

This schedule is available on a first come, first serve basis, provided that the aggregate capacity of all the customer generators operating pursuant to this schedule shall not exceed 5% of the City of New Bern’s retail peak load for the prior calendar year. If a customer’s proposed installation results in exceeding the aforementioned 5% threshold, the customer will be notified that service under this schedule is not available.

TYPE OF SERVICE

The only type of service to which this Schedule is applicable is alternating current, 60 hertz, single-phase, or three-phase, two, three, or four wires at company’s standard voltages of 480 volts or less.

MONTHLY CREDIT

Energy Credit:

_____ All kWh delivered per kWh

_____ \$0.0487 per kWh

CONTRACT PERIOD

Service will be provided under this schedule only after a service agreement is executed including special terms and conditions for the customer's requirements, if any, which are satisfactory to the City.

SPECIAL CONDITIONS

1. Renewable energy generators, non-fossil energy sources caused by acts of nature such as wind or solar, are permitted as supplements to the customer's energy requirements provided the City is granted the right to install, operate, and monitor special equipment to measure the customer's load or any part thereof, and can obtain any other data necessary to determine the operating characteristics and effects of the installation.
2. All installations of non-City-owned, small generation systems to be operated in parallel with the City electric system shall be required to comply with the North Carolina Utilities Commission (NCUC) "Standard for Interconnecting Small Generation 100 kW or less with Electric Power Systems (EPS)." It is the customer's responsibility to ensure compliance with all such NCUC requirements, file all applications, and resolve all fees associated with the NCUC's interconnection standard prior to the parallel operation of any installed equipment.
3. Customers with renewable energy generators, as outlined above, that are designated to operate in excess of the customer's load at any time are required to function in compliance with the City's Supplemental Power Supply contract with the North Carolina Eastern Municipal Power Agency. Under this requirement, each customer will be required to enter into a unique Electric Service Agreement with the City detailing the specifications of the installation the rate schedule to be followed for the power supplied by the renewable resource generator. The customer's service shall be metered with two meters – one to measure all energy provided by the City and used by the customer, and all other to measure the amount of energy generated by the customer's renewable energy generator.
4. All customers applying for installations of photovoltaic non-City-owned, small generation systems to be operated in parallel with the City electric system shall be required to complete and comply with the City of New Bern's Application and Procedures for Interconnecting a Certified Photovoltaic Generating Facility ("Application"). The customer must complete the Application and submit the same to the City prior to receiving service under this schedule.
5. All customers who install a non-City-owned, small generation system to be operated in parallel with the City electric system shall be required to submit a certification of general liability insurance naming the City as additional insured in the amount of \$100,000 per occurrence. Certifications are to be submitted for review and approval by the City on an annual basis as long as the renewable resource generator is interconnected with the City's electric system.
6. In the event that the City determines that it is necessary to install a dedicated transformer or other equipment to protect the safety and adequacy of electric service provided to other City customers, the customer shall pay a Monthly Facilities Charge of 2% of the total installed

cost of such additional facilities. The Monthly Facilities Charge shall not be less than \$25.00.

7. The City reserves the right to test the customer’s alternative energy generator for compliance with the applicable interface criteria. Should the City determine that the customer’s installation is in violation of such criteria, the City will disconnect the alternative energy generator from the City’s electric distribution system. The customer’s alternative energy generator will remain disconnected until the installation is brought back into compliance with the applicable interface criteria.

GENERAL

Service rendered under this schedule is subject to the provisions of the City’s service regulations and any changes therein, substitutions therefore, or additions thereto lawfully made.

~~SECTION 18. That the following Commercial/Industrial Load Data Profile Service, Schedule LPDS is hereby adopted effective May 14, 2024:~~

CITY OF NEW BERN
Commercial/Industrial Load Profile Data Service
Schedule – LPDS

AVAILABILITY

This schedule is available for City of New Bern commercial and industrial customers receiving electric service at a single point of delivery and utilizing any of the commercial or industrial rate schedules. This schedule is not available for residential service.

TYPE OF SERVICE

This service provides customers with self-service access to load profile meter information via an internet portal. Service requires a customer provided internet service to access the service.

SET UP FEE

One time set up fee per meter				\$150.00
<u>Effective Date</u>	<u>7/1/2024</u>	<u>7/1/2025</u>	<u>7/1/2026</u>	
<u>One time set up fee per meter</u>	<u>\$157.50</u>	<u>\$165.40</u>	<u>\$173.65</u>	

MONTHLY RATES

Day After Data Service: 15-minute interval data updated the day after consumption				\$40.50
Same Day Hourly Data Service: 15-minute interval data updated hourly				\$90.00
<u>Effective Date</u>	<u>7/1/2024</u>	<u>7/1/2025</u>	<u>7/1/2026</u>	
<u>Day After Data Service: 15-minute interval data updated the day after</u>	<u>\$42.50</u>	<u>\$44.65</u>	<u>\$46.90</u>	
<u>Same Day Hourly Data Service: 15-minute interval data updated hourly</u>	<u>\$94.50</u>	<u>\$99.25</u>	<u>\$104.20</u>	

AVAILABILITY OF SERVICE

The City will use reasonable effort to ensure the availability of data is not delayed or interrupted, however, the City is not able to guarantee service. The City shall not be liable for force majeure for any failure to deliver service beyond its control and not limited to acts of God, acts of public enemy, natural disasters, severe weather or interruptions in power. The customer shall indemnify and hold the City harmless with respect to all costs and expense whatsoever, including, but not limited to, attorney's fees and court costs incurred in connection with, or as a result of, any and all such claims for damage arising out of or in connection with its use of this service.

SALES TAX

To the above ~~charges~~charges will be added any applicable North Carolina sales tax.

PAYMENT

Bills are due and payable no later than the due date reflected on the bill, which shall be no earlier than twenty (20) days from the date of the bill. If any bill is not so paid, the City has the right to suspend service in accordance with its service regulations.

CONTRACT PERIOD

The contract period shall not be less than one year and continuously renew. The contract may be terminated by either party in whole or part for convenience upon a ninety (90) day written notice.

GENERAL

Service rendered under this schedule is subject to the provisions of the City's service regulations, and any changes therein, substitutions therefore, or additions thereto lawfully made.

SECTION 19: ~~That the following Unmetered Service Schedule UMS is hereby adopted effective May 14, 2024.~~

CITY OF NEW BERN
Unmetered Service
Schedule UMS

AVAILABILITY

This service is available at a single point of delivery when service is rendered on an unmetered basis and the Customer's total nameplated electrical requirement is demonstrated to be 100 watts or less. Service is limited to Federal, State, Local Government and North Carolina registered franchise telecommunication service providers.

SERVICE

Each point of delivery shall require an application for service and be considered as the contract location.

The Customer shall install a current limiting device on the load side of the electric utility's point of delivery and comply with local inspection authorities' requirements. The City reserves the right to inspect the Customer's equipment at any time to verify actual load. Service is limited to 120 volts, single phase and locations no further than 100 feet from the 120 volt source.

Customer attachments are prohibited on electric utility structures and/or poles except where the Customer has established a pole attachment agreement with the utility. The customer's point of service cannot interrupt service to other utility customers or connect in between the public electric system and the point of delivery to other customers.

The City's electric utility reserves the right to determine the feasibility of providing service and refuse service based such feasibility. In the event of a Customer's failure to notify the City of an increase in load, the City reserves the right to refuse to serve this contract location thereafter under the provision and to require Customer rewire to permit metered service.

This service is not available for short-term, construction, temporary, breakdown, back-up standby or lighting service. Monthly pole rental service is not available with this schedule. Upon request, the utility may consider the feasibility of providing the Customer a pole. The cost of the pole shall include the electric utilities material, labor and equipment cost. The sale and installation of a pole/s shall require a separately administered agreement.

MONTHLY RATES

The monthly rates do not include charges for additional facilities, poles, underground service and/or other services provided.

Customer Charge	\$20.65		
<hr/>			
<i>Energy Charges</i>			
Wattage rating of 10W or less	\$0.90		
Wattage rating of 11W but not greater than 50W	\$1.90		
Wattage rating of 51W but not greater than 100W	\$3.80		
<u>Effective Date</u>	<u>7/1/2024</u>	<u>7/1/2025</u>	<u>7/1/2026</u>
<u>Customer Charge</u>	<u>\$25.00</u>	<u>\$29.50</u>	<u>\$34.00</u>
<u>Energy Charges</u>			
<u>Wattage rating of 10w or less</u>	<u>\$0.9500</u>	<u>\$0.9900</u>	<u>\$1.04</u>
<u>Wattage rating of 11w but not greater than 50w</u>	<u>\$2.00</u>	<u>\$2.10</u>	<u>\$2.20</u>
<u>Wattage rating of 51w but not greater than 100w</u>	<u>\$3.99</u>	<u>\$4.19</u>	<u>\$4.40</u>

SALES TAX

To the above charges will be added any applicable North Carolina sales tax.

PAYMENTS

Bills are due and payable no later than the due date reflected on the bill, which shall be no earlier than twenty (20) days from the date of the bill. If any bill is not so paid, the City has the right to suspend service in accordance with its service regulations.

CONTRACT PERIOD

The contract period shall not be less than three years for overhead service and not less than five years for underground service and shall extend from year to year thereafter until terminated by the customer or the City. The Customer may terminate the agreement before the expiration of the initial contract period by paying to the

City the sum of money equal to 40% of the bills which otherwise would have been rendered for the unexpired months of the initial contract.

The City may require the customer to initially make a termination deposit which will not exceed the termination amount computed in accordance with the above paragraph. Such termination deposit will be refunded in equal amounts at the end of each full year service is rendered. This annual refund will be the termination deposit divided by the number of years in the contract period.

GENERAL

Service rendered under this schedule is subject to the provisions of the City's service regulations, and any changes therein, substitutions therefore, or additions thereto lawfully made.

SECTION 200. ~~That the following Area Lighting Schedule 04 is hereby adopted effective May 14, 2024~~

CITY OF NEW BERN
Area Lighting Schedule
Schedule 04

AVAILABILITY

This schedule is available for service supplied to the lighting of outdoor areas, private streets, and private driveways by means of mercury vapor or sodium vapor lighting units. Lighting units will be bracket mounted on City-owned poles, and the mercury vapor lamps will be color corrected.

This Schedule is not available for the lighting of dedicated streets or highways.

SERVICE

Prior to installing area lighting facilities, the customer and the City must execute the City's form entitled "Application for Area Lighting Service". The service supplied by the City will include the installation and operation, according to City standards and requirements, of the area lighting units, and will include the furnishing of electricity required for the illumination of the lamps from dusk to dawn. After the customer has

notified the City that a lamp is not burning, the City will perform, as soon as practicable during regular working hours, the necessary maintenance to restore illumination. The lumen rating of the lighting units listed under the Monthly Rate indicates the class of lamp.

MONTHLY RATES

Overhead Service

BASIC RATE: The basic rate per fixture defined below will be billed for installations of standard area lighting fixtures installed on City's system distribution poles. The basic rate does not include the monthly charges for additional facilities, area lighting poles, underground service or any contribution required under this Schedule:

	Monthly Charge	Monthly kWh		
	Per Fixture	7/1/2024	7/1/2025	7/1/2026
<u>Effective Dates</u>				
<u>Mercury Vapor (Obsolete – Not available for new or replacement)</u>				
<u>7,000 lumen semi enclosed 175w</u>		<u>\$11.95</u>	<u>\$12.55</u>	<u>\$13.20</u>
<u>7,000 lumen 175w</u>		<u>\$13.95</u>	<u>\$14.65</u>	<u>\$15.40</u>
<u>60,000 lumen 1000w Flood</u>		<u>\$46.85</u>	<u>\$49.20</u>	<u>\$51.65</u>
<u>Sodium Vapor (Obsolete – Not available for new or replacement)</u>				
<u>9,500 lumen 100w</u>		<u>\$15.90</u>	<u>\$16.70</u>	<u>\$17.55</u>
<u>22,000 lumen 150w</u>		<u>\$19.70</u>	<u>\$20.70</u>	<u>\$21.75</u>
<u>27,500 lumen 250w Flood</u>		<u>\$22.40</u>	<u>\$23.50</u>	<u>\$24.70</u>
<u>50,000 lumen 400w Flood</u>		<u>\$34.80</u>	<u>\$36.55</u>	<u>\$38.40</u>
<u>Metal Halide (Obsolete – Not available for new or replacement)</u>				
<u>Cobra Head 500w</u>		<u>\$34.80</u>	<u>\$36.55</u>	<u>\$38.40</u>
<u>1000w Flood</u>		<u>\$46.85</u>	<u>\$49.20</u>	<u>\$51.65</u>
<u>LED</u>				
<u>50w</u>		<u>\$19.70</u>	<u>\$20.70</u>	<u>\$21.75</u>
<u>300w Flood</u>		<u>\$34.80</u>	<u>\$36.55</u>	<u>\$38.40</u>
<u>Area Lighting Poles Served by</u>				
<u>Mercury Vapor (Obsolete – Not Available for new or replacement service)</u>				
<u>7,000 lumen semi enclosed 175w</u>	<u>\$11.40</u>			<u>69</u>
<u>7,000 lumen 175 w</u>	<u>\$13.27</u>			<u>69</u>
<u>21,000 lumen 400 w</u>	<u>\$20.70</u>			<u>149</u>
<u>21,000 lumen 400 w flood</u>	<u>\$25.58</u>			<u>160</u>
<u>60,000 lumen 1000w</u>	<u>\$40.70</u>			<u>382</u>
<u>60,000 lumen flood 1000 w flood</u>	<u>\$44.60</u>			
<u>Sodium Vapor (Obsolete – Not Available for new or replacement service)</u>				
<u>5,000 lumen semi enclosed</u>	<u>\$9.28</u>			
<u>9,500 lumen 100 w</u>	<u>\$15.12</u>			<u>46</u>
<u>22,000 lumen 150 w</u>	<u>\$18.74</u>			<u>86</u>
<u>27,500 lumen flood 250w</u>	<u>\$21.32</u>			<u>109</u>
<u>27,500 lumen 400 w</u>	<u>\$29.54</u>			<u>152</u>
<u>50,000 lumen flood 400 w</u>	<u>\$33.15</u>			<u>168</u>

Retrofit Sodium Vapor (*Retrofitted Prior to September 19, 1983) (Obsolete – Not Available for new or replacement service)

12,000 lumen 150w	\$17.09	59
38,000 lumen	\$24.34	135

Metal Halide – Obsolete – Not Available for new or replacement service)

500w cobra head	\$33.15	168
1000w flood	\$44.60	382

*A retrofit sodium vapor unit is a mercury vapor unit retrofitted with a sodium vapor lamp. LED

50w	\$18.74	18
300w flood	\$33.15	108

Underground Service

For underground service, the monthly bill will be increased by \$4.90 per pole, in lieu thereof, a one-time contribution of \$246.51 per pole. The monthly pole charge, if selected, may be terminated at any time upon payment by Customer of the one-time contribution. The monthly pole charge defined below will also be applicable to underground service. A monthly fee per pole will apply for lighting connected by underground service as shown in the rates below. In lieu of the monthly fee, customers may pay a one-time contribution at the time of installation. The monthly fee may be terminated at any time up payment of the one-time contribution.

<u>Effective Date</u>	<u>7/1/2024</u>	<u>7/1/2025</u>	<u>7/1/2026</u>
<u>Underground per pole (per month)</u>	<u>\$5.15</u>	<u>\$5.40</u>	<u>\$5.65</u>
<u>Underground one time contribution per pole (per month)</u>	<u>\$258.84</u>	<u>\$271.78</u>	<u>\$285.37</u>

Area Lighting Poles

Monthly Charge Per Pole

A monthly fee per pole will apply when lighting is provided by use of a City owned pole as shown in the rates below.

Wood	\$2.93
Special Metal or Fiberglass Pot	\$6.94

<u>Effective Date</u>	<u>7/1/2024</u>	<u>7/1/2025</u>	<u>7/1/2026</u>
<u>Wood per pole (per month)</u>	<u>\$3.10</u>	<u>\$3.25</u>	<u>\$3.40</u>
<u>Special Metal or Fiberglass per pole (per month)</u>	<u>\$7.30</u>	<u>\$7.65</u>	<u>\$8.05</u>

SALES TAX

To the above charges will be added any applicable North Carolina sales tax.

ADDITIONAL FACILITIES

- Multiple area lighting fixtures may be installed per pole subject to the City’s review and approval. The monthly charge for each additional fixture will be the charge in accordance with the Monthly Rate for that fixture, plus 2% of the estimated installed cost of the facilities necessary to serve the multiple fixture installation excess of that normally required to provide standard area lighting service.

2. For each distribution transformer and/or primary conductor extension, 2% of the estimated installed cost of the required facilities.
3. For an underground circuit in excess of 250 feet for an area lighting pole, 2% of the estimated installed cost of the excess circuit.
4. For a metal pole, 2% of the estimated installed cost of overhead or underground metal poles requiring special construction of features which are in excess of the estimated installed cost of standard underground metal poles.
5. When more energy efficient and otherwise more practical lighting units become available to the City, they will be made available for use under this schedule. The appropriate charge for such units will be developed by the City Electric Department. Said charges are to be incorporated by amendment to this Schedule by the City.

NON-REFUNDABLE CONTRIBUTION

1. In the event that rock, unstable soil, or other conditions require the use of materials and methods of installation other than the City's normal materials and methods, the customer will contribute the additional cost incurred as a result thereof.
2. The customer will contribute the estimated cost of installing cables under paved or landscaped surface areas; however, the customer may cut and replace the pavement or surface in lieu of making the contribution.
3. Service supplied under the Monthly Rate in this schedule does not include the conversion of existing overhead secondary conductors to underground. Should the customer desire such a conversion under this schedule, the customer will contribute the City, in addition to the applicable contribution above, the estimated net loss in salvage value of the overhead facilities being removed. The customer will thereafter pay the applicable rate for underground service.

PAYMENT

Bills are due and payable no later than the due date reflected on the bill, which shall be no earlier than twenty (20) days from the date of the bill. If any bill is not so paid, the City has the right to suspend service in accordance with its service regulations.

CONTRACT PERIOD

The contract period shall not be less than three years for overhead service and not less than five years for underground service and shall extend from year to year thereafter until terminated by the customer or the City. The customer may terminate the agreement before the expiration of the initial contract period by paying to the City a sum of money equal to 40% of the bills which otherwise would have been rendered for the unexpired months of the initial contract period.

The City may require the customer to initially make a termination deposit which will not exceed the termination amount computed in accordance with the above paragraph. Such termination deposit will be refunded in equal

amounts at the end of each full year service is rendered. This annual refund will be the termination deposit divided by the number of years in the contract period.

GENERAL

Service rendered under this schedule is subject to the provisions of the City of New Bern Customer Service Policies.

SECTION 21+3. That the following ~~Street Lighting Service Schedule 32-A~~ is hereby adopted effective May 14, 2024

CITY OF NEW BERN
Street Lighting Service
Schedule 32-A

AVAILABILITY

This schedule is available for service supplied in the lighting of dedicated public streets, highways, and municipally owned and operated public parks and public parking lots, by lighting fixtures mounted on City-owned poles for the City of New Bern.

SERVICE

The service supplied by the City will include the installation of a street lighting system, according to the City's standards and requirements, which will be owned, maintained, and operated by the City, including the furnishing of the electricity required for the illumination of the lamps from dusk to dawn. The lumen ratings of lighting units listed under the monthly rate indicates the general class of the lamp.

MONTHLY RATES

Overhead Service

Basic Rate: The basic rate per fixture defined below will be billed for installations of standard street lighting fixtures installed on the City's electric system distribution poles. The basic rate does not include the monthly charges for additional facilities, street lighting poles, underground service, or any contribution required under this schedule and under the City of New Bern Customer Service Policies.

Monthly Charge Per Fixture

Mercury Vapor (Obsolete Not available for new or replacement installation)	
7,000 Lumen semi-enclosed (175w)	\$8.44
7,000 Lumen (175w)	\$8.44
21,000 Lumen (400w)	\$13.18

<u>Effective Date</u>	<u>7/1/2024</u>	<u>7/1/2025</u>	<u>7/1/2026</u>
<u>Mercury Vapor (Obsolete not available for new or replacement)</u>			
<u>7,000 lumen 175w</u>	<u>\$8.85</u>	<u>\$9.30</u>	<u>\$9.75</u>
<u>Metal Halide (Obsolete not available for new or replacement)</u>			
<u>400w Flood</u>	<u>\$13.85</u>	<u>\$14.55</u>	<u>\$15.30</u>
<u>1000w Flood</u>	<u>\$15.20</u>	<u>\$15.95</u>	<u>\$16.75</u>
<u>Sodium Vapor (Obsolete not available for new or replacement)</u>			
<u>9,500 lumen 100w</u>	<u>\$8.20</u>	<u>\$8.60</u>	<u>\$9.05</u>
<u>22,000 lumen 150w</u>	<u>\$8.85</u>	<u>\$9.30</u>	<u>\$9.75</u>
<u>27,500 lumen 250w</u>	<u>\$11.30</u>	<u>\$11.85</u>	<u>\$12.45</u>
<u>50,000 lumen 400w</u>	<u>\$13.85</u>	<u>\$14.55</u>	<u>\$15.30</u>
<u>LED</u>			
<u>5,240 lumen 39w – Acorn</u>	<u>\$19.75</u>	<u>\$20.75</u>	<u>\$21.80</u>
<u>9,505 lumen 70w – Cobra</u>	<u>\$13.10</u>	<u>\$13.75</u>	<u>\$14.45</u>
<u>10,868 lumen 110w - Town & Country</u>	<u>\$18.50</u>	<u>\$19.45</u>	<u>\$20.40</u>
<u>15,501 lumen 160w - Gardco</u>	<u>\$40.80</u>	<u>\$42.85</u>	<u>\$33.35</u>
<u>Metal Halide (Obsolete Not available for new or replacement installation)</u>			
<u>400w flood</u>			<u>\$13.18</u>
<u>1000w flood</u>			<u>\$14.47</u>
<u>Sodium Vapor (Obsolete Not available for new or replacement installation)</u>			
<u>9,500 Lumen (100w)</u>			<u>\$7.79</u>
<u>22,000 Lumen (150w)</u>			<u>\$8.44</u>
<u>27,500 Lumen (250w)</u>			<u>\$10.77</u>
<u>50,000 Lumen (400w)</u>			<u>\$13.18</u>
<u>50,000 Lumen (400 w flood)</u>			<u>\$14.47</u>
<u>LED</u>			
<u>5,240 Lumen (39w) Acorn</u>			<u>\$18.81</u>
<u>9,505 Lumen (72w) Cobra</u>			<u>\$12.46</u>
<u>10,868 Lumen (110w) Town & Country</u>			<u>\$17.62</u>
<u>15,501 Lumen (160w) Gardco</u>			<u>\$38.85</u>

ADDITIONAL FACILITIES

1. Special poles and lighting fixtures normally not provided by the utility can be provided at the City's cost for fixtures.
2. For each primary conductor extension, 2% of the estimated installed cost of the required facilities.
3. For a bracket or mast arm in excess of 6 feet for underground service or 16 feet for overhead service, 2% of the estimated installed cost of the required facilities of that for standard facilities.
4. For an underground circuit in excess of 250 feet for a street lighting pole, 2% of the estimated installed cost of the excess circuit. Customer has the option of making a non-refundable contribution of the

estimated installed cost of an underground circuit in excess of 250 feet per span in lieu of paying the monthly facilities charge for such excess circuit.

5. For a metal pole, 2% of the estimated installed cost of overhead or underground metal poles requiring special construction or features which are in excess of the estimated installed cost of standard underground metal poles.
6. When more energy efficient and better suited lighting units become available to the City, they will be made available for use under this schedule. The appropriate charges for such units will be developed by the City Electric Department. Said charges are to be incorporated by amendment to this schedule by the City.

NON-REFUNDABLE CONTRIBUTION

1. In the event that rock, unstable soil, or other conditions require the use of materials and methods of installation other than City's normal materials and methods, the customer will contribute the additional cost incurred as a result thereof.
2. The customer will contribute the estimated cost of installing cables under paved or landscaped surface area; however, the customer may cut and replace the pavement or surface in lieu of making the contribution.
3. Service supplied under the Monthly Rate in this schedule does not include the conversion of existing overhead street-lighting circuits to underground. Should the customer desire such a conversion under this schedule, customer will pay to the City, in addition to the applicable contribution and charges herein, the estimated net investment depreciated, plus removal cost, less salvage value of the overhead conductor being removed.

SALES TAX

To the above charges will be added any applicable North Carolina sales tax.

PAYMENT

Bills are due and payable no later than the due date reflected on the bill, which shall be no earlier than twenty (20) days from the date of the bill. If any bill is not so paid, the City has the right to suspend service in accordance with its service regulation.

SECTION 2242. ~~That the following Street Lighting Service Schedule 32-B is hereby adopted effective May 14, 2024.~~

CITY OF NEW BERN
Street Lighting Service

Schedule 32-B (Residential Subdivision)

AVAILABILITY

This schedule is available for service supplied in the lighting of residential dedicated public streets by means of mercury vapor or sodium vapor lighting units installed within residential subdivisions, consisting of single or duplex dwelling units, located outside the corporate limits of a municipality at the time of the installation. This schedule is not available to supply service for the lighting of parking lots, shopping centers, other public or commercial areas within the residential subdivision, or areas not specifically provided for by the provisions herein.

SERVICE

The service supplied by the City will include the installation of a street lighting system, according to the City's standards and requirements, which will be owned, maintained, and operated by the City, including the furnishing of the electricity required for the illumination of the lamps from dusk to dawn. Lighting units will be located by the City to provide the most uniform lighting possible in the residential area. The lumen ratings of the lighting units furnished under the monthly rate indicate the class of lamp.

MONTHLY RATES

The following amount will be added to each monthly bill rendered for residential electric service within the subdivision:

Overhead Distribution Area

Bracket-mounted, enclosed luminaire on approved wood pole 1 light	
Per 10 customers or major fraction thereof	
7,000 lumen mercury vapor	\$1.47 per customer
9,500 lumen sodium vapor	\$1.47 per customer
1 light per 5 customers or major fraction thereof	
7,000 lumen mercury vapor	\$2.94 per customer
9,500 lumen sodium vapor	\$2.94 per customer

<u>Effective Date</u>	<u>7/1/2024</u>	<u>7/1/2025</u>	<u>7/1/2026</u>
<u>Bracket mounted, enclosed luminaire on approved wood pole 1 light</u>			
<u>Per 10 customers or major fraction thereof</u>			
<u>7,000 lumen Mercury Vapor (per customer)</u>	<u>\$1.54</u>	<u>\$1.62</u>	<u>\$1.70</u>
<u>9,500 lumen Sodium Vapor (per customer)</u>	<u>\$1.54</u>	<u>\$1.62</u>	<u>\$1.70</u>
<u>1 light per 5 customers or major fraction thereof</u>			
<u>7,000 lumen Mercury Vapor (per customer)</u>	<u>\$3.09</u>	<u>\$3.24</u>	<u>\$3.40</u>
<u>9,500 lumen Sodium Vapor (per customer)</u>	<u>\$3.09</u>	<u>\$3.24</u>	<u>\$3.40</u>

Underground Distribution Area

Bracket-mounted, enclosed luminaire on approved wood pole 1 light	
Per 10 customers or major fraction thereof	
7,000 lumen mercury vapor	\$2.09 per customer
9,500 lumen mercury vapor	\$2.09 per customer
1 light per 5 customers or major fraction thereof	
7,000 lumen mercury vapor	\$4.18 per customer
9,500 lumen mercury vapor	\$4.18 per customer

<u>Effective Date</u>	<u>7/1/2024</u>	<u>7/1/2025</u>	<u>7/1/2026</u>
<u>Bracket-mounted, enclosed luminaire on approved wood pole 1 light</u>			
<i>Per 10 customers or major fraction thereof</i>			
<u>7,000 lumen Mercury Vapor</u>	<u>\$2.19</u>	<u>\$2.30</u>	<u>\$2.42</u>
<u>9,500 lumen Mercury Vapor</u>	<u>\$2.19</u>	<u>\$2.30</u>	<u>\$2.42</u>
<i>1 lighter per 5 customers or major fraction thereof</i>			
<u>7,000 lumen Mercury Vapor</u>	<u>\$4.40</u>	<u>\$4.60</u>	<u>\$4.85</u>
<u>9,500 lumen Mercury Vapor</u>	<u>\$4.40</u>	<u>\$4.60</u>	<u>\$4.85</u>
<u>Bracket mounted, enclosed luminaries on standard metal pole</u>			
<i>1 light per 10 customers or major fraction thereof</i>			
<u>7,000 lumen Mercury Vapor per customer</u>	<u>\$2.50</u>	<u>\$2.60</u>	<u>\$2.75</u>
<u>9,500 lumen Sodium Vapor per customer</u>	<u>\$2.50</u>	<u>\$2.60</u>	<u>\$2.75</u>
<i>1 light per 6 customers or major fraction thereof</i>			
<u>7,000 lumen Mercury Vapor per customer</u>	<u>\$4.20</u>	<u>\$4.40</u>	<u>\$4.65</u>
<u>Approved post mounted type luminaries</u>			
<i>1 light per 10 customers or major fraction thereof</i>			
<u>7,000 lumen Mercury Vapor per customer</u>	<u>\$2.50</u>	<u>\$2.60</u>	<u>\$2.75</u>
<u>9,500 lumen Sodium Vapor per customer</u>	<u>\$2.50</u>	<u>\$2.60</u>	<u>\$2.75</u>
<i>1 light per 6 customers or major fraction thereof</i>			
<u>7,000 lumen Mercury Vapor per customer</u>	<u>\$4.20</u>	<u>\$4.40</u>	<u>\$4.65</u>
<u>9,500 lumen Sodium Vapor per customer</u>	<u>\$4.20</u>	<u>\$4.40</u>	<u>\$4.65</u>

Bracket-mounted, enclosed luminaries on standard metal pole		
1 light per 10 customers or major fraction thereof		
7,000 lumen mercury vapor		\$2.38 per customer
9,500 lumen sodium vapor		\$2.38 per customer
1 light per 6 customers or major fraction thereof		
7,000 lumen mercury vapor		\$3.99 per customer
Approved Post Mounted Type Luminaries		
1 Light per 10 customers or major fraction thereof		
7,000 lumen mercury vapor		\$2.38 per customer
9,500 lumen sodium vapor		\$2.38 per customer
1 Light per 6 customers or major fraction thereof		
7,000 lumen mercury vapor		\$3.99 per customer
9,500 lumen sodium vapor		\$3.99 per customer

ANNEXATION CONSIDERATION

If any of the following conditions exist, the developer of the subdivision will be required to obtain from the municipal governing agency, its written approval of the street lighting service being provided under this schedule, and the number and locations of the lights to be installed.

1. The subdivision abuts a boundary of the municipality.

2. It is known that the subdivision will be annexed into the municipality.
3. The municipal governing agency has enacted a subdivision control ordinance that applies to the subdivision or any portion thereof.

If the subdivision is subsequently annexed and the municipality accepts the street lighting under a street lighting service contract on the rate for the equivalent lighting unit, the following will apply:

1. Overhead Distribution: If the municipality accepts the street lighting service under Street Lighting Service Schedule, no monthly customer charge will be applied to the subdivision residents.
2. Underground Distribution: If the municipality accepts the street lighting service under Street Lighting Service Schedule and agrees to pay the contribution under the schedule for the street lighting system, no monthly customer charge will be applied to the subdivision residents.

If the subdivision is subsequently annexed and the municipality does not accept the installed street lighting under a street lighting contract, the service will continue to be provided under this Schedule with the applicable monthly charge.

SECTION 2353. ~~That the following Street Lighting Service Schedule 32-C is hereby adopted effective May 14, 2024:~~

CITY OF NEW BERN
Street Lighting Service
Schedule 32-C

AVAILABILITY

This Schedule is available for service supplied in the lighting of residential dedicated public streets by means of sodium vapor lighting units installed within residential subdivisions, consisting of single or duplex dwelling units, located within the city limits of the City of New Bern. This Schedule applies to all developments in which streets have not been accepted for maintenance by the City under the Land Use Ordinance. This Schedule is not available to supply service for the lighting of parking lots, shopping centers, other public or commercial areas within the residential subdivision, or areas not specifically provided for by the provisions herein.

SERVICE

The service supplied by the City will include the installation of a street lighting system, according to City's standards and requirements, which will be owned, maintained, and operated by the City, including the furnishing of the electricity required for the illumination of the lamps from dusk to dawn. Lighting units will be

located by the City to provide the most uniform lighting possible in the residential area. The lumen ratings of the lighting units furnished under the monthly rate indicate the class of lamp.

The developer shall open a street lighting account and sign a standard lighting contract with the City of New Bern.

The developer shall pay for all streetlights per City of New Bern Schedule 32-C until the street or streets within the development are accepted for maintenance under the Land Use Ordinance of the City of New Bern, at which time the City of New Bern will assume the cost of the lighting.

All streetlights shall be made operational once the electric system is energized, at which time the developer will become responsible for a monthly payment to the City of New Bern per the City of New Bern Street Lighting Service Schedule 32-C.

MONTHLY RATES

Overhead Service

Basic Rate: The basic rate per fixture defined below will be billed for installations of standard street lighting fixtures installed on City's system distribution poles. The basic rate does not include the monthly charges for additional facilities, street lighting poles, underground service, or any contribution required under this Schedule and under the Street Lighting Service Regulations.

Monthly Charge Per Fixture

Sodium Vapor 22,000			
Lumen (150w)	\$8.44		
50,000 Lumen (400w)	\$13.18		
50,000 Lumen (400w flood)	\$14.47		
HPS 250w	\$10.77		
<u>Effective Rate</u>	<u>7/1/2024</u>	<u>7/1/2025</u>	<u>7/1/2026</u>
<u>Sodium Vapor</u>			
<u>22,000 lumen 150w</u>	<u>\$8.85</u>	<u>\$9.30</u>	<u>\$9.75</u>
<u>50,000 lumen 400w</u>	<u>\$13.85</u>	<u>\$14.55</u>	<u>\$15.30</u>
<u>50,000 lumen 400w Flood</u>	<u>\$15.20</u>	<u>\$15.95</u>	<u>\$16.75</u>
<u>High Pressure Sodium</u>			
<u>250w</u>	<u>\$11.30</u>	<u>\$11.85</u>	<u>\$12.45</u>

ADDITIONAL FACILITIES

1. For primary conductor extensions, 2% of the estimated installed cost of the required facilities will be charged to the customer as outlined in the Customer Service Policies section regarding additional facilities.
2. For a bracket or mast arm in excess of 6 feet for underground service or 16 feet for overhead service, 2% of the estimated installed cost of the required facilities of that for standard facilities will be charged to the customer as outlined in the Customer Service Policies section regarding additional facilities.
3. For an underground circuit in excess of 250 feet for the installation of a street light pole, 2% of the estimated installed cost will be considered an additional facility. Customer has the option of making a

non-refundable contribution of the estimated install cost of an underground circuit in excess of 250 feet per span in lieu of paying the monthly facilities charge for each excess circuit.

4. For a metal pole, 2% of the estimated installed cost of overhead or underground metal poles requiring special construction or features which are in excess of the estimated installed cost of standard underground metal poles will be charged to the customer as outlined in the Customer Service Policies section regarding additional facilities.
5. When more energy-efficient and better-suited lighting becomes available to the City, they will be made available for use under this Schedule. The appropriate charges for such units will be developed by the City Electric Utility Department. Said charges are to be incorporated by amendment to this Schedule by the City.

NON-REFUNDABLE CONTRIBUTION

1. In the event that rock, unstable soil, or other conditions require the use of materials and methods of installation other than City's normal materials and methods, customer will contribute the additional cost incurred thereby.
2. Customer will contribute the estimated cost of installing cables under paved or landscaped surface areas; however, Customer may cut and replace the pavement or surface in lieu of making the contribution.
3. Service supplied under the Monthly Rate in this Schedule does not include the conversion of existing overhead street-lighting circuits to underground. Should the customer desire such a conversion under this Schedule, customer will pay to the City, in addition to the applicable contribution and charges herein, the estimated net investment depreciated, plus removal cost, less salvage value the overhead conductor being removed.

SALES TAX

To the above charges will be added any applicable North Carolina sales tax.

PAYMENT

Bills are due and payable no later than the due date reflected on the bill, which shall be no earlier than twenty (20) days from the date of the bill. If any bill is not so paid, the City has the right to suspend service in accordance with its service regulations.

CONTRACT PERIOD

The Contract Period shall not be less than 10 years.

GENERAL

Service rendered under this Schedule is subject to the provisions of City's Street Lighting Service Regulations filed at City Hall.

SECTION 24. That the foregoing ordinance be kept on file in the Office of the City Clerk.

SECTION ~~25~~5. That previous ordinances in conflict with this ordinance are hereby replaced.

SECTION ~~26~~6. That the rates established by this Ordinance shall be in full force and effect on ~~May 14~~July 1, 2024

ADOPTED THIS ~~25~~14th DAY OF ~~JUNE~~May 14, 2024.

JEFFREY T. ODHAM, MAYOR

BRENDA E. BLANCO, CITY CLERK

NEW BERN

New Bern, NC – Electric

May 22, 2024

Dawn Lund - Vice President, Utility Financial Solutions, LLC

Chris Lund – Financial Consultant, Utility Financial Solutions, LLC

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Utility Financial Solutions, LLC

- International consulting firm providing cost of service, financial plans and rate designs to utilities across the country, Canada, Guam and the Caribbean
- Instructors for cost of service and financial planning for APPA, speakers for organizations across the country including AWWA.

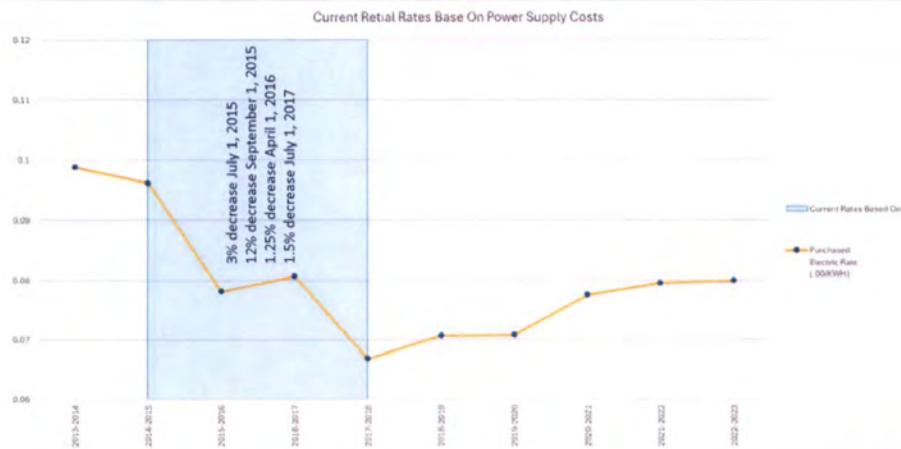
2

Rate Changes – 10 Year History

- 3% decrease July 1, 2015
- 12% decrease September 1, 2015
- 1.25% decrease April 1, 2016
- 1.5% decrease July 1, 2017

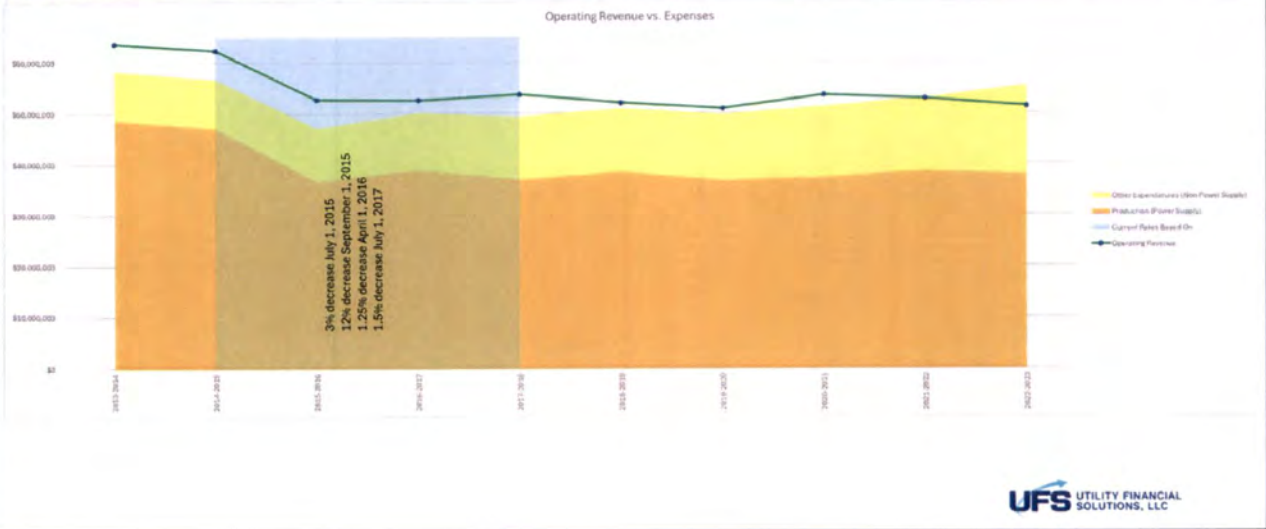
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Rate Changes & Power Supply Costs



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Operating Revenue vs. Expenses



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Expense Detail Major Accounts

	2020	2021	2022	2023	Forecast 2024	Budget 2024
53119602 Electric Admin						
61 Personnel Services	\$ 527,018	\$ 601,682	\$ 751,801	\$ 816,392	\$ 899,843	\$ 1,147,946
62 Fringe Benefits	214,966	273,487	255,290	374,502	381,989	450,582
53119608 Elec Distribution O & M						
61 Personnel Services	\$ 1,721,079	\$ 1,886,699	\$ 2,033,455	\$ 2,589,618	\$ 3,124,685	\$ 2,886,719
62 Fringe Benefits	815,332	965,118	967,027	1,234,964	1,368,356	1,278,015
53119608 Elec Distribution O & M						
74 Supplies & Materials	393,443	594,357	749,363	1,818,541	1,453,631	1,453,631
PILOT	2,644,000	2,637,550	2,572,550	2,645,443	3,104,596	3,104,596
Totals	\$ 6,315,839	\$ 6,958,892	\$ 7,329,485	\$ 9,479,459	\$ 10,333,101	\$ 10,321,489
Change from 2020 just in these accounts						\$ 4,005,650

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Cash History



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Age of System

	2018	2024
Historic Investment	\$ 80,134,478	\$ 94,490,306
Net Book Value	35,894,602	36,630,693
Remaining NBV	45%	39%

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Cash Reserve Methodology –

	Percent Allocated	Projected 2025	Projected 2026	Projected 2027	Projected 2028	Projected 2029
Operation & Maintenance less Depreciation	12.3%	\$ 6,766,039	\$ 6,448,724	\$ 6,654,574	\$ 6,864,561	\$ 7,056,094
Historic Rate Base	3%	3,842,019	4,678,952	4,775,192	4,885,742	4,984,922
Current Portion of Debt Service	100%	2,406,741	3,298,139	3,298,331	3,298,156	3,088,693
Five Year Capital Improvements - Net of bond proceeds	20%	5,555,200	5,555,200	5,555,200	5,555,200	5,555,200
Minimum Cash Reserve Levels		\$ 18,569,999	\$ 19,981,015	\$ 20,283,297	\$ 20,603,659	\$ 20,684,909
Projected Cash Reserves		\$ 12,187,249	\$ 9,239,019	\$ 1,755,870	\$ (6,708,635)	\$ (15,238,732)



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Financial Projection Summary No Increase No PCA, with Bond Issue

Fiscal Year	Projected Rate Adjustments	Projected Revenues	Projected Expenses	Adjusted Operating Income	Projected Cash Balances	Restricted Cash	Capital Improvements	Bond Issues	Grant Funds	Debt Coverage Ratio
2025	0.00%	55,534,491	59,109,449	(6,702,548)	8,396,636	2,723,934	33,577,000	16,000,000	20,000,000	(2.45)
2026	0.00%	55,624,993	57,759,148	(6,098,678)	4,591,253	2,723,934	27,897,750	27,897,750	-	(0.58)
2027	0.00%	55,718,120	60,054,837	(8,397,480)	(5,028,270)	2,723,934	3,208,000	-	-	(0.94)
2028	0.00%	55,813,948	61,899,913	(10,257,278)	(16,892,836)	2,723,934	3,685,000	-	-	(1.48)
2029	0.00%	55,912,555	63,596,914	(11,954,852)	(29,935,960)	2,723,934	3,306,000	-	-	(1.95)
Targeted Minimum in 2025				\$ 2,516,202	\$ 18,569,999					1.45
Targeted Minimum in 2029				\$ 3,436,196	\$ 20,684,909					1.45



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Financial Projection Summary With Increase no PCA, with Bond Issue

Fiscal Year	Projected Rate Adjustments	Projected Revenues	Projected Expenses	Adjusted Operating Income	Projected Cash Balances	Restricted Cash	Capital Improvements	Bond Issues	Grant Funds	Debt Coverage Ratio
2025	18.00%	64,756,312	59,109,449	2,519,273	17,618,458	2,723,934	33,577,000	16,000,000	20,000,000	5.05
2026	0.00%	64,846,815	57,759,148	3,123,143	23,127,113	2,723,934	27,897,750	27,897,750	-	3.29
2027	4.00%	67,358,108	60,054,837	3,242,507	25,332,937	2,723,934	3,208,000	-	-	2.64
2028	3.00%	69,340,106	61,899,913	3,268,879	27,247,858	2,723,934	3,685,000	-	-	2.70
2029	2.90%	71,316,709	63,596,914	3,449,302	29,881,347	2,723,934	3,306,000	-	-	2.80
Targeted Minimum in 2025				\$ 2,516,202	\$ 18,569,999					1.45
Targeted Minimum in 2029				\$ 3,436,196	\$ 20,684,909					1.45

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Financial Projection Summary With Increase with PCA, with Bond Issue

Fiscal Year	Projected Rate Adjustments	Projected Revenues	Projected Expenses	Adjusted Operating Income	Projected Cash Balances	Restricted Cash	Capital Improvements	Bond Issues	Grant Funds	Debt Coverage Ratio
2025	5.00%	61,886,721	59,109,449	(350,318)	14,748,866	2,723,934	33,577,000	16,000,000	20,000,000	2.72
2026	5.00%	61,695,556	57,759,148	(28,116)	17,077,567	2,723,934	27,897,750	27,897,750	-	1.97
2027	5.00%	65,883,514	60,054,837	1,767,914	17,748,302	2,723,934	3,208,000	-	-	2.18
2028	2.00%	68,458,104	61,899,913	2,386,877	18,705,375	2,723,934	3,685,000	-	-	2.41
2029	2.00%	70,897,137	63,596,914	3,029,730	20,833,866	2,723,934	3,306,000	-	-	2.65
Targeted Minimum in 2025				\$ 2,516,202	\$ 18,569,999					1.45
Targeted Minimum in 2029				\$ 3,436,196	\$ 20,684,909					1.45

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PCA – Wholesale Power Cost Adjustment

- Mechanism to fairly and smoothly charge customers for varying power costs
- Intended to recoup power costs that are more than what's being collected in retail rates
- Charged on a per kWh basis as an additional fee to balance power cost overages



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PCA – Basic Concepts Example

PCA Basic Concepts Example	
\$ 0.0800	PCA base - Typical Power Cost (included in rates)
\$ 0.0850	New Power Cost (future monthly power costs)
\$ 0.0050	PCA to balance old cost with new cost



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PCA – 33 month example (without and with)

.00 no pca over 33 months ended in under recovery of average of -\$45,000 per month



(without PCA)

.001649 average over 33 months to keep balanced (less than 2 tenths of one cent)



(with PCA)



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Rate Impacts – with PCA and 5% Rate Track

E01 RESIDENTIAL

	Current Rate	Customer Bill	FY 2025	Customer Bill	FY 2026	Customer Bill	FY 2027	Customer Bill
Customer Charge	\$ 9.95	\$ 9.95	\$ 12.00	\$ 12.00	\$ 14.00	\$ 14.00	\$ 16.00	\$ 16.00
First 300 kWh	\$ 0.1018	\$ 30.54	\$ 0.1060	\$ 31.80	\$ 0.1105	\$ 33.15	\$ 0.1154	\$ 34.62
All additional kWh	\$ 0.1175	\$ 79.55	\$ 0.1217	\$ 82.39	\$ 0.1262	\$ 85.44	\$ 0.1311	\$ 88.75
Three Phase Charge	\$ 13.67	\$ -	\$ 14.35	\$ -	\$ 15.05	\$ -	\$ 15.80	\$ -
Power Cost Adjustment			\$ 0.0081	\$ 7.91	\$ 0.0081	\$ 7.91	\$ 0.0081	\$ 7.91
Monthly Total		\$ 120.04		\$ 134.10		\$ 140.50		\$ 147.29
Year-to-year monthly billing difference				\$ 14.07		\$ 6.40		\$ 6.79
*Realized cost (\$/kWh)		\$ 0.12		\$ 0.14		\$ 0.14		\$ 0.15
*Customer count: 18,906.								
*Consumption based on 977 kWh.								



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Questions?



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Appendix – Additional Information



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Rate Impacts – with PCA and 5% Rate Track

E07 ENERGY EFFICIENT RESIDENTIAL

	Current Rate	Customer Bill	FY 2025	Customer Bill	FY 2026	Customer Bill	FY 2027	Customer Bill
Customer Charge	\$ 9.95	\$ 9.95	\$ 12.00	\$ 12.00	\$ 14.00	\$ 14.00	\$ 16.00	\$ 16.00
First 300 kWh	\$ 0.0968	\$ 29.04	\$ 0.1007	\$ 30.21	\$ 0.1050	\$ 31.50	\$ 0.1096	\$ 32.88
All additional kWh	\$ 0.1116	\$ 75.55	\$ 0.1156	\$ 78.26	\$ 0.1199	\$ 81.17	\$ 0.1245	\$ 84.29
Three Phase Charge	\$ 13.67	\$ -	\$ 14.35	\$ -	\$ 15.05	\$ -	\$ 15.80	\$ -
Power Cost Adjustment			\$ 0.0081	\$ 7.91	\$ 0.0081	\$ 7.91	\$ 0.0081	\$ 7.91
Monthly Total		\$ 114.54		\$ 128.38		\$ 134.59		\$ 141.08
Year-to-year monthly billing difference				\$ 13.84		\$ 6.20		\$ 6.49
*Realized cost (\$/kWh)		\$ 0.12		\$ 0.13		\$ 0.14		\$ 0.14
*Customer count: 1,921.								
*Consumption based on 977 kWh.								

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Rate Impacts – with PCA and 5% Rate Track

E40 RESIDENTIAL 100% AC CONTROL

	Current Rate	Customer Bill	FY 2025	Customer Bill	FY 2026	Customer Bill	FY 2027	Customer Bill
Customer Charge	\$ 9.95	\$ 9.95	\$ 12.00	\$ 12.00	\$ 14.00	\$ 14.00	\$ 16.00	\$ 16.00
First 300 kWh	\$ 0.1018	\$ 30.54	\$ 0.1060	\$ 31.80	\$ 0.1105	\$ 33.15	\$ 0.1154	\$ 34.62
>300 TO 800 kWh	\$ 0.1175	\$ 79.55	\$ 0.1217	\$ 82.39	\$ 0.1262	\$ 85.44	\$ 0.1311	\$ 88.75
all additional kWh	\$ 0.1013	\$ -	\$ 0.1026	\$ -	\$ 0.1044	\$ -	\$ 0.1065	\$ -
Three Phase Charge	\$ 13.67	\$ -	\$ 14.35	\$ -	\$ 15.05	\$ -	\$ 15.80	\$ -
Power Cost Adjustment			\$ 0.0081	\$ 7.91	\$ 0.0081	\$ 7.91	\$ 0.0081	\$ 7.91
Monthly Total		\$ 120.04		\$ 134.10		\$ 140.50		\$ 147.29
Year-to-year monthly billing difference				\$ 14.07		\$ 6.40		\$ 6.79
*Realized cost (\$/kWh)		\$ 0.12		\$ 0.14		\$ 0.14		\$ 0.15
*Customer count: 1.								
*Consumption based on 977 kWh.								

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Rate Impacts – with PCA and 5% Rate Track

E50 ENERGY EFFICIENT RESIDENTIAL & 100 % AC CONTROL

	Current Rate	Customer Bill	FY 2025	Customer Bill	FY 2026	Customer Bill	FY 2027	Customer Bill
Customer Charge	\$ 9.95	\$ 9.95	\$ 12.00	\$ 12.00	\$ 14.00	\$ 14.00	\$ 16.00	\$ 16.00
First 300 kWh	\$ 0.0968	\$ 29.04	\$ 0.1007	\$ 30.21	\$ 0.1050	\$ 31.50	\$ 0.1096	\$ 32.88
>300 TO 800 kWh	\$ 0.1116	\$ 75.55	\$ 0.1156	\$ 78.26	\$ 0.1199	\$ 81.17	\$ 0.1245	\$ 84.29
all additional kWh	\$ 0.0948	\$ -	\$ 0.0940	\$ -	\$ 0.0936	\$ -	\$ 0.0935	\$ -
Three Phase Charge	\$ 13.67	\$ -	\$ 14.35	\$ -	\$ 15.05	\$ -	\$ 15.80	\$ -
Power Cost Adjustment			\$ 0.0081	\$ 7.91	\$ 0.0081	\$ 7.91	\$ 0.0081	\$ 7.91
Monthly Total		\$ 114.54		\$ 128.38		\$ 134.59		\$ 141.08
Year-to-year monthly billing difference				\$ 13.84		\$ 6.20		\$ 6.49
*Realized cost (\$/kWh)		\$ 0.12		\$ 0.13		\$ 0.14		\$ 0.14
*Customer count: 7.								
*Consumption based on 977 kWh.								

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Rate Impacts – with PCA and 5% Rate Track

E03 SMALL GENERAL SERVICE

	Current Rate	Customer Bill	FY 2025	Customer Bill	FY 2026	Customer Bill	FY 2027	Customer Bill
Customer Charge	\$ 20.64	\$ 20.64	\$ 25.00	\$ 25.00	\$ 29.50	\$ 29.50	\$ 34.00	\$ 34.00
First 2325 kWh	\$ 0.1260	\$ 79.38	\$ 0.1264	\$ 79.63	\$ 0.1268	\$ 79.88	\$ 0.1275	\$ 80.33
Next 1000 kWh	\$ 0.0960	\$ -	\$ 0.1010	\$ -	\$ 0.1060	\$ -	\$ 0.1120	\$ -
All over 3325 kWh	\$ 0.0900	\$ -	\$ 0.0900	\$ -	\$ 0.0920	\$ -	\$ 0.0980	\$ -
Three Phase Charge	\$ 13.67	\$ -	\$ 14.35	\$ -	\$ 15.05	\$ -	\$ 15.80	\$ -
Power Cost Adjustment			\$ 0.0081	\$ 5.10	\$ 0.0081	\$ 5.10	\$ 0.0081	\$ 5.10
Monthly Total		\$ 100.02		\$ 109.74		\$ 114.49		\$ 119.43
Year-to-year monthly billing difference				\$ 9.72		\$ 4.75		\$ 4.94
*Realized cost (\$/kWh)		\$ 0.16		\$ 0.17		\$ 0.18		\$ 0.19
*Customer count: 2,735.								
*Consumption based on 630 kWh.								

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Rate Impacts – with PCA and 5% Rate Track

E04 SMALL GENERAL SERVICE

	Current Rate	Customer Bill	FY 2025	Customer Bill	FY 2026	Customer Bill	FY 2027	Customer Bill
Customer Charge	\$ 20.64	\$ 20.64	\$ 25.00	\$25.00	\$ 29.50	\$ 29.50	\$ 34.00	\$ 34.00
First 2325 kWh	\$ 0.1013	\$ 235.52	\$ 0.1030	\$ 239.48	\$ 0.1048	\$ 243.66	\$ 0.1069	\$ 248.54
Next 1000 kWh	\$ 0.0956	\$ 95.60	\$ 0.0973	\$ 97.30	\$ 0.0991	\$ 99.10	\$ 0.1012	\$ 101.20
All over 3325 kWh	\$ 0.0887	\$ 66.53	\$ 0.0904	\$ 67.80	\$ 0.0922	\$ 69.15	\$ 0.0943	\$ 70.73
Demand Charge	\$ 2.31	\$ 34.65	\$ 3.00	\$ 45.00	\$ 3.75	\$ 56.25	\$ 4.50	\$ 67.50
Three Phase Charge	\$ 13.67	\$ -	\$ 14.35	\$ -	\$ 15.05	\$ -	\$ 15.80	\$ -
Power Cost Adjustment			\$ 0.0081	\$ 33.01	\$ 0.0081	\$ 33.01	\$ 0.0081	\$ 33.01
Monthly Total		\$ 452.94		\$ 507.58		\$ 530.67		\$ 554.98
Year-to-year monthly billing difference				\$ 54.65		\$ 23.09		\$ 24.31
*Realized cost (\$/kWh)		\$ 0.11		\$ 0.12		\$ 0.13		\$ 0.14
*Customer count: 640.								
*Consumption based on 4075 kWh and 15 kW.								

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Rate Impacts – with PCA and 5% Rate Track

E08 MEDIUM GENERAL SERVICE

	Current Rate	Customer Bill	FY 2025	Customer Bill	FY 2026	Customer Bill	FY 2027	Customer Bill
Customer Charge	\$ 22.80	\$ 22.80	\$ 27.00	\$ 27.00	\$ 31.50	\$ 31.50	\$ 36.00	\$ 36.00
kWh	\$ 0.0842	\$ 1,060.58	\$ 0.0863	\$ 1,087.03	\$ 0.0893	\$ 1,124.82	\$ 0.0926	\$ 1,166.39
Demand	\$ 8.08	\$ 331.85	\$ 9.00	\$ 369.63	\$ 9.75	\$ 400.43	\$ 10.50	\$ 431.24
Three Phase Charge	\$ 13.67	\$ 13.67	\$ 14.35	\$ 14.35	\$ 15.05	\$ 15.05	\$ 15.80	\$ 15.80
Power Cost Adjustment			\$ 0.0081	\$ 102.03	\$ 0.0081	\$ 102.03	\$ 0.0081	\$ 102.03
Monthly Total		\$ 1,428.90		\$ 1,600.04		\$ 1,673.83		\$ 1,751.45
Year-to-year monthly billing difference				\$ 171.14		\$ 73.79		\$ 77.62
*Realized cost (\$/kWh)		\$ 0.11		\$ 0.13		\$ 0.13		\$ 0.14
*Customer count: 259.								
*Consumption based on 12,596 kWh and 41.07 kW.								

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Rate Impacts – with PCA and 5% Rate Track

E10 MEDIUM GENERAL SERVICE

	Current Rate	Customer Bill	FY 2025	Customer Bill	FY 2026	Customer Bill	FY 2027	Customer Bill
Customer Charge	\$ 22.80	\$ 22.80	\$ 27.00	\$ 27.00	\$ 31.50	\$ 31.50	\$ 36.00	\$ 36.00
kWh	\$ 0.0800	\$ 3,944.56	\$ 0.0829	\$ 4,087.55	\$ 0.0862	\$ 4,250.26	\$ 0.0898	\$ 4,427.77
Demand	\$ 8.95	\$ 971.61	\$ 9.75	\$ 1,058.46	\$ 10.50	\$ 1,139.88	\$ 11.25	\$ 1,221.30
Three Phase Charge	\$ 13.67	\$ -	\$ 14.35	\$ 14.35	\$ 15.05	\$ 15.05	\$ 15.80	\$ 15.80
Power Cost Adjustment			\$ 0.0081	\$ 399.39	\$ 0.0081	\$ 399.39	\$ 0.0081	\$ 399.39
Monthly Total		\$ 4,938.97		\$ 5,586.75		\$ 5,836.08		\$ 6,100.26
Year-to-year monthly billing difference				\$ 647.78		\$ 249.33		\$ 264.18
*Realized cost (\$/kWh)		\$ 0.10		\$ 0.11		\$ 0.12		\$ 0.12
*Customer count: 80.								
*Consumption based on 49,307 kWh and 108.56 Kw.								

 UFS UTILITY FINANCIAL SOLUTIONS, LLC

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Rate Impacts – with PCA and 5% Rate Track

E11 (TOU) MEDIUM GENERAL SERVICE

	Current Rate	Customer Bill	FY 2025	Customer Bill	FY 2026	Customer Bill	FY 2027	Customer Bill
Customer Charge	\$ 56.78	\$ 56.78	\$ 60.00	\$ 60.00	\$ 63.00	\$ 63.00	\$ 66.00	\$ 66.00
kWh	\$ 0.0601	\$ 117.62	\$ 0.0606	\$ 118.59	\$ 0.0630	\$ 123.29	\$ 0.0655	\$ 128.18
On Peak Demand	\$ 21.57	\$ 261.00	\$ 27.00	\$ 326.70	\$ 27.75	\$ 335.78	\$ 28.50	\$ 344.85
Excess Demand	\$ 5.19	\$ 257.42	\$ 6.00	\$ 297.60	\$ 6.75	\$ 334.80	\$ 7.50	\$ 372.00
Power Cost Adjustment			\$ 0.0081	\$ 15.85	\$ 0.0081	\$ 15.85	\$ 0.0081	\$ 15.85
Monthly Total		\$ 692.82		\$ 818.75		\$ 872.72		\$ 926.89
Year-to-year monthly billing difference				\$ 125.93		\$ 53.97		\$ 54.17
*Realized cost (\$/kWh)		\$ 0.35		\$ 0.42		\$ 0.45		\$ 0.47
*Customer count: 0.								
*Consumption based on 1957 kWh and 12.1 kW on peak, 49.6 kW off peak.								

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Rate Impacts – with PCA and 5% Rate Track

E12 MEDIUM GENERAL SERVICE (CP)

	Current Rate	Customer Bill	FY 2025	Customer Bill	FY 2026	Customer Bill	FY 2027	Customer Bill
Customer Charge	\$ 82.24	\$ 82.24	\$ 90.00	\$ 90.00	\$ 97.50	\$ 97.50	\$ 105.00	\$ 105.00
kWh	\$ 0.0601	\$ 4,964.38	\$ 0.0607	\$ 5,013.94	\$ 0.0630	\$ 5,203.93	\$ 0.0655	\$ 5,410.43
CP Demand	\$ 22.12	\$ 682.84	\$ 27.00	\$ 833.49	\$ 27.75	\$ 856.64	\$ 28.50	\$ 879.80
Excess Demand	\$ 5.24	\$ 770.49	\$ 6.00	\$ 882.24	\$ 6.75	\$ 992.52	\$ 7.50	\$ 1,102.80
Power Cost Adjustment			\$ 0.0081	\$ 669.08	\$ 0.0081	\$ 669.08	\$ 0.0081	\$ 669.08
Monthly Total		\$ 6,499.95		\$ 7,488.75		\$ 7,819.66		\$ 8,167.10
Year-to-year monthly billing difference				\$ 988.79		\$ 330.92		\$ 347.44
*Realized cost (\$/kWh)		\$ 0.08		\$ 0.09		\$ 0.09		\$ 0.10
*Customer count: 27.								
*Consumption based on 82,602 kWh and 30.87 CP and 147.04 excess.								

 UFS UTILITY FINANCIAL SOLUTIONS, LLC

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Rate Impacts – with PCA and 5% Rate Track

E13 LARGE GENERAL SERVICE (CP)

	Current Rate	Customer Bill	FY 2025	Customer Bill	FY 2026	Customer Bill	FY 2027	Customer Bill
Customer Charge	\$ 166.06	\$ 166.06	\$ 175.00	\$ 175.00	\$ 184.00	\$ 184.00	\$ 193.00	\$ 193.00
kWh	\$ 0.0561	\$ 26,942.59	\$ 0.0568	\$ 27,278.77	\$ 0.0590	\$ 28,335.34	\$ 0.0614	\$ 29,487.96
CP Demand	\$ 26.84	\$ 3,535.63	\$ 27.00	\$ 3,556.71	\$ 27.75	\$ 3,655.51	\$ 28.50	\$ 3,754.31
Excess Demand	\$ 4.43	\$ 3,662.41	\$ 6.00	\$ 4,960.38	\$ 6.75	\$ 5,580.43	\$ 7.50	\$ 6,200.48
Power Cost Adjustment			\$ 0.0081	\$ 3,890.11	\$ 0.0081	\$ 3,890.11	\$ 0.0081	\$ 3,890.11
Monthly Total		\$ 34,306.69		\$ 39,860.96		\$ 41,645.38		\$ 43,525.85
Year-to-year monthly billing difference				\$ 5,554.27		\$ 1,784.42		\$ 1,880.47
*Realized cost (\$/kWh)		\$ 0.07		\$ 0.08		\$ 0.09		\$ 0.09
*Customer count: 3.								
*Consumption based on 480,260 kWh and 131.73 CP and 826.73 excess.								

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Rate Impacts – with PCA and 5% Rate Track

E06 LARGE GENERAL SERVICE (CP)

	Current Rate	Customer Bill	FY 2025	Customer Bill	FY 2026	Customer Bill	FY 2027	Customer Bill
Customer Charge	\$ 1,214.06	\$ 1,214.06	\$ 1,250.00	\$ 1,250.00	\$ 1,285.00	\$ 1,285.00	\$ 1,320.00	\$ 1,320.00
First 1,700,000 kWh	\$ 0.0529	\$ 88,792.65	\$ 0.0529	\$ 88,792.65	\$ 0.0543	\$ 91,142.55	\$ 0.0564	\$ 94,667.40
All additional kWh	\$ 0.0445	\$ -	\$ 0.0445	\$ -	\$ 0.0543	\$ -	\$ 0.0564	\$ -
CP Demand First 3,200 kW	\$ 26.84	\$ 3,140.28	\$ 27.00	\$ 3,159.00	\$ 27.75	\$ 3,246.75	\$ 28.50	\$ 3,334.50
CP Demand Additional kW	\$ 14.94	\$ -	\$ 27.00	\$ -	\$ 27.75	\$ -	\$ 28.50	\$ -
Excess Demand Charge	\$ 4.19	\$ 12,498.77	\$ 6.00	\$ 17,898.00	\$ 6.75	\$ 20,135.25	\$ 7.50	\$ 22,372.50
Power Cost Adjustment			\$ 0.0081	\$ 13,595.85	\$ 0.0081	\$ 13,595.85	\$ 0.0081	\$ 13,595.85
Monthly Total		\$ 104,431.70		\$ 123,445.50		\$ 128,120.40		\$ 133,970.25
Year-to-year monthly billing difference				\$ 19,013.80		\$ 4,674.90		\$ 5,849.85
*Realized cost (\$/kWh)		\$ 0.06		\$ 0.07		\$ 0.08		\$ 0.08
*Customer count: 1.								
*Consumption based on 1,678,500 kWh and 117 CP and 2983 excess.								

UFS UTILITY FINANCIAL SOLUTIONS, LLC

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Rate Impacts – with PCA and 5% Rate Track

EDR5 ECONOMIC DEVELOPMENT LGS (CP)

	Current Rate	Customer Bill	FY 2025	Customer Bill	FY 2026	Customer Bill	FY 2027	Customer Bill
Customer Charge	\$ 197.00	\$ 197.00	\$ 205.00	\$ 205.00	\$ 215.00	\$ 215.00	\$ 225.00	\$ 225.00
kWh	\$ 0.0444	\$ 21,323.54	\$ 0.0445	\$ 21,371.57	\$ 0.0480	\$ 23,052.48	\$ 0.0520	\$ 24,973.52
CP Demand	\$ 26.84	\$ 3,535.63	\$ 27.00	\$ 3,556.71	\$ 27.75	\$ 3,655.51	\$ 28.50	\$ 3,754.31
Excess Demand	\$ 3.94	\$ 3,257.32	\$ 6.00	\$ 4,960.38	\$ 6.75	\$ 5,580.43	\$ 7.50	\$ 6,200.48
Power Cost Adjustment			\$ 0.0081	\$ 3,890.11	\$ 0.0081	\$ 3,890.11	\$ 0.0081	\$ 3,890.11
Monthly Total		\$ 28,313.49		\$ 33,983.77		\$ 36,393.52		\$ 39,043.41
Year-to-year monthly billing difference				\$ 5,670.27		\$ 2,409.76		\$ 2,649.89
*Realized cost (\$/kWh)		\$ 0.06		\$ 0.07		\$ 0.08		\$ 0.08
*Customer count: 0.								
*Consumption based on 480,260 kWh and 131.73 CP and 826.73 excess.								

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Rate Impacts – with PCA and 5% Rate Track

E09 SMALL WHOLESALE

	Current Rate	Customer Bill	FY 2025	Customer Bill	FY 2026	Customer Bill	FY 2027	Customer Bill
Customer Charge	\$ 21.78	\$ 21.78	\$ 27.00	\$ 27.00	\$ 33.00	\$ 33.00	\$ 39.00	\$ 39.00
kWh	\$ 0.0859	\$ 97.07	\$ 0.0870	\$ 98.31	\$ 0.0856	\$ 96.73	\$ 0.0846	\$ 95.60
Demand	\$ 6.69	\$ 41.75	\$ 7.00	\$ 43.68	\$ 7.75	\$ 48.36	\$ 8.50	\$ 53.04
Power Cost Adjustment			\$ 0.0081	\$ 9.15	\$ 0.0081	\$ 9.15	\$ 0.0081	\$ 9.15
Monthly Total		\$ 160.59		\$ 178.14		\$ 187.24		\$ 196.79
Year-to-year monthly billing difference				\$ 17.55		\$ 9.10		\$ 9.55
*Realized cost (\$/kWh)		\$ 0.14		\$ 0.16		\$ 0.17		\$ 0.17
*Customer count: 27.								
*Consumption based on 1,130 kWh and 6.24 kW.								

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Rate Impacts – with PCA and 5% Rate Track

LPDS LOAD PROFILE DATA SERVICE

	Current Rate	Customer Bill	FY 2025	Customer Bill	FY 2026	Customer Bill	FY 2027	Customer Bill
Setup Fee	\$ 150.00	\$ -	\$ 157.50	\$ -	\$ 165.40	\$ -	\$ 173.65	\$ -
Day After Service Fee	\$ 40.50	\$ 40.50	\$ 42.50	\$ 42.50	\$ 44.65	\$ 44.65	\$ 46.90	\$ 46.90
Same Day Service Fee	\$ 90.00	\$ -	\$ 94.50	\$ -	\$ 99.25	\$ -	\$ 104.20	\$ -
Monthly Total		\$ 40.50		\$ 42.50		\$ 44.65		\$ 46.90
Year-to-year monthly billing difference				\$ 2.00		\$ 2.15		\$ 2.25
*Customer count: 4.								

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Rate Impacts – with PCA and 5% Rate Track

E14 COMMERCIAL EV CHARGING

	Current Rate	Customer Bill	FY 2025	Customer Bill	FY 2026	Customer Bill	FY 2027	Customer Bill
Customer Charge	\$ 166.06	\$ 166.06	\$ 175.00	\$175.00	\$ 184.00	\$ 184.00	\$ 193.00	\$ 193.00
Load Factor less than or equal to 10%	\$ 0.1010	\$ 1,860.12	\$ 0.1018	\$ 1,874.85	\$ 0.1040	\$ 1,915.37	\$ 0.1064	\$ 1,959.57
Load Factor > 10% and <= 20%	\$ 0.0786	\$ -	\$ 0.0793	\$ -	\$ 0.0815	\$ -	\$ 0.0839	\$ -
Load Factor greater than 20%	\$ 0.0561	\$ -	\$ 0.0568	\$ -	\$ 0.0590	\$ -	\$ 0.0614	\$ -
CP Demand	\$ 26.84	\$ 1,637.24	\$ 27.00	\$ 1,647.00	\$ 27.75	\$ 1,692.75	\$ 28.50	\$ 1,738.50
Excess Demand	\$ 4.43	\$ 1,444.18	\$ 6.00	\$ 1,956.00	\$ 6.75	\$ 2,200.50	\$ 7.50	\$ 2,445.00
Power Cost Adjustment			\$ 0.0081	\$ 149.18	\$ 0.0081	\$ 149.18	\$ 0.0081	\$ 149.18
Monthly Total		\$ 4,941.54		\$ 5,627.03		\$ 5,957.80		\$ 6,292.25
Year-to-year monthly billing difference				\$ 685.49		\$ 330.77		\$ 334.45
*Realized cost (\$/kWh)		\$ 0.68		\$ 0.77		\$ 0.82		\$ 0.86
*Customer count: 4.								
*Consumption based on 18,417 kWh, 61 CP, and 326 excess.								

UFS UTILITY FINANCIAL SOLUTIONS, LLC

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Rate Impacts – with PCA and 5% Rate Track

E15 UTILITY OWNED EV CHARGING

	Current Rate	Customer Bill	FY 2025	Customer Bill	FY 2026	Customer Bill	FY 2027	Customer Bill
Load Factor less than or equal to 10%	\$ 0.68	\$ 24.70	\$ 0.71	\$ 25.79	\$ 0.75	\$ 27.25	\$ 0.79	\$ 28.70
Load Factor > 10% and <= 20%	\$ 0.47	\$ -	\$ 0.49	\$ -	\$ 0.51	\$ -	\$ 0.54	\$ -
Load Factor greater than 20%	\$ 0.38	\$ -	\$ 0.40	\$ -	\$ 0.42	\$ -	\$ 0.44	\$ -
Inactive Charging	\$ 0.17	\$ -	\$ 0.18	\$ -	\$ 0.19	\$ -	\$ 0.20	\$ -
Power Cost Adjustment			\$ 0.0081	\$ 0.29	\$ 0.0081	\$ 0.29	\$ 0.0081	\$ 0.29
Monthly Total		\$ 24.70		\$ 26.09		\$ 27.54		\$ 28.99
Year-to-year monthly billing difference				\$ 1.38		\$ 1.45		\$ 1.45
*Realized cost (\$/kWh)		\$ 0.68		\$ 0.72		\$ 0.76		\$ 0.80
*Customer count: varies.								
*Consumption based on 36.33 kWh.								

UFS UTILITY FINANCIAL SOLUTIONS, LLC

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Financial Projection Summary No Increase with PCA, with Bond Issue

Fiscal Year	Projected Rate Adjustments	Projected Revenues	Projected Expenses	Adjusted Operating Income	Projected Cash Balances	Restricted Cash	Capital Improvements	Bond Issues	Grant Funds	Debt Coverage Ratio
2025	0.00%	\$ 59,325,104	\$ 59,909,449	\$ (3,711,935)	\$ 10,579,249	\$ 2,723,934	\$ 33,577,000	\$ 16,000,000	\$ 20,000,000	(0.03)
2026	0.00%	56,444,241	58,582,348	(6,102,631)	6,791,739	2,723,934	27,897,750	27,897,750		(0.57)
2027	0.00%	57,808,016	60,901,910	(7,154,657)	(1,562,955)	2,723,934	3,208,000	-		(0.56)
2028	0.00%	59,196,449	62,771,551	(7,746,415)	(10,916,658)	2,723,934	3,685,000	-		(0.72)
2029	0.00%	60,425,602	64,493,829	(8,338,720)	(20,343,669)	2,723,934	3,306,000	-		(0.86)
Targeted Minimum in 2025				\$ 2,516,202	\$ 18,668,399					1.45
Targeted Minimum in 2029				\$ 3,436,196	\$ 19,133,589					1.45



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CIP – 5 Year Capital Improvement Plan

Department	Org/Division	Objct	FYE25	FYE26	FYE27	FYE28	FYE29	Total	Grant Ask	Description
Electric	9602 Electric Admin	75210 Motor Vehicles	\$ 60,000					\$ 60,000	\$ -	Replace 2020 N-4 Hybrid
Electric	9602 Electric Admin	75210 Motor Vehicles	\$ 60,000	\$ 60,000	\$ 60,000	\$ 60,000	\$ 60,000	\$ 240,000	\$ -	Fleet Attrition
Electric	9602 Electric Admin	75210 Motor Vehicles				\$ 60,000		\$ 60,000	\$ -	Fleet Attrition
Electric	9608 Distribution O&M	75190 Other Equipment				\$ 50,000		\$ 50,000	\$ -	Replace Cable/Fault Locator
Electric	9608 Distribution O&M	75190 Other Equipment	\$ 35,000	\$ 35,000	\$ 35,000			\$ 105,000	\$ -	Replace Skid Steer Attachment
Electric	9608 Distribution O&M	75190 Other Equipment				\$ 75,000		\$ 75,000	\$ -	Replace Chipper
Electric	9608 Distribution O&M	75190 Other Equipment			\$ 35,000			\$ 35,000	\$ -	Replace White seal trailer
Electric	9608 Distribution O&M	75190 Other Equipment	\$ 110,000			\$ 110,000		\$ 220,000	\$ -	Replace Back Hoe
Electric	9608 Distribution O&M	75190 Other Equipment				\$ 60,000		\$ 60,000	\$ -	Replace Flat bed equipment trailer
Electric	9608 Distribution O&M	75190 Other Equipment	\$ 12,000					\$ 12,000	\$ -	Traffic control sign board
Electric	9609 Distribution O&M	75190 Other Equipment	\$ 35,000					\$ 35,000	\$ -	2 Portable light towers
Electric	9609 Distribution O&M	75190 Other Equipment			\$ 18,000			\$ 18,000	\$ -	Replace Cable Pulley
Electric	9607 Distribution O&M	75210 Motor Vehicles	\$ 400,000					\$ 400,000	\$ -	Replace 2025 Line Truck / Digger Derrick U-75
Electric	9608 Distribution O&M	75210 Motor Vehicles	\$ 400,000	\$ 400,000	\$ 400,000	\$ 400,000	\$ 400,000	\$ 1,600,000	\$ -	Replace Line Truck
Electric	9608 Distribution O&M	75210 Motor Vehicles	\$ 90,000	\$ 80,000	\$ 80,000	\$ 80,000	\$ 80,000	\$ 330,000	\$ -	Replace Service Truck 1989 U-75
Electric	9608 Distribution O&M	75210 Motor Vehicles			\$ 220,000	\$ 220,000		\$ 440,000	\$ -	Replace Trencher
Electric	9608 Distribution O&M	75210 Motor Vehicles	\$ 80,000	\$ 80,000	\$ 80,000	\$ 80,000		\$ 320,000	\$ -	Replace Dump Truck
Electric	9608 Distribution O&M	75410 Bldgs. & Improvements	\$ 250,000	\$ 250,000	\$ 250,000	\$ 250,000	\$ 250,000	\$ 1,000,000	\$ -	Greenliner
Electric	9609 Distribution O&M	75410 Bldgs. & Improvements	\$ 2,000,000					\$ 2,000,000	\$ -	212 Kate Rd Expansion
Electric	9608 Distribution O&M	75410 Bldgs. & Improvements		\$ 2,000,000	\$ 2,000,000	\$ 2,000,000		\$ 6,000,000	\$ -	System Improvement T&O
Electric	9608 Distribution O&M	75410 Bldgs. & Improvements	\$ 400,000					\$ 400,000	\$ -	Old Town River Crossing
Electric	9630 Power Supply	75190 Other Equipment	\$ 35,000	\$ 35,000	\$ 35,000	\$ 35,000	\$ 35,000	\$ 140,000	\$ -	Substation Battery Banks
Electric	9630 Power Supply	75190 Other Equipment	\$ 60,000	\$ 60,000	\$ 60,000			\$ 180,000	\$ -	Substation security systems
Electric	9630 Power Supply	75190 Other Equipment	\$ 30,000,000					\$ 30,000,000	\$ 20,000,000	Electric System Capacity Project (split 9632/9637)
Electric	9630 Power Supply	75190 Other Equipment	\$ 20,000,000					\$ 20,000,000	\$ -	Generation fleet attrition
Electric	9630 Power Supply	75190 Other Equipment	\$ 6,000,000					\$ 6,000,000	\$ -	Glenburnie transformer 3 of 3
Electric	9630 Power Supply	75210 Motor Vehicles	\$ 60,000			\$ 60,000		\$ 120,000	\$ -	Vehicle Purchase
Electric	9632 Communications Control	75190 Other Equipment						\$ -	\$ -	DataVoice OMS Add on
Electric	9632 Communications Control	75190 Other Equipment	\$ 204,500					\$ 204,500	\$ -	SCADA Monitor and control
Electric	9632 Communications Control	75190 Other Equipment	\$ 70,000					\$ 70,000	\$ -	Workforce Management
Electric	9632 Communications Control	75190 Other Equipment	\$ 20,000					\$ 20,000	\$ -	DataVoice OMS Add on
Electric	9632 Communications Control	75190 Other Equipment	\$ 10,250					\$ 10,250	\$ -	Dauphin RMS
Electric	9632 Communications Control	75190 Other Equipment	\$ 22,000					\$ 22,000	\$ -	DataVoice OMS Add on
Electric	9632 Communications Control	75190 Other Equipment	\$ 6,000			\$ 6,000		\$ 6,000	\$ -	UPS Batteries
Electric	9632 Communications Control	75210 Motor Vehicles	\$ 60,000	\$ 60,000	\$ 60,000	\$ 60,000	\$ 60,000	\$ 240,000	\$ -	Replace 2013 Ford Explorer F-2
Electric	9634 Utility Business Office	75190 Other Equipment	\$ 100,000					\$ 100,000	\$ -	AMR Hosted Server
Electric	9634 Utility Business Office	75190 Other Equipment	\$ 30,000					\$ 30,000	\$ -	Meter Test set
Electric	9634 Utility Business Office	75210 Motor Vehicles	\$ 65,000	\$ 65,000	\$ 65,000	\$ 65,000	\$ 65,000	\$ 260,000	\$ -	LED Vehicle
Electric	9638 Customer Payment Services	75210 Motor Vehicles				\$ 60,000		\$ 60,000	\$ -	
Electric Total			\$ 13,177,000	\$ 27,897,750	\$ 3,708,000	\$ 3,085,000	\$ 3,305,000	\$ 41,207,750	\$ 10,000,000	



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NEW BERN

NORTH CAROLINA

Everything comes together downtown

City of New Bern, NC

Electric Financial Projection Study

May 15, 2024



Submitted Respectfully by:

Dawn Lund, Vice President
Utility Financial Solutions, LLC
dlund@ufsweb.com
(231) 218-9664



May 15, 2024

Mr. Charles Bauschard
Director of Public Utilities
210 Kale Road
PO Box 1129
New Bern, NC 28563

Dear Mr. Bauschard,

We are pleased to present this executive summary report for a financial projection in the Electric Department completed for the City of New Bern. This report was prepared to provide the utility with a comprehensive examination of its existing financials by an outside party.

The specific purposes of this long-term financial projection study are:

- 1) Determine electric utility's revenue requirements for fiscal year 2025,
- 2) Projected rate adjustments needed to work toward targeted revenue requirements.
- 3) Develop electric rates for FY2025 – FY2027 (supplied via separate report "New Bern NC Electric FY2025 - FY2027 Rate Design as of 05-15-2024 - (3 year rate design) - Final.pdf")
- 4) Develop PCA – Power Cost Adjustment mechanism (supplied via separate file "UFS New Bern NC PCA Spreadsheet.xlsx")

This report includes results of the financial projections and identifies projected future rate adjustments of the Electric Department. Specific findings included in this report are:

- 1) Projected rate tracks are based on the utilities ability to meet three factors listed below:
 - a. Debt Coverage Ratio,
 - b. Minimum Cash Reserves,
 - c. Optimal Net Income.

This report is intended for information and use by management and the Board of Directors for purposes stated above and is not intended to be used by anyone except the specified parties.

Sincerely,

Dawn Lund

Utility Financial Solutions, LLC
Dawn Lund
Vice-President

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INTRODUCTION

This report was prepared to provide the City of New Bern with a long-term financial projection and rate track. The specific purposes of the financial plan are identified below:

- 1) ***Determine electric utility's revenue requirements for fiscal year 2025.*** The Electric Utility's revenue requirements were projected for the period from 2025 – 2029 and included adjustments for the following:
 - a. Operating costs and inflation
 - b. Anticipated power costs,
 - c. Capital improvements currently underway and scheduled over next five years. The Utility provided capital improvement information.

- 2) ***Projected rate adjustments needed to meet targeted revenue requirements.*** The primary purpose of this study is to identify appropriate revenue requirements and the rate adjustments needed to work toward requirements. The report includes a long-term rate track for the City of New Bern to help ensure the financial stability of the utility in future years. The rate track was designed after discussions with management to work towards targets, while keeping rate adjustments to a certain threshold to minimized rate impact to customers.

The City of New Bern retained Utility Financial Solutions, LLC to review the above items and report on findings on the appropriate course of action. This report includes results of the long-term financial projection.

Utility Revenue Requirements

Revenue requirements for the City of New Bern were projected for 2025 based on 2023 actual, and 2024 Budget expenses. Revenues and expenses were analyzed with adjustments made to actual expenses to reflect projected operating characteristics.

Table One is the projected financial summary for the Electric Department from 2025-2029 without rate adjustments and PCA but with bond issues. This financial projection includes a proposed \$16.0 million bond issue in 2025, a \$27.9 million bond issue in 2026, and a \$20.0 million grant in 2025 for capital improvements. Projections indicate an operating loss of (\$6.7) million in 2025 and losses increase to (\$11.9) million in 2029. Operating Income, cash balances and debt coverage ratios do not meet targeted minimums throughout the period.

Table One – Projected Financial Summary – (Without Rate Adjustments; Without PCA; With Bond Issues)

Fiscal Year	Projected Rate Adjustments	Projected Revenues	Projected Expenses	Adjusted Operating Income	Projected Cash Balances	Restricted Cash	Capital Improvements	Bond Issues	Grant Funds	Debt Coverage Ratio
2025	0.00%	55,534,491	59,109,449	(6,702,548)	8,396,636	2,723,934	33,577,000	16,000,000	20,000,000	(2.45)
2026	0.00%	55,624,993	57,759,148	(6,098,678)	4,591,253	2,723,934	27,897,750	27,897,750	-	(0.58)
2027	0.00%	55,718,120	60,054,837	(8,397,480)	(5,028,270)	2,723,934	3,208,000	-	-	(0.94)
2028	0.00%	55,813,948	61,899,913	(10,257,278)	(16,892,836)	2,723,934	3,685,000	-	-	(1.48)
2029	0.00%	55,912,555	63,596,914	(11,954,852)	(29,935,980)	2,723,934	3,306,000	-	-	(1.95)
Targeted Minimum in 2025				\$ 2,516,202	\$ 18,569,999					1.45
Targeted Minimum in 2029				\$ 3,436,196	\$ 20,684,909					1.45

Table Two – Projected Financial Summary – (Without Rate Adjustments; With PCA; With Bond Issues)

Fiscal Year	Projected Rate Adjustments	Projected Revenues	Projected Expenses	Adjusted Operating Income	Projected Cash Balances	Restricted Cash	Capital Improvements	Bond Issues	Grant Funds	Debt Coverage Ratio
2025	0.00%	59,325,104	59,109,449	(2,911,935)	12,187,249	2,723,934	33,577,000	16,000,000	20,000,000	0.63
2026	0.00%	56,444,241	57,759,148	(5,279,431)	9,239,019	2,723,934	27,897,750	27,897,750	-	(0.22)
2027	0.00%	57,808,016	60,054,837	(6,307,584)	1,755,870	2,723,934	3,208,000	-	-	(0.30)
2028	0.00%	59,196,449	61,899,913	(6,874,777)	(6,708,635)	2,723,934	3,685,000	-	-	(0.45)
2029	0.00%	60,425,602	63,596,914	(7,441,805)	(15,238,732)	2,723,934	3,306,000	-	-	(0.58)
Targeted Minimum in 2025				\$ 2,516,202	\$ 18,569,999					1.45
Targeted Minimum in 2029				\$ 3,436,196	\$ 20,684,909					1.45

1. The five-year capital improvement plan was provided by the Utility.
2. Financial projections should be updated during the budgeting process each year as expenses and capital expenditures change from projections.

DEVELOPMENT OF FINANCIAL TARGETS

When evaluating rates to charge customers, three key factors must be considered:

1. Debt Coverage Ratio
2. Minimum Cash Reserves
3. Optimal Net Income

Each of these factors is discussed below:

1. **Debt Coverage Ratio** – The minimum targeted debt coverage ratio for prudent financial planning purposes is 1.45 for the outstanding revenue bonds on the Electric Department. Maintaining a debt coverage ratio of 1.45 is good business practice and helps to achieve the following:
 - a. Helps to ensure adequate funds are available to meet debt service payments in years when sales are low due to cold summers or loss of a major customer(s).
 - b. Obtain higher bond rating, if revenue bonds are sold in the future, to lower interest cost.

Table Two below indicates projected debt coverage ratios from 2025-2029. Two projected bond issues of \$16.0 million in 2025 and \$27.9 million in 2026 are included in the projection.

Table Three – Debt Coverage Ratio – (Without Rate Adjustments; with PCA and Bond Issues)

Debt Coverage Ratio	Projected 2025	Projected 2026	Projected 2027	Projected 2028	Projected 2029
Add Net Income	\$ (3,669,181)	\$ (6,959,951)	\$ (8,469,978)	\$ (9,049,402)	\$ (9,567,769)
Add Depreciation Expense	4,101,003	5,330,498	5,952,613	6,090,473	6,230,293
Add Interest Expense	344,983	1,087,965	1,540,355	1,477,756	1,411,536
Cash Available for Debt Service	\$ 776,804	\$ (541,489)	\$ (977,010)	\$ (1,481,174)	\$ (1,925,940)
Debt Principal and Interest	1,229,091	2,406,741	3,298,139	3,298,331	3,298,156
Projected Debt Coverage Ratio (Covenants)	0.63	(0.22)	(0.30)	(0.45)	(0.58)
Minimum Debt Coverage Ratio	1.45	1.45	1.45	1.45	1.45

2. Minimum Cash Reserve Target - To help ensure timely completion of capital improvements and enable the utility to meet requirements for large unexpected expenditures, a minimum cash reserve policy should be established with the methodology below. The utility currently has a 90 day minimum reserve policy. Minimum cash reserves attempt to quantify the minimum amount of cash the utility should keep in reserve, actual cash reserves may vary substantially above the minimum and is dependent on the life cycle of assets that are currently in service. The methodology used in this report is based on certain assumptions related to percent of operation and maintenance, rate base, capital improvements, and debt service. The establishment of minimum cash reserves should consider a number of factors including:

- **Working Capital Lag** - Timing differences between when expenses are incurred, and revenues received from customers. Establishing a minimum cash reserve helps to ensure cash exists to pay expenses in a timely manner.
- **Investment in assets** – Catastrophic events may occur that require substantial amounts of cash reserves to replace damaged assets. Some examples of catastrophic events include ice storms, earthquakes, wind storms, floods, or tornadoes. Many of these catastrophic events may allow the utility to recover the cost of damages from FEMA; however, FEMA reimbursements can take between 6 months to 2 years to recover. The utility should ensure adequate cash reserves exist to replace the assets in a timely fashion. The minimum reserve levels are often combined with emergency funding from banks or bonding agencies.
- **Annual debt service** – Debt service payments do not occur evenly throughout the year and often occurs at periodic times typically every six months. The utility has to ensure adequate cash reserves exist to fund the debt service payment when the payment is due.
- **Capital improvement program** – Some capital improvements are funded through bond issuances and some through cash reserves. The establishment of a minimum cash reserve level helps to ensure timely replacement or construction of assets.

The minimum cash reserves calculation for the Electric Department is approximately \$19 million. The projected cash reserve falls below targets throughout the projected years. Table Three provides the minimum cash reserve calculation.

Table Four – Minimum Cash Reserves – 2025–2029 (Without Rate Adjustments; With PCA and Bond Issues)

	Percent Allocated	Projected 2025	Projected 2026	Projected 2027	Projected 2028	Projected 2029
Operation & Maintenance less Depreciation	12.3%	\$ 6,766,039	\$ 6,448,724	\$ 6,654,574	\$ 6,864,561	\$ 7,056,094
Historic Rate Base	3%	3,842,019	4,678,952	4,775,192	4,885,742	4,984,922
Current Portion of Debt Service	100%	2,406,741	3,298,139	3,298,331	3,298,156	3,088,693
Five Year Capital Improvements - Net of bond proceeds	20%	5,555,200	5,555,200	5,555,200	5,555,200	5,555,200
Minimum Cash Reserve Levels		\$ 18,569,999	\$ 19,981,015	\$ 20,283,297	\$ 20,603,659	\$ 20,684,909
Projected Cash Reserves		\$ 12,187,249	\$ 9,239,019	\$ 1,755,870	\$ (6,708,635)	\$ (15,238,732)

Cash reserves are below the minimum targets throughout the projection period.

Notes:

1. Operation and maintenance expenses exclude purchased power costs and exclude depreciation expense.
2. Rate base is historical investment in plant and equipment.
3. Average five-year capital is budgeted capital improvements for next five years and excludes capital improvements funded through debt issuances.

3. **Optimal operating income targets** - The optimal target for setting rates is the establishment of a target operating income to help ensure the following:
1. Funding of Interest Expense on the outstanding principal on debt. Interest expense is below the operating income line and needs to be recouped through the operating income balance.
 2. Funding of the inflationary increase on the assets invested in the system. The inflation on the replacement of assets invested in the utility should be recouped through the Operating Income
 3. Adequate rate of return on investment to help ensure current customers are paying their fair share of the use of the infrastructure and not deferring the charge to future generations.

As improvements are made to the system, the optimal operating income target will increase unless annual depreciation expense is greater than yearly capital improvements. The target established for the projection period is approximately \$3.1 million. The rate of return falls below the targeted minimum throughout the projected period.

Table Five - Optimal Operating Income Targets Compared to Projected (Without Rate Adjustments; With PCA and Bond Issues)

	Percent Allocated	Projected 2025	Projected 2026	Projected 2027	Projected 2028	Projected 2029
Outstanding Principal on Debt	2.0%	344,983	1,087,965	1,540,355	1,477,756	1,477,756
Contributed Capital Estimated	2.4%	521,180	504,225	487,270	470,315	453,360
System Equity	6.2%	1,650,039	1,309,921	1,363,519	1,443,534	1,505,081
Target Operating Income		\$ 2,516,202	\$ 2,902,111	\$ 3,391,144	\$ 3,391,605	\$ 3,436,196
Projected Operating Income		\$ (2,911,935)	\$ (5,279,431)	\$ (6,307,584)	\$ (6,874,777)	\$ (7,441,805)
Rate of Return in %		3.8%	3.3%	4.0%	4.1%	4.3%

The projected operating income is below optimal targeted operating income throughout the projection period.

SUMMARY OF FINANCIAL POSITION

PROPOSED RATE TRACK

Table Five below is the five-year financial projection with proposed rate increases of 5.0% in 2025-2027 and 2.0% in 2028-2029. This financial projection includes a proposed \$16.0 million bond issue in 2025, a \$27.9 million bond issue in 2026, and a \$20.0 million grant in 2025 for capital improvements. The rate track should be reviewed with the budget process as changes in expenses and capital can impact the rate track and bonding requirements.

Table Six – Projected Financial Summary (With Rate Adjustments; With Bond Issues)

Fiscal Year	Projected Rate Adjustments	Projected Revenues	Projected Expenses	Adjusted Operating Income	Projected Cash Balances	Restricted Cash	Capital Improvements	Bond Issues	Grant Funds	Debt Coverage Ratio
2025	5.00%	61,886,721	59,109,449	(350,318)	14,748,866	2,723,934	33,577,000	16,000,000	20,000,000	2.72
2026	5.00%	61,695,556	57,759,148	(28,116)	17,077,567	2,723,934	27,897,750	27,897,750		1.97
2027	5.00%	65,883,514	60,054,837	1,767,914	17,748,302	2,723,934	3,208,000	-		2.18
2028	2.00%	68,458,104	61,899,913	2,386,877	18,705,375	2,723,934	3,685,000	-		2.41
2029	2.00%	70,897,137	63,596,914	3,029,730	20,833,866	2,723,934	3,306,000	-		2.65
Targeted Minimum in 2025				\$ 2,516,202	\$ 18,569,999					1.45
Targeted Minimum in 2029				\$ 3,436,196	\$ 20,684,909					1.45

Power Cost Adjustment (PCA) Implementation

A PCA should be implemented as part of the financial strategy. Power cost adjustments (PCA) are used by many municipal electric utilities to help ensure power costs are recovered from customers in a timely fashion and the electric utility remains financially stable. A PCA reduces the utility’s risk and exposure to changes in power supply costs or changes in transmission charges and helps ensure retail customers are not over or undercharged for electricity in any given year. A PCA methodology will be provided to the utility as a requested service.

Significant Assumptions

This section outlines the significant assumptions for the City of New Bern electric study.

Forecasted Operating Expenses

Forecasted expenses were based on 2023 adjusted for power supply costs and inflation. Inflation for the period is expected to be 2.9% in 2025-2029.

Power Supply

Power supply costs were provided by the Utility.

Sales Forecast

Growth rates were projected to be 0.0%.

Revenue Forecast

The revenue forecast was based on 2023 usages adjusted for growth and rate change assumptions.

Capital Improvement Program

The capital improvement program was provided by the Utility and is listed below.

Year	Projected Capital Improvement
2025	33,577,000
2026	27,897,750
2027	3,208,000
2028	3,685,000
2029	3,306,000

Electric Department Findings

1. To maintain the long-term financial health of the Utility rate increases should be considered. The financial projection includes projected rate adjustments include 5.0% in 2025-2027 and 2.0% in 2028-2029. The financial projection includes a proposed \$16.0 million bond in 2025, a \$27.9 million bond in 2026, and a \$20.0 million grant in 2025. The rate track should be reviewed closely as part of the annual budget process as costs, revenues and capital may vary from projections and effect the rate track and bonding requirements. To ensure the utility meets financial targets and remains financially healthy, the following rate track should be considered.

Fiscal Year	Projected Rate Adjustments	Projected Revenues	Projected Expenses	Adjusted Operating Income	Projected Cash Balances	Restricted Cash	Capital Improvements	Bond Issues	Grant Funds	Debt Coverage Ratio
2025	5.00%	61,886,721	59,109,449	(350,318)	14,748,866	2,723,934	33,577,000	16,000,000	20,000,000	2.72
2026	5.00%	61,695,556	57,759,148	(28,116)	17,077,567	2,723,934	27,897,750	27,897,750	-	1.97
2027	5.00%	65,883,514	60,054,837	1,767,914	17,748,302	2,723,934	3,208,000	-	-	2.18
2028	2.00%	68,458,104	61,899,913	2,386,877	18,705,375	2,723,934	3,685,000	-	-	2.41
2029	2.00%	70,897,137	63,596,914	3,029,730	20,833,866	2,723,934	3,306,000	-	-	2.65
Targeted Minimum in 2025				\$ 2,516,202	\$ 18,569,999					1.45
Targeted Minimum in 2029				\$ 3,436,196	\$ 20,684,909					1.45

2. The financial projection revenue, expenses and cash flow should be updated annually with the budget process to determine if the rate track is on target. The rate track was set at a minimum and any changes in capital or expenses can affect the future rate track.
3. A Cash Reserve Policy should be considered based on the formula identified below to establish a minimum reserve target. The utility currently has an adopted 90-day policy. Cash should be above the minimum; and will usually increase or decrease with capital spending. The study showed a bond will be needed in 2025 to help fund the capital improvement program.

	Percent Allocated	Projected 2025	Projected 2026	Projected 2027	Projected 2028	Projected 2029
Operation & Maintenance less Depreciation	12.3%	\$ 6,766,039	\$ 6,448,724	\$ 6,654,574	\$ 6,864,561	\$ 7,056,094
Historic Rate Base	3%	3,842,019	4,678,952	4,775,192	4,885,742	4,984,922
Current Portion of Debt Service	100%	2,406,741	3,298,139	3,298,331	3,298,156	3,088,693
Five Year Capital Improvements - Net of bond proceeds	20%	5,555,200	5,555,200	5,555,200	5,555,200	5,555,200
Minimum Cash Reserve Levels		\$ 18,569,999	\$ 19,981,015	\$ 20,283,297	\$ 20,603,659	\$ 20,684,909
Projected Cash Reserves		\$ 12,187,249	\$ 9,239,019	\$ 1,755,870	\$ (6,708,635)	\$ (15,238,732)

4. A Power Cost Adjustment (PCA) should be implemented as part of the financial strategy per the methodology provided. The financial projection and rate increase considers the effects of implementing the PCA methodology as recommended to the Board.



NEW BERN

A white, stylized flourish or wave graphic is positioned below the "NEW BERN" text.

New Bern, NC – Electric

May 22, 2024

Dawn Lund - Vice President, Utility Financial Solutions, LLC

Chris Lund – Financial Consultant, Utility Financial Solutions, LLC

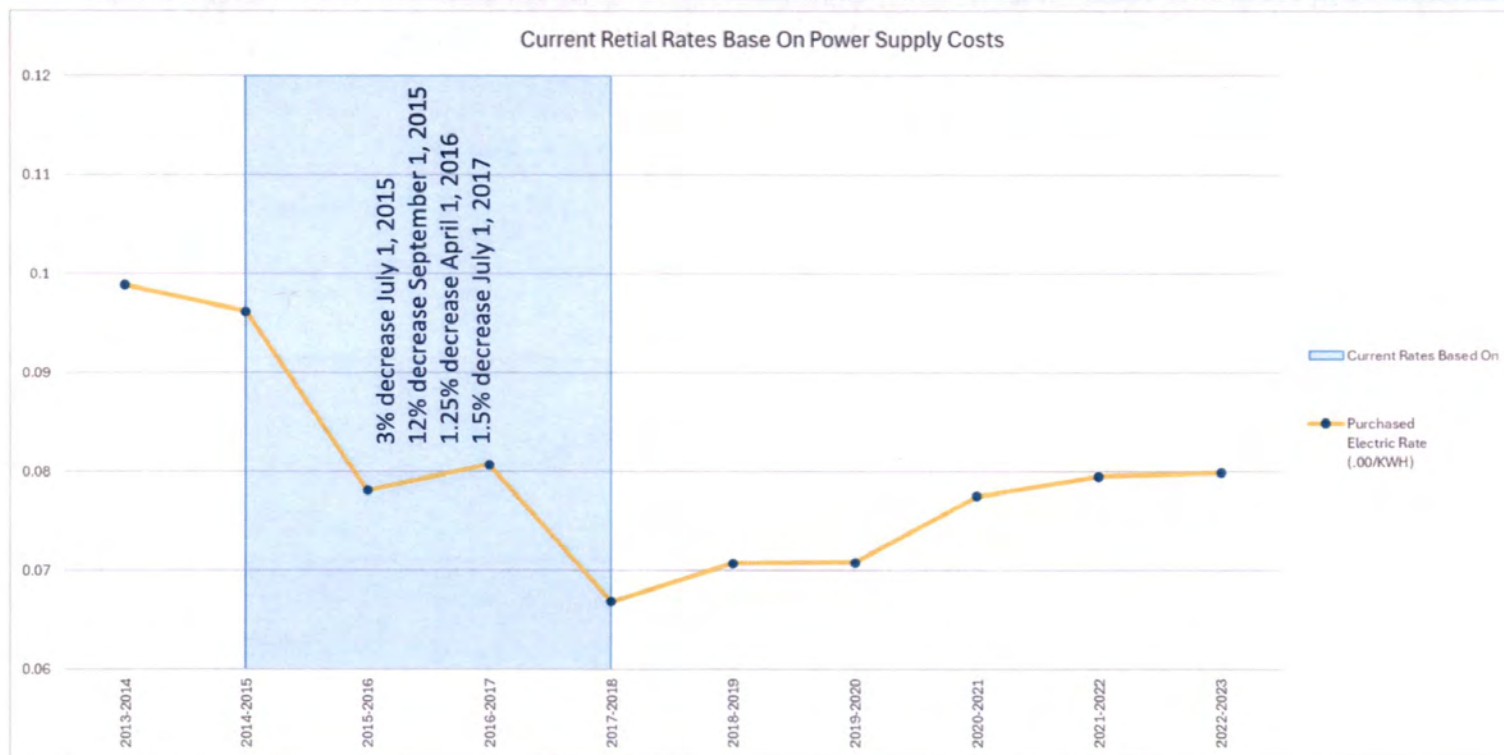
Utility Financial Solutions, LLC

- International consulting firm providing cost of service, financial plans and rate designs to utilities across the country, Canada, Guam and the Caribbean
- Instructors for cost of service and financial planning for APPA, speakers for organizations across the country including AWWA.

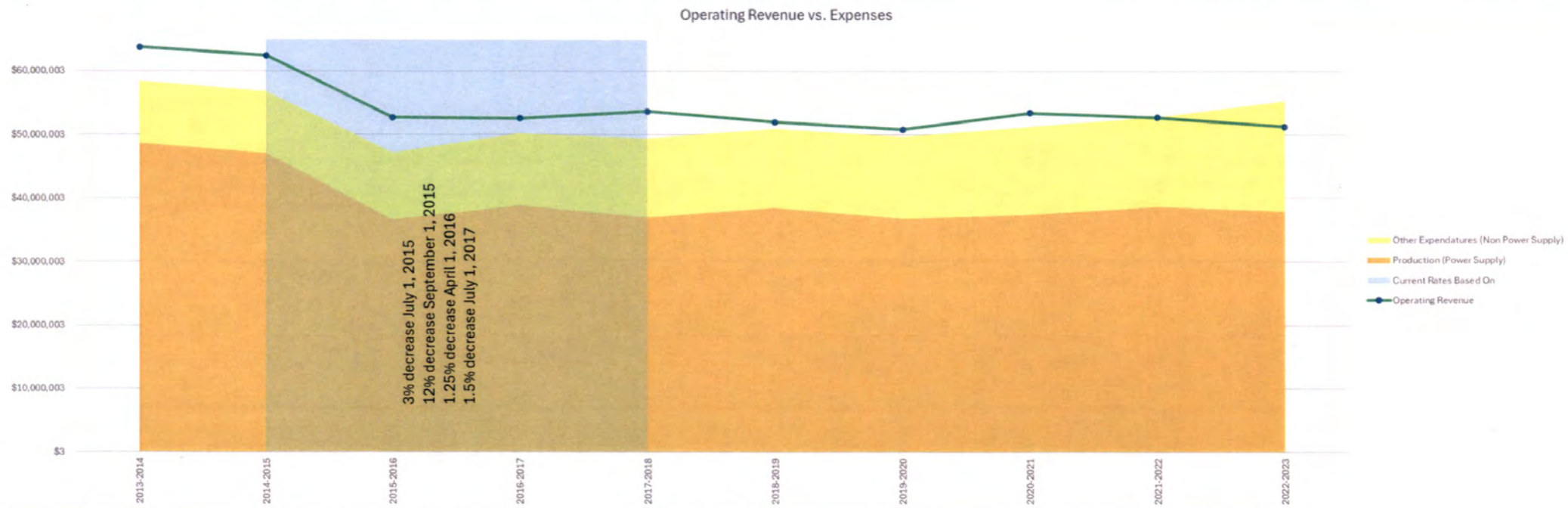
Rate Changes – 10 Year History

- 3% decrease July 1, 2015
- 12% decrease September 1, 2015
- 1.25% decrease April 1, 2016
- 1.5% decrease July 1, 2017

Rate Changes & Power Supply Costs



Operating Revenue vs. Expenses



Expense Detail Major Accounts

53119602 Electric Admin	2020	2021	2022	2023	Forecast 2024	Budget 2024
61 Personnel Services	\$ 527,018	\$ 601,682	\$ 751,801	\$ 816,392	\$ 899,843	\$ 1,147,946
62 Fringe Benefits	214,966	273,487	255,290	374,502	381,989	450,582
53119608 Elec Distribution O & M						
61 Personnel Services	\$ 1,721,079	\$ 1,886,699	\$ 2,033,455	\$ 2,589,618	\$ 3,124,685	\$ 2,886,719
62 Fringe Benefits	815,332	965,118	967,027	1,234,964	1,368,356	1,278,015
53119608 Elec Distribution O & M						
74 Supplies & Materials	393,443	594,357	749,363	1,818,541	1,453,631	1,453,631
PILOT	2,644,000	2,637,550	2,572,550	2,645,443	3,104,596	3,104,596
Totals	\$ 6,315,839	\$ 6,958,892	\$ 7,329,485	\$ 9,479,459	\$ 10,333,101	\$ 10,321,489
Change from 2020 just in these accounts						\$ 4,005,650

Cash History



Age of System

	2018	2024
Historic Investment	\$ 80,134,478	\$ 94,490,306
Net Book Value	35,894,602	36,630,693
Remaining NBV	45%	39%

Cash Reserve Methodology –

	Percent Allocated	Projected 2025	Projected 2026	Projected 2027	Projected 2028	Projected 2029
Operation & Maintenance less Depreciation	12.3%	\$ 6,766,039	\$ 6,448,724	\$ 6,654,574	\$ 6,864,561	\$ 7,056,094
-Historic Rate Base	3%	3,842,019	4,678,952	4,775,192	4,885,742	4,984,922
Current Portion of Debt Service	100%	2,406,741	3,298,139	3,298,331	3,298,156	3,088,693
Five Year Capital Improvements - Net of bond proceeds	20%	5,555,200	5,555,200	5,555,200	5,555,200	5,555,200
Minimum Cash Reserve Levels		\$ 18,569,999	\$ 19,981,015	\$ 20,283,297	\$ 20,603,659	\$ 20,684,909
Projected Cash Reserves		\$ 12,187,249	\$ 9,239,019	\$ 1,755,870	\$ (6,708,635)	\$ (15,238,732)

Financial Projection Summary No Increase No PCA, with Bond Issue

Fiscal Year	Projected Rate Adjustments	Projected Revenues	Projected Expenses	Adjusted Operating Income	Projected Cash Balances	Restricted Cash	Capital Improvements	Bond Issues	Grant Funds	Debt Coverage Ratio
2025	0.00%	55,534,491	59,109,449	(6,702,548)	8,396,636	2,723,934	33,577,000	16,000,000	20,000,000	(2.45)
2026	0.00%	55,624,993	57,759,148	(6,098,678)	4,591,253	2,723,934	27,897,750	27,897,750		(0.58)
2027	0.00%	55,718,120	60,054,837	(8,397,480)	(5,028,270)	2,723,934	3,208,000	-		(0.94)
2028	0.00%	55,813,948	61,899,913	(10,257,278)	(16,892,836)	2,723,934	3,685,000	-		(1.48)
2029	0.00%	55,912,555	63,596,914	(11,954,852)	(29,935,980)	2,723,934	3,306,000	-		(1.95)
Targeted Minimum in 2025				\$ 2,516,202	\$ 18,569,999					1.45
Targeted Minimum in 2029				\$ 3,436,196	\$ 20,684,909					1.45

Financial Projection Summary With Increase no PCA, with Bond Issue

Fiscal Year	Projected Rate Adjustments	Projected Revenues	Projected Expenses	Adjusted Operating Income	Projected Cash Balances	Restricted Cash	Capital Improvements	Bond Issues	Grant Funds	Debt Coverage Ratio
2025	18.00%	64,756,312	59,109,449	2,519,273	17,618,458	2,723,934	33,577,000	16,000,000	20,000,000	5.05
2026	0.00%	64,846,815	57,759,148	3,123,143	23,127,113	2,723,934	27,897,750	27,897,750		3.29
2027	4.00%	67,358,108	60,054,837	3,242,507	25,332,937	2,723,934	3,208,000	-		2.64
2028	3.00%	69,340,106	61,899,913	3,268,879	27,247,858	2,723,934	3,685,000	-		2.70
2029	2.90%	71,316,709	63,596,914	3,449,302	29,881,347	2,723,934	3,306,000	-		2.80
Targeted Minimum in 2025				\$ 2,516,202	\$ 18,569,999					1.45
Targeted Minimum in 2029				\$ 3,436,196	\$ 20,684,909					1.45

Financial Projection Summary With Increase with PCA, with Bond Issue

Fiscal Year	Projected Rate Adjustments	Projected Revenues	Projected Expenses	Adjusted Operating Income	Projected Cash Balances	Restricted Cash	Capital Improvements	Bond Issues	Grant Funds	Debt Coverage Ratio
2025	5.00%	61,886,721	59,109,449	(350,318)	14,748,866	2,723,934	33,577,000	16,000,000	20,000,000	2.72
2026	5.00%	61,695,556	57,759,148	(28,116)	17,077,567	2,723,934	27,897,750	27,897,750		1.97
2027	5.00%	65,883,514	60,054,837	1,767,914	17,748,302	2,723,934	3,208,000	-		2.18
2028	2.00%	68,458,104	61,899,913	2,386,877	18,705,375	2,723,934	3,685,000	-		2.41
2029	2.00%	70,897,137	63,596,914	3,029,730	20,833,866	2,723,934	3,306,000	-		2.65
Targeted Minimum in 2025				\$ 2,516,202	\$ 18,569,999					1.45
Targeted Minimum in 2029				\$ 3,436,196	\$ 20,684,909					1.45

PCA – Wholesale Power Cost Adjustment

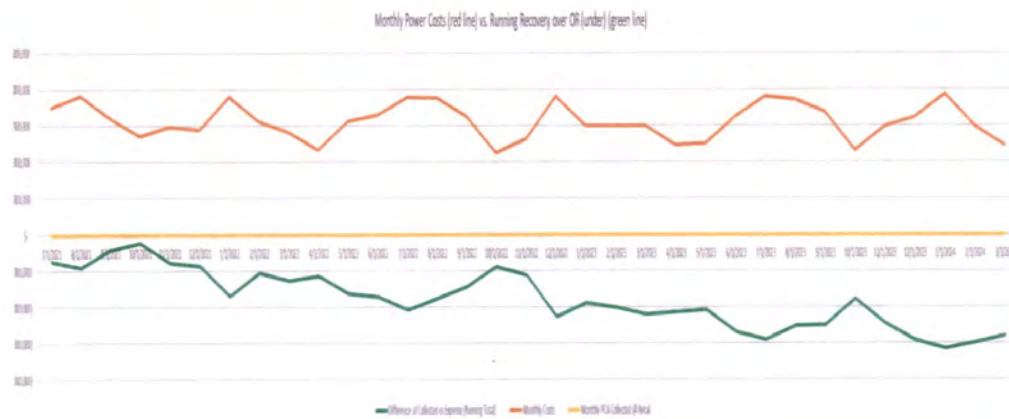
- Mechanism to fairly and smoothly charge customers for varying power costs
- Intended to recoup power costs that are more than what's being collected in retail rates
- Charged on a per kWh basis as an additional fee to balance power cost overages

PCA – Basic Concepts Example

PCA Basic Concepts Example	
\$ 0.0800	PCA base - Typical Power Cost (included in rates)
\$ 0.0850	New Power Cost (future monthly power costs)
\$ 0.0050	PCA to balance old cost with new cost

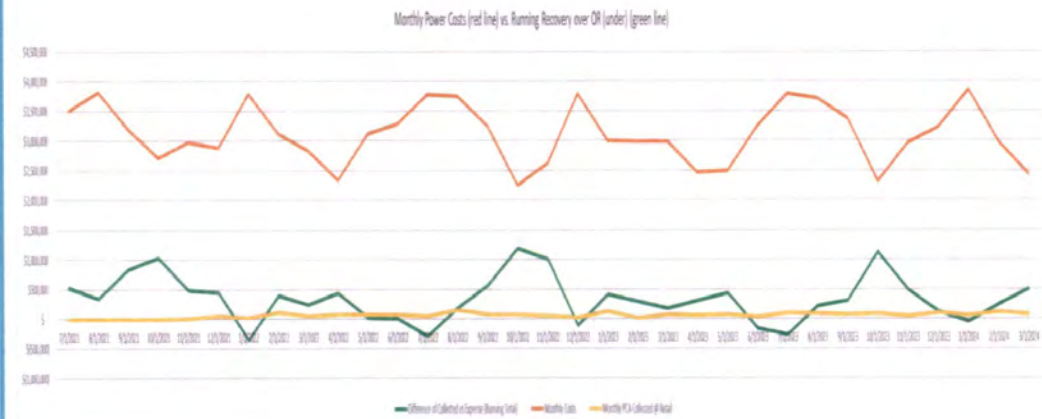
PCA – 33 month example (without and with)

.00 no pca over 33 months ended in under recovery of average of -\$45,000 per month



(without PCA)

.001649 average over 33 months to keep balanced (less than 2 tenths of one cent)



(with PCA)

Rate Impacts – with PCA and 5% Rate Track

E01 RESIDENTIAL

	Current Rate	Customer Bill	FY 2025	Customer Bill	FY 2026	Customer Bill	FY 2027	Customer Bill
Customer Charge	\$ 9.95	\$ 9.95	\$ 12.00	\$ 12.00	\$ 14.00	\$ 14.00	\$ 16.00	\$ 16.00
First 300 kWh	\$ 0.1018	\$ 30.54	\$ 0.1060	\$ 31.80	\$ 0.1105	\$ 33.15	\$ 0.1154	\$ 34.62
All additional kWh	\$ 0.1175	\$ 79.55	\$ 0.1217	\$ 82.39	\$ 0.1262	\$ 85.44	\$ 0.1311	\$ 88.75
Three Phase Charge	\$ 13.67	\$ -	\$ 14.35	\$ -	\$ 15.05	\$ -	\$ 15.80	\$ -
Power Cost Adjustment			\$ 0.0081	\$ 7.91	\$ 0.0081	\$ 7.91	\$ 0.0081	\$ 7.91
Monthly Total		\$ 120.04		\$ 134.10		\$ 140.50		\$ 147.29
Year-to-year monthly billing difference				\$ 14.07		\$ 6.40		\$ 6.79
*Realized cost (\$/kWh)		\$ 0.12		\$ 0.14		\$ 0.14		\$ 0.15
*Customer count: 18,906.								
*Consumption based on 977 kWh.								

Questions?

UFS UTILITY FINANCIAL
SOLUTIONS, LLC



Appendix – Additional Information

Rate Impacts – with PCA and 5% Rate Track

E07 ENERGY EFFICIENT RESIDENTIAL

	Current Rate	Customer Bill	FY 2025	Customer Bill	FY 2026	Customer Bill	FY 2027	Customer Bill
Customer Charge	\$ 9.95	\$ 9.95	\$ 12.00	\$ 12.00	\$ 14.00	\$ 14.00	\$ 16.00	\$ 16.00
First 300 kWh	\$ 0.0968	\$ 29.04	\$ 0.1007	\$ 30.21	\$ 0.1050	\$ 31.50	\$ 0.1096	\$ 32.88
All additional kWh	\$ 0.1116	\$ 75.55	\$ 0.1156	\$ 78.26	\$ 0.1199	\$ 81.17	\$ 0.1245	\$ 84.29
Three Phase Charge	\$ 13.67	\$ -	\$ 14.35	\$ -	\$ 15.05	\$ -	\$ 15.80	\$ -
Power Cost Adjustment			\$ 0.0081	\$ 7.91	\$ 0.0081	\$ 7.91	\$ 0.0081	\$ 7.91
Monthly Total		\$ 114.54		\$ 128.38		\$ 134.59		\$ 141.08
Year-to-year monthly billing difference				\$ 13.84		\$ 6.20		\$ 6.49
*Realized cost (\$/kWh)		\$ 0.12		\$ 0.13		\$ 0.14		\$ 0.14
*Customer count: 1,921.								
*Consumption based on 977 kWh.								

Rate Impacts – with PCA and 5% Rate Track

E40 RESIDENTIAL 100% AC CONTROL

	Current Rate	Customer Bill	FY 2025	Customer Bill	FY 2026	Customer Bill	FY 2027	Customer Bill
Customer Charge	\$ 9.95	\$ 9.95	\$ 12.00	\$ 12.00	\$ 14.00	\$ 14.00	\$ 16.00	\$ 16.00
First 300 kWh	\$ 0.1018	\$ 30.54	\$ 0.1060	\$ 31.80	\$ 0.1105	\$ 33.15	\$ 0.1154	\$ 34.62
>300 TO 800 kWh	\$ 0.1175	\$ 79.55	\$ 0.1217	\$ 82.39	\$ 0.1262	\$ 85.44	\$ 0.1311	\$ 88.75
all additional kWh	\$ 0.1013	\$ -	\$ 0.1026	\$ -	\$ 0.1044	\$ -	\$ 0.1065	\$ -
Three Phase Charge	\$ 13.67	\$ -	\$ 14.35	\$ -	\$ 15.05	\$ -	\$ 15.80	\$ -
Power Cost Adjustment			\$ 0.0081	\$ 7.91	\$ 0.0081	\$ 7.91	\$ 0.0081	\$ 7.91
Monthly Total		\$ 120.04		\$ 134.10		\$ 140.50		\$ 147.29
Year-to-year monthly billing difference				\$ 14.07		\$ 6.40		\$ 6.79
*Realized cost (\$/kWh)		\$ 0.12		\$ 0.14		\$ 0.14		\$ 0.15
*Customer count: 1.								
*Consumption based on 977 kWh.								

Rate Impacts – with PCA and 5% Rate Track

E50 ENERGY EFFICIENT RESIDENTIAL & 100 % AC CONTROL

	Current Rate	Customer Bill	FY 2025	Customer Bill	FY 2026	Customer Bill	FY 2027	Customer Bill
Customer Charge	\$ 9.95	\$ 9.95	\$ 12.00	\$ 12.00	\$ 14.00	\$ 14.00	\$ 16.00	\$ 16.00
First 300 kWh	\$ 0.0968	\$ 29.04	\$ 0.1007	\$ 30.21	\$ 0.1050	\$ 31.50	\$ 0.1096	\$ 32.88
300 TO 800 kWh	\$ 0.1116	\$ 75.55	\$ 0.1156	\$ 78.26	\$ 0.1199	\$ 81.17	\$ 0.1245	\$ 84.25
All additional kWh	\$ 0.0948	\$ -	\$ 0.0940	\$ -	\$ 0.0936	\$ -	\$ 0.0935	\$ -
Three Phase Charge	\$ 13.67	\$ -	\$ 14.35	\$ -	\$ 15.05	\$ -	\$ 15.80	\$ -
Power Cost Adjustment			\$ 0.0081	\$ 7.91	\$ 0.0081	\$ 7.91	\$ 0.0081	\$ 7.91
Monthly Total		\$ 114.54		\$ 128.38		\$ 134.59		\$ 141.08
Year-to-year monthly billing difference				\$ 13.84		\$ 6.20		\$ 6.49
Realized cost (\$/kWh)		\$ 0.12		\$ 0.13		\$ 0.14		\$ 0.14
Customer count: 7.								
Consumption based on 977 kWh.								

Rate Impacts – with PCA and 5% Rate Track

E03 SMALL GENERAL SERVICE

	Current Rate	Customer Bill	FY 2025	Customer Bill	FY 2026	Customer Bill	FY 2027	Customer Bill
Customer Charge	\$ 20.64	\$ 20.64	\$ 25.00	\$ 25.00	\$ 29.50	\$ 29.50	\$ 34.00	\$ 34.00
First 2325 kWh	\$ 0.1260	\$ 79.38	\$ 0.1264	\$ 79.63	\$ 0.1268	\$ 79.88	\$ 0.1275	\$ 80.33
Next 1000 kWh	\$ 0.0960	\$ -	\$ 0.1010	\$ -	\$ 0.1060	\$ -	\$ 0.1120	\$ -
All over 3325 kWh	\$ 0.0900	\$ -	\$ 0.0900	\$ -	\$ 0.0920	\$ -	\$ 0.0980	\$ -
Three Phase Charge	\$ 13.67	\$ -	\$ 14.35	\$ -	\$ 15.05	\$ -	\$ 15.80	\$ -
Power Cost Adjustment			\$ 0.0081	\$ 5.10	\$ 0.0081	\$ 5.10	\$ 0.0081	\$ 5.10
Monthly Total		\$ 100.02		\$ 109.74		\$ 114.49		\$ 119.43
Year-to-year monthly billing difference				\$ 9.72		\$ 4.75		\$ 4.94
*Realized cost (\$/kWh)		\$ 0.16		\$ 0.17		\$ 0.18		\$ 0.19
*Customer count: 2,735.								
*Consumption based on 630 kWh.								

Rate Impacts – with PCA and 5% Rate Track

E04 SMALL GENERAL SERVICE

	Current Rate	Customer Bill	FY 2025	Customer Bill	FY 2026	Customer Bill	FY 2027	Customer Bill
Customer Charge	\$ 20.64	\$ 20.64	\$ 25.00	\$25.00	\$ 29.50	\$ 29.50	\$ 34.00	\$ 34.00
First 2325 kWh	\$ 0.1013	\$ 235.52	\$ 0.1030	\$ 239.48	\$ 0.1048	\$ 243.66	\$ 0.1069	\$ 248.54
Next 1000 kWh	\$ 0.0956	\$ 95.60	\$ 0.0973	\$ 97.30	\$ 0.0991	\$ 99.10	\$ 0.1012	\$ 101.20
All over 3325 kWh	\$ 0.0887	\$ 66.53	\$ 0.0904	\$ 67.80	\$ 0.0922	\$ 69.15	\$ 0.0943	\$ 70.73
Demand Charge	\$ 2.31	\$ 34.65	\$ 3.00	\$ 45.00	\$ 3.75	\$ 56.25	\$ 4.50	\$ 67.50
Three Phase Charge	\$ 13.67	\$ -	\$ 14.35	\$ -	\$ 15.05	\$ -	\$ 15.80	\$ -
Power Cost Adjustment			\$ 0.0081	\$ 33.01	\$ 0.0081	\$ 33.01	\$ 0.0081	\$ 33.01
Monthly Total		\$ 452.94		\$ 507.58		\$ 530.67		\$ 554.98
Year-to-year monthly billing difference				\$ 54.65		\$ 23.09		\$ 24.31
*Realized cost (\$/kWh)		\$ 0.11		\$ 0.12		\$ 0.13		\$ 0.14
*Customer count: 640.								
*Consumption based on 4075 kWh and 15 kW.								

Rate Impacts – with PCA and 5% Rate Track

E08 MEDIUM GENERAL SERVICE

	Current Rate	Customer Bill	FY 2025	Customer Bill	FY 2026	Customer Bill	FY 2027	Customer Bill
Customer Charge	\$ 22.80	\$ 22.80	\$ 27.00	\$ 27.00	\$ 31.50	\$ 31.50	\$ 36.00	\$ 36.00
kWh	\$ 0.0842	\$ 1,060.58	\$ 0.0863	\$ 1,087.03	\$ 0.0893	\$ 1,124.82	\$ 0.0926	\$ 1,166.39
Demand	\$ 8.08	\$ 331.85	\$ 9.00	\$ 369.63	\$ 9.75	\$ 400.43	\$ 10.50	\$ 431.24
Three Phase Charge	\$ 13.67	\$ 13.67	\$ 14.35	\$ 14.35	\$ 15.05	\$ 15.05	\$ 15.80	\$ 15.80
Power Cost Adjustment			\$ 0.0081	\$ 102.03	\$ 0.0081	\$ 102.03	\$ 0.0081	\$ 102.03
Monthly Total		\$ 1,428.90		\$ 1,600.04		\$ 1,673.83		\$ 1,751.45
Year-to-year monthly billing difference				\$ 171.14		\$ 73.79		\$ 77.62
*Realized cost (\$/kWh)		\$ 0.11		\$ 0.13		\$ 0.13		\$ 0.14
*Customer count: 259.								
*Consumption based on 12,596 kWh and 41.07 kW.								

Rate Impacts – with PCA and 5% Rate Track

E10 MEDIUM GENERAL SERVICE

	Current Rate	Customer Bill	FY 2025	Customer Bill	FY 2026	Customer Bill	FY 2027	Customer Bill
Customer Charge	\$ 22.80	\$ 22.80	\$ 27.00	\$ 27.00	\$ 31.50	\$ 31.50	\$ 36.00	\$ 36.00
kWh	\$ 0.0800	\$ 3,944.56	\$ 0.0829	\$ 4,087.55	\$ 0.0862	\$ 4,250.26	\$ 0.0898	\$ 4,427.77
Demand	\$ 8.95	\$ 971.61	\$ 9.75	\$ 1,058.46	\$ 10.50	\$ 1,139.88	\$ 11.25	\$ 1,221.30
Three Phase Charge	\$ 13.67	\$ -	\$ 14.35	\$ 14.35	\$ 15.05	\$ 15.05	\$ 15.80	\$ 15.80
Power Cost Adjustment			\$ 0.0081	\$ 399.39	\$ 0.0081	\$ 399.39	\$ 0.0081	\$ 399.39
Monthly Total		\$ 4,938.97		\$ 5,586.75		\$ 5,836.08		\$ 6,100.26
Year-to-year monthly billing difference				\$ 647.78		\$ 249.33		\$ 264.18
*Realized cost (\$/kWh)		\$ 0.10		\$ 0.11		\$ 0.12		\$ 0.12
*Customer count: 80.								
*Consumption based on 49,307 kWh and 108.56 Kw.								

Rate Impacts – with PCA and 5% Rate Track

E11 (TOU) MEDIUM GENERAL SERVICE

	Current Rate	Customer Bill	FY 2025	Customer Bill	FY 2026	Customer Bill	FY 2027	Customer Bill
Customer Charge	\$ 56.78	\$ 56.78	\$ 60.00	\$ 60.00	\$ 63.00	\$ 63.00	\$ 66.00	\$ 66.00
kWh	\$ 0.0601	\$ 117.62	\$ 0.0606	\$ 118.59	\$ 0.0630	\$ 123.29	\$ 0.0655	\$ 128.18
On Peak Demand	\$ 21.57	\$ 261.00	\$ 27.00	\$ 326.70	\$ 27.75	\$ 335.78	\$ 28.50	\$ 344.85
Excess Demand	\$ 5.19	\$ 257.42	\$ 6.00	\$ 297.60	\$ 6.75	\$ 334.80	\$ 7.50	\$ 372.00
Power Cost Adjustment			\$ 0.0081	\$ 15.85	\$ 0.0081	\$ 15.85	\$ 0.0081	\$ 15.85
Monthly Total		\$ 692.82		\$ 818.75		\$ 872.72		\$ 926.89
Year-to-year monthly billing difference				\$ 125.93		\$ 53.97		\$ 54.17
*Realized cost (\$/kWh)		\$ 0.35		\$ 0.42		\$ 0.45		\$ 0.47
*Customer count: 0.								
*Consumption based on 1957 kWh and 12.1 kW on peak, 49.6 kW off peak.								

Rate Impacts – with PCA and 5% Rate Track

E12 MEDIUM GENERAL SERVICE (CP)

	Current Rate	Customer Bill	FY 2025	Customer Bill	FY 2026	Customer Bill	FY 2027	Customer Bill
Customer Charge	\$ 82.24	\$ 82.24	\$ 90.00	\$ 90.00	\$ 97.50	\$ 97.50	\$ 105.00	\$ 105.00
kWh	\$ 0.0601	\$ 4,964.38	\$ 0.0607	\$ 5,013.94	\$ 0.0630	\$ 5,203.93	\$ 0.0655	\$ 5,410.43
CP Demand	\$ 22.12	\$ 682.84	\$ 27.00	\$ 833.49	\$ 27.75	\$ 856.64	\$ 28.50	\$ 879.80
Excess Demand	\$ 5.24	\$ 770.49	\$ 6.00	\$ 882.24	\$ 6.75	\$ 992.52	\$ 7.50	\$ 1,102.80
Power Cost Adjustment			\$ 0.0081	\$ 669.08	\$ 0.0081	\$ 669.08	\$ 0.0081	\$ 669.08
Monthly Total		\$ 6,499.95		\$ 7,488.75		\$ 7,819.66		\$ 8,167.10
Year-to-year monthly billing difference				\$ 988.79		\$ 330.92		\$ 347.44
*Realized cost (\$/kWh)		\$ 0.08		\$ 0.09		\$ 0.09		\$ 0.10
*Customer count: 27.								
*Consumption based on 82,602 kWh and 30.87 CP and 147.04 excess.								

Rate Impacts – with PCA and 5% Rate Track

E13 LARGE GENERAL SERVICE (CP)

	Current Rate	Customer Bill	FY 2025	Customer Bill	FY 2026	Customer Bill	FY 2027	Customer Bill
Customer Charge	\$ 166.06	\$ 166.06	\$ 175.00	\$ 175.00	\$ 184.00	\$ 184.00	\$ 193.00	\$ 193.00
kWh	\$ 0.0561	\$ 26,942.59	\$ 0.0568	\$ 27,278.77	\$ 0.0590	\$ 28,335.34	\$ 0.0614	\$ 29,487.96
CP Demand	\$ 26.84	\$ 3,535.63	\$ 27.00	\$ 3,556.71	\$ 27.75	\$ 3,655.51	\$ 28.50	\$ 3,754.31
Excess Demand	\$ 4.43	\$ 3,662.41	\$ 6.00	\$ 4,960.38	\$ 6.75	\$ 5,580.43	\$ 7.50	\$ 6,200.48
Power Cost Adjustment			\$ 0.0081	\$ 3,890.11	\$ 0.0081	\$ 3,890.11	\$ 0.0081	\$ 3,890.11
Monthly Total		\$ 34,306.69		\$ 39,860.96		\$ 41,645.38		\$ 43,525.85
Year-to-year monthly billing difference				\$ 5,554.27		\$ 1,784.42		\$ 1,880.47
*Realized cost (\$/kWh)		\$ 0.07		\$ 0.08		\$ 0.09		\$ 0.09
*Customer count: 3.								
*Consumption based on 480,260 kWh and 131.73 CP and 826.73 excess.								

Rate Impacts – with PCA and 5% Rate Track

E06 LARGE GENERAL SERVICE (CP)

	Current Rate	Customer Bill	FY 2025	Customer Bill	FY 2026	Customer Bill	FY 2027	Customer Bill
Customer Charge	\$ 1,214.06	\$ 1,214.06	\$ 1,250.00	\$ 1,250.00	\$ 1,285.00	\$ 1,285.00	\$ 1,320.00	\$ 1,320.00
First 1,700,000 kWh	\$ 0.0529	\$ 88,792.65	\$ 0.0529	\$ 88,792.65	\$ 0.0543	\$ 91,142.55	\$ 0.0564	\$ 94,667.40
All additional kWh	\$ 0.0445	\$ -	\$ 0.0445	\$ -	\$ 0.0543	\$ -	\$ 0.0564	\$ -
CP Demand First 3,200 kW	\$ 26.84	\$ 3,140.28	\$ 27.00	\$ 3,159.00	\$ 27.75	\$ 3,246.75	\$ 28.50	\$ 3,334.50
CP Demand Additional kW	\$ 14.94	\$ -	\$ 27.00	\$ -	\$ 27.75	\$ -	\$ 28.50	\$ -
Excess Demand Charge	\$ 4.19	\$ 12,498.77	\$ 6.00	\$ 17,898.00	\$ 6.75	\$ 20,135.25	\$ 7.50	\$ 22,372.50
Power Cost Adjustment			\$ 0.0081	\$ 13,595.85	\$ 0.0081	\$ 13,595.85	\$ 0.0081	\$ 13,595.85
Monthly Total		\$ 104,431.70		\$ 123,445.50		\$ 128,120.40		\$ 133,970.25
Year-to-year monthly billing difference				\$ 19,013.80		\$ 4,674.90		\$ 5,849.85
*Realized cost (\$/kWh)		\$ 0.06		\$ 0.07		\$ 0.08		\$ 0.08
*Customer count: 1.								
*Consumption based on 1,678,500 kWh and 117 CP and 2983 excess.								

Rate Impacts – with PCA and 5% Rate Track

EDR5 ECONOMIC DEVELOPMENT LGS (CP)

	Current Rate	Customer Bill	FY 2025	Customer Bill	FY 2026	Customer Bill	FY 2027	Customer Bill
Customer Charge	\$ 197.00	\$ 197.00	\$ 205.00	\$ 205.00	\$ 215.00	\$ 215.00	\$ 225.00	\$ 225.00
kWh	\$ 0.0444	\$ 21,323.54	\$ 0.0445	\$ 21,371.57	\$ 0.0480	\$ 23,052.48	\$ 0.0520	\$ 24,973.52
CP Demand	\$ 26.84	\$ 3,535.63	\$ 27.00	\$ 3,556.71	\$ 27.75	\$ 3,655.51	\$ 28.50	\$ 3,754.31
Excess Demand	\$ 3.94	\$ 3,257.32	\$ 6.00	\$ 4,960.38	\$ 6.75	\$ 5,580.43	\$ 7.50	\$ 6,200.48
Power Cost Adjustment			\$ 0.0081	\$ 3,890.11	\$ 0.0081	\$ 3,890.11	\$ 0.0081	\$ 3,890.11
Monthly Total		\$ 28,313.49		\$ 33,983.77		\$ 36,393.52		\$ 39,043.41
Year-to-year monthly billing difference				\$ 5,670.27		\$ 2,409.76		\$ 2,649.89
*Realized cost (\$/kWh)		\$ 0.06		\$ 0.07		\$ 0.08		\$ 0.08
*Customer count: 0.								
*Consumption based on 480,260 kWh and 131.73 CP and 826.73 excess.								

Rate Impacts – with PCA and 5% Rate Track

E09 SMALL WHOLESALE

	Current Rate	Customer Bill	FY 2025	Customer Bill	FY 2026	Customer Bill	FY 2027	Customer Bill
Customer Charge	\$ 21.78	\$ 21.78	\$ 27.00	\$ 27.00	\$ 33.00	\$ 33.00	\$ 39.00	\$ 39.00
kWh	\$ 0.0859	\$ 97.07	\$ 0.0870	\$ 98.31	\$ 0.0856	\$ 96.73	\$ 0.0846	\$ 95.60
Demand	\$ 6.69	\$ 41.75	\$ 7.00	\$ 43.68	\$ 7.75	\$ 48.36	\$ 8.50	\$ 53.04
Power Cost Adjustment			\$ 0.0081	\$ 9.15	\$ 0.0081	\$ 9.15	\$ 0.0081	\$ 9.15
Monthly Total		\$ 160.59		\$ 178.14		\$ 187.24		\$ 196.79
Year-to-year monthly billing difference				\$ 17.55		\$ 9.10		\$ 9.55
*Realized cost (\$/kWh)		\$ 0.14		\$ 0.16		\$ 0.17		\$ 0.17
*Customer count: 27.								
*Consumption based on 1,130 kWh and 6.24 kW.								

Rate Impacts – with PCA and 5% Rate Track

LPDS LOAD PROFILE DATA SERVICE

	Current Rate	Customer Bill	FY 2025	Customer Bill	FY 2026	Customer Bill	FY 2027	Customer Bill
Setup Fee	\$ 150.00	\$ -	\$ 157.50	\$ -	\$ 165.40	\$ -	\$ 173.65	\$ -
Day After Service Fee	\$ 40.50	\$ 40.50	\$ 42.50	\$ 42.50	\$ 44.65	\$ 44.65	\$ 46.90	\$ 46.90
Same Day Service Fee	\$ 90.00	\$ -	\$ 94.50	\$ -	\$ 99.25	\$ -	\$ 104.20	\$ -
Monthly Total		\$ 40.50		\$ 42.50		\$ 44.65		\$ 46.90
Year-to-year monthly billing difference				\$ 2.00		\$ 2.15		\$ 2.25
Customer count: 4.								

Rate Impacts – with PCA and 5% Rate Track

E14 COMMERCIAL EV CHARGING

	Current Rate	Customer Bill	FY 2025	Customer Bill	FY 2026	Customer Bill	FY 2027	Customer Bill
Customer Charge	\$ 166.06	\$ 166.06	\$ 175.00	\$175.00	\$ 184.00	\$ 184.00	\$ 193.00	\$ 193.00
Load Factor less than or equal to 10%	\$ 0.1010	\$ 1,860.12	\$ 0.1018	\$ 1,874.85	\$ 0.1040	\$ 1,915.37	\$ 0.1064	\$ 1,959.57
Load Factor > 10% and <or equal to 20%	\$ 0.0786	\$ -	\$ 0.0793	\$ -	\$ 0.0815	\$ -	\$ 0.0839	\$ -
Load Factor greater than 20%	\$ 0.0561	\$ -	\$ 0.0568	\$ -	\$ 0.0590	\$ -	\$ 0.0614	\$ -
CP Demand	\$ 26.84	\$ 1,637.24	\$ 27.00	\$ 1,647.00	\$ 27.75	\$ 1,692.75	\$ 28.50	\$ 1,738.50
Excess Demand	\$ 4.43	\$ 1,444.18	\$ 6.00	\$ 1,956.00	\$ 6.75	\$ 2,200.50	\$ 7.50	\$ 2,445.00
Power Cost Adjustment			\$ 0.0081	\$ 149.18	\$ 0.0081	\$ 149.18	\$ 0.0081	\$ 149.18
Monthly Total		\$ 4,941.54		\$ 5,627.03		\$ 5,957.80		\$ 6,292.25
Year-to-year monthly billing difference				\$ 685.49		\$ 330.77		\$ 334.45
*Realized cost (\$/kWh)		\$ 0.68		\$ 0.77		\$ 0.82		\$ 0.86
*Customer count: 4.								
*Consumption based on 18,417 kWh, 61 CP, and 326 excess.								

Rate Impacts – with PCA and 5% Rate Track

E15 UTILITY OWNED EV CHARGING

	Current Rate	Customer Bill	FY 2025	Customer Bill	FY 2026	Customer Bill	FY 2027	Customer Bill
Load Factor less than or equal to 10%	\$ 0.68	\$ 24.70	\$ 0.71	\$ 25.79	\$ 0.75	\$ 27.25	\$ 0.79	\$ 28.70
Load Factor > 10% and <= 20%	\$ 0.47	\$ -	\$ 0.49	\$ -	\$ 0.51	\$ -	\$ 0.54	\$ -
Load Factor greater than 20%	\$ 0.38	\$ -	\$ 0.40	\$ -	\$ 0.42	\$ -	\$ 0.44	\$ -
Inactive Charging	\$ 0.17	\$ -	\$ 0.18	\$ -	\$ 0.19	\$ -	\$ 0.20	\$ -
Power Cost Adjustment			\$ 0.0081	\$ 0.29	\$ 0.0081	\$ 0.29	\$ 0.0081	\$ 0.29
Monthly Total		\$ 24.70		\$ 26.09		\$ 27.54		\$ 28.99
Year-to-year monthly billing difference				\$ 1.38		\$ 1.45		\$ 1.45
Realized cost (\$/kWh)		\$ 0.68		\$ 0.72		\$ 0.76		\$ 0.80
Customer count: varies.								
Consumption based on 36.33 kWh.								

Financial Projection Summary No Increase with PCA, with Bond Issue

Fiscal Year	Projected Rate Adjustments	Projected Revenues	Projected Expenses	Adjusted Operating Income	Projected Cash Balances	Restricted Cash	Capital Improvements	Bond Issues	Grant Funds	Debt Coverage Ratio
2025	0.00%	\$ 59,325,104	\$ 59,909,449	\$ (3,711,935)	\$ 10,579,249	\$ 2,723,934	\$ 33,577,000	\$ 16,000,000	\$ 20,000,000	(0.03)
2026	0.00%	56,444,241	58,582,348	(6,102,631)	6,791,739	2,723,934	27,897,750	27,897,750		(0.57)
2027	0.00%	57,808,016	60,901,910	(7,154,657)	(1,562,955)	2,723,934	3,208,000	-		(0.56)
2028	0.00%	59,196,449	62,771,551	(7,746,415)	(10,916,658)	2,723,934	3,685,000	-		(0.72)
2029	0.00%	60,425,602	64,493,829	(8,338,720)	(20,343,669)	2,723,934	3,306,000	-		(0.86)
Targeted Minimum in 2025				\$ 2,516,202	\$ 18,668,399					1.45
Targeted Minimum in 2029				\$ 3,436,196	\$ 19,133,589					1.45

CIP – 5 Year Capital Improvement Plan

Department	Org/Division	Object	FYE 25	FYE26	FYE27	FYE28	FYE29	Total	Grant Ask	Description
Electric	9602 Electric Admin	75210 Motor Vehicles	\$ 60,000					\$ 60,000	\$ -	Replace 2010 N-4 hybrid
Electric	9602 Electric Admin	75210 Motor Vehicles	\$ 60,000	\$ 60,000	\$ 60,000	\$ 60,000	\$ 60,000	\$ 240,000	\$ -	Fleet Attrition
Electric	9602 Electric Admin	75210 Motor Vehicles				\$ 40,000		\$ 40,000	\$ -	Fleet Attrition
Electric	9608 Distribution O&M	75190 Other Equipment				\$ 50,000		\$ 50,000	\$ -	Replace Cable/Fault Locator
Electric	9608 Distribution O&M	75190 Other Equipment		\$ 35,000	\$ 35,000	\$ 35,000		\$ 105,000	\$ -	Replace Skid Steer Attachment
Electric	9608 Distribution O&M	75190 Other Equipment				\$ 75,000		\$ 75,000	\$ -	Replace Chipper
Electric	9608 Distribution O&M	75190 Other Equipment			\$ 15,000	\$ 15,000		\$ 30,000	\$ -	Replace Wire reel trailer
Electric	9608 Distribution O&M	75190 Other Equipment		\$ 110,000		\$ 110,000		\$ 220,000	\$ -	Replace Back Hoe
Electric	9608 Distribution O&M	75190 Other Equipment		\$ 60,000				\$ 60,000	\$ -	Replace Flat bed equipment trailer
Electric	9608 Distribution O&M	75190 Other Equipment	\$ 12,000					\$ 12,000	\$ -	Traffic control sign board
Electric	9609 Distribution O&M	75190 Other Equipment	\$ 55,000					\$ 55,000	\$ -	2 Portable light towers
Electric	9608 Distribution O&M	75190 Other Equipment			\$ 18,000			\$ 18,000	\$ -	Replace Cable Puller
Electric	9607 Distribution O&M	75210 Motor Vehicles	\$ 400,000					\$ 400,000	\$ -	Replace 2005 Line Truck / Digger Derrick U-75
Electric	9608 Distribution O&M	75210 Motor Vehicles		\$ 450,000	\$ 450,000	\$ 450,000	\$ 450,000	\$ 1,350,000	\$ -	Replace Line Truck
Electric	9608 Distribution O&M	75210 Motor Vehicles	\$ 90,000	\$ 80,000	\$ 80,000	\$ 80,000	\$ 80,000	\$ 330,000	\$ -	Replace Service Truck 1989 U-71
Electric	9608 Distribution O&M	75210 Motor Vehicles				\$ 220,000	\$ 220,000	\$ 220,000	\$ -	Replace Trencher
Electric	9608 Distribution O&M	75210 Motor Vehicles		\$ 80,000	\$ 80,000	\$ 80,000	\$ 80,000	\$ 240,000	\$ -	Replace Dump Truck
Electric	9608 Distribution O&M	75410 Bldgs & Improvements	\$ 250,000	\$ 250,000	\$ 250,000	\$ 250,000	\$ 250,000	\$ 1,000,000	\$ -	Greenbrier
Electric	9609 Distribution O&M	75410 Bldgs & Improvements	\$ 2,000,000					\$ 2,000,000	\$ -	212 Kale Rd Expansion
					\$ 2,000,000	\$ 2,000,000	\$ 2,000,000			System Improvement TBD
Electric	9608 Distribution O&M	75410 Bldgs & Improvements	\$ 400,000					\$ 400,000	\$ -	Old Town River Crossing
Electric	9610 Power Supply	75190 Other Equipment	\$ 35,000	\$ 35,000	\$ 35,000	\$ 35,000	\$ 35,000	\$ 140,000	\$ -	Substation Battery Banks
Electric	9610 Power Supply	75190 Other Equipment	\$ 60,000	\$ 60,000	\$ 60,000			\$ 180,000	\$ -	Substation security systems
Electric	9610 Power Supply	75190 Other Equipment	\$ 30,000,000					\$ 30,000,000	\$ 20,000,000	Electric System Capacity Project (split 9610/08?)
Electric	9610 Power Supply	75190 Other Equipment		\$ 20,000,000					\$ -	Generation fleet attrition
Electric	9610 Power Supply	75190 Other Equipment		\$ 6,000,000				\$ 6,000,000	\$ -	Glenburnie transformer 3 of 3
Electric	9610 Power Supply	75210 Motor Vehicles		\$ 60,000		\$ 60,000		\$ 120,000	\$ -	Vehicle Purchase
Electric	9612 Communications Control	75190 Other Equipment						\$ -	\$ -	DataVoice OMS Add on
Electric	9612 Communications Control	75190 Other Equipment		\$ 264,500				\$ 264,500	\$ -	EOC Monitor and control
Electric	9612 Communications Control	75190 Other Equipment		\$ 70,000				\$ 70,000	\$ -	Workforce Management
Electric	9612 Communications Control	75190 Other Equipment		\$ 20,000				\$ 20,000	\$ -	DataVoice OMS Add on
Electric	9612 Communications Control	75190 Other Equipment		\$ 10,250				\$ 10,250	\$ -	Daupler IRMS
Electric	9612 Communications Control	75190 Other Equipment		\$ 22,000				\$ 22,000	\$ -	DataVoice OMS Add on
Electric	9612 Communications Control	75190 Other Equipment		\$ 6,000			\$ 6,000	\$ 6,000	\$ -	UPS Batteries
Electric	9612 Communications Control	75210 Motor Vehicles	\$ 60,000	\$ 60,000	\$ 60,000	\$ 60,000	\$ 60,000	\$ 240,000	\$ -	Replace 2013 Ford Explorer Y-2
Electric	9614 Utility Business Office	75190 Other Equipment		\$ 100,000				\$ 100,000	\$ -	AMI Hosted Server
Electric	9614 Utility Business Office	75190 Other Equipment	\$ 30,000					\$ 30,000	\$ -	Meter Test set
Electric	9614 Utility Business Office	75210 Motor Vehicles	\$ 65,000	\$ 65,000	\$ 65,000	\$ 65,000	\$ 65,000	\$ 260,000	\$ -	UBO Vehicle
Electric	9618 Customer & Payment Services	75210 Motor Vehicles			\$ 65,000			\$ 65,000	\$ -	
Electric Total			\$ 33,577,000	\$ 27,897,750	\$ 3,208,000	\$ 3,685,000	\$ 3,306,000	\$ 44,367,750	\$ 20,000,000	

Rate Plan Fact Sheet



- Utility Director is recommending a financially responsible rate plan to include 5% rate increases in FYE 25, 26, & 27 plus a Power Cost Adjustment (PCA). This will be reviewed annually. As an alternative, a one year 18% rate increase with no PCA is recommended.
- City owned and operated electric systems are one the most valuable assets for local communities and should be promoted as such. Municipally owned electric utilities are the shining star for communities across the country.
- The City owned Electric Utility contributes nearly \$3M annually to the City’s general fund . The Utility pays \$2M towards City services including Finance, Warehouse, HR, IT, & Admin.
- Response to customer service, severe weather, interruptions in services and civic activities is unmatched by investor owned utilities.

YEAR	RATE PLAN	ALTERNATIVE NO PCA
FYE 25	5% + PCA	18%
FYE 26	5% + PCA	0%
FYE 27	5% + PCA	4%

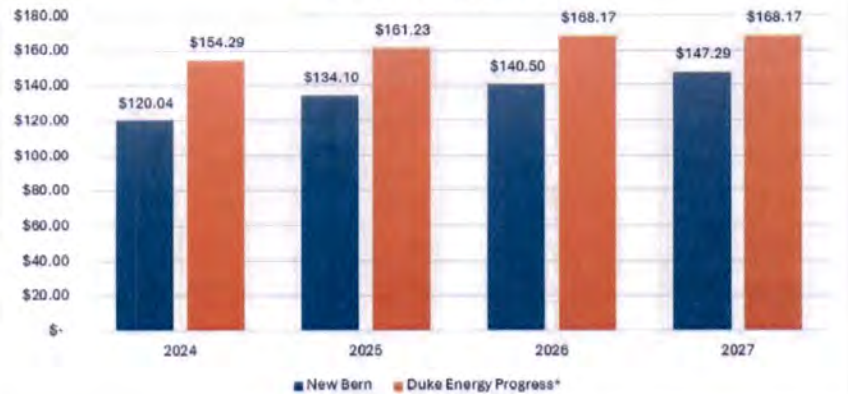
RATES: Designed to recover operating, capital, and power supply expenses.

PCA: Designed to recover variable power supply expenses not recovered by rates. Power Supply costs vary with weather, fuel, contractual and legislative mandates. Functions similarly to a fuel charge.

How do we compare?

- The City of New Bern has the lowest electric rates in our community compared to Duke Energy Progress (DEP).
- In FYE 2025, the proposed rate increase is still 18% less than Duke Energy Progress. (\$27.13 less)
- In FYE 25, the City of New Bern Typical Residential monthly bill is \$10.29 less than 2014's monthly bill.

New Bern/Duke Energy Progress Residential Monthly Utility Bill Comparison



Residential comparison chart calculated with 977 kWh. Calculated using City of New Bern 2023 EIA residential average consumption and electric rates available on the above-mentioned utilities websites.

** DEP rates Includes 9.9% increase effective 10/1/23, 4.5% increase on 10/1/24, and 4.3% increase on 10/1/25*

Impact on Typical Residential Customer:

New Bern Recommended Rate Plan	FYE 2024	FYE 2025	FYE 2026	FYE 2027
Rate Adjustment (%) (Fixed)		5%	5%	5%
Power Cost Adjustment (\$/kWh) Variable		\$0.0081	\$0.0081	\$0.0081
Typical Residential Monthly (\$)	\$ 120.04	\$ 134.10	\$ 140.50	\$ 147.29
Realized Cost (\$/kWh)	\$ 0.12	\$ 0.14	\$ 0.14	\$ 0.15

Why is rate increase needed?

- The rate stabilization fund has been depleted.
- The Electric Fund balance is below our own 90 day cash on hand policy.
 - \$10.2M below policy FYE 25 or ~40 days cash on hand.
 - Negative cash balance projected by FYE 27.
 - Financial consultants recommend increasing policy to a minimum of 120 days with a goal of 200 days.
- Utility finances at risk to lenders and stakeholders.
- 70% of the utility expenses are the cost of purchased power. Power Cost increased \$3M this year and forecasted to continue to increase.
- Power supply debt rolls off July 2025 (\$3.3M) annually. Debt roll off is not enough to rebuild cash reserves. Debt roll of reduction offset by power supply cost increases in FYE 25.
- Sales not keeping pace with expenses and inflation (18%-900%).
- Old electric system = larger capital improvements to maintain and modernize the system.
 - Remaining system net book value is 39%, indicating an old system.
 - Cannot support N-1 contingencies.
 - Minimal capabilities to prevent disruptions and interruptions.
 - Minimal capabilities to reroute power to distressed communities.

Capital Improvements Needed:

- The Utility is facing capacity limitations in Substations, Wires, and Hardware.
- 3 Substation transformers are now beyond useful life at 50 years old.
- Generation fleet beyond useful life of 20 years.
- The Utility has applied for two grants which will require matches.
 - GRIP grant: \$48M with \$13M match.
 - Power Up Grant: \$1M with \$333K match.

Forecasted Pressures:

- Power purchases and sales vary with weather.
- Sales are flat.
 - 600-700 new homes = \$1M in revenue.
- Response to severe weather and outage restoration.
- Carbon reduction mandates that will pressure power supply costs.
- EV Adoption pressuring capacity.

Summary:

- Utility Director recommends financially responsible rate plan of 5% rate increases in FY 25, 26, & 27 plus a PCA.
 - Alternative is one year 18% increase with no PCA.
- Typical residential customer impact:
 - FYE 25 - \$14.07/month
 - FYE 26 - \$6.40/month
 - FYE 27 - \$6.79/month
- Electric Fund balance projected to be negative by FYE 27 with no increases.
- With this rate plan, City of New Bern's electric rates will still be lower than they were 10 years ago.
- City of New Bern lowered electric rates a total of 17.5% over 2015, 2016, & 2017.
- City of New Bern will still have the lowest electric rates in our community.

The Electric Utility is sensitive to the financial pressures our customers face and recognize there is never a good time to implement a rate increase. However, tremendous inflationary pressure to the Utility coupled with an increase in our monthly Wholesale Power bill have made it impossible to continue providing safe, reliable electricity to our customers without a rate increase.

New Bern, NC
Electric Department
2025-2027 Rate Design

Note that a PCA is assumed to be implemented beginning FY2025 and are in addition to these base rates and revenues.
Calculations based on 2023 usage data.

	Revenue Current Rates	Proposed 2025 Revenues	Proposed 2026 Revenues	Proposed 2027 Revenues	% Change 2025	% Change 2026	% Change 2027	Notes
01 Residential Service #1 - 01	26,232,805	27,576,506	28,973,167	30,455,043	5.1%	5.1%	5.1%	
07 Residential Service #1 - 07 (Energy Efficient)	3,174,102	3,331,615	3,496,759	3,670,060	5.0%	5.0%	5.0%	
40 Residential Service 40 (A/C Control)	786	825	866	909	5.0%	5.0%	5.0%	
50 Residential Service 50 (Energy Eff A/C Control)	4,303	4,519	4,744	4,980	5.0%	5.0%	5.0%	
03 Small GS #1 - 03	2,879,533	3,025,859	3,178,898	3,342,029	5.1%	5.1%	5.1%	
04 Small GS #2 - 04	3,235,337	3,397,495	3,570,457	3,752,221	5.0%	5.1%	5.1%	
08 Medium GS #1 - 08	4,413,029	4,633,348	4,865,811	5,109,827	5.0%	5.0%	5.0%	
10 Medium GS #2 - 10	4,934,510	5,182,536	5,442,281	5,715,810	5.0%	5.0%	5.0%	
11 Medium GS - 11 (TOU)	-	-	-	-	0.0%	0.0%	0.0%	Should discontinue rate, no customers on rate, should be CP rate
12 Medium GS - 12 (CP)	2,058,563	2,161,204	2,269,208	2,382,387	5.0%	5.0%	5.0%	
13 Large GS #1 - 13 (CP)	1,310,635	1,377,165	1,445,884	1,517,999	5.1%	5.0%	5.0%	Should discontinue rate, Rate seems off due to First 3200 kW, should be ALL. Coincident-Peak like Large GS #1 - 13
06 Large GS #2 - 06 (CP)	1,245,574	1,307,273	1,372,348	1,441,034	5.0%	5.0%	5.0%	Should discontinue rate, Rate seems off for a true wholesale rate, should be closer to Coincident-Peak like Large GS #1 - 13
EDR5 Economic Dev CP Rate (Large GS)	-	-	-	-	0.0%	0.0%	0.0%	No customers on rate
09 Small Wholesale Customer Rate - 09	1,882	1,980	2,086	2,197	5.2%	5.3%	5.3%	Should discontinue rate, Rate seems off for a true wholesale rate, should be closer to Coincident-Peak like Large GS #1 - 13
70 Extra Facilities Charges Generation - 70	227,088	227,088	227,088	227,088	0.0%	0.0%	0.0%	Assumed constant
Area and streeting lighting in total	1,537,114	1,660,832	1,743,845	1,831,813	8.0%	5.0%	5.0%	Unmetered rates, 2025 higher than 5% due to additional lamps, only 5% per year applied to actual rates
LPDS C/I Load Profile Data Service	701	736	773	812	5.0%	5.0%	5.0%	Applied 5% annual target increase
E14 Commercial EV Charging Station (CP)	60,776	67,079	71,080	75,123	10.4%	6.0%	5.7%	2025 shows higher % due to assumed 10-20% load factor, rates vary by customer actual load factor
E15 Utility Owned EV Charging (CP)	13,693	14,297	15,102	15,908	4.4%	5.6%	5.3%	Applied 5% annual target increase
60 Renewable Resource Facilities Credit	(5,705)	(5,705)	(5,705)	(5,705)	0.0%	0.0%	0.0%	Assumed constant
Total	51,324,726	53,964,652	56,674,692	59,539,534	5.1%	5.0%	5.1%	

Monthly Adder from Single Phase to Three Phase	\$	Percent change	Mround
Year 1 (FY2025)	\$ 13.67	5%	\$ 0.05
Year 2 (FY2026)	\$ 14.35	5%	\$ 0.05
Year 3 (FY2027)	\$ 15.05	5%	\$ 0.05

kWh decimal rounding precision

Rate Code	Description	FY2024 CIS Rate		FY2024 GIS Rate		FY2025		FY2026		FY2027		FY2026		FY2027	
		PER UNIT RATE \$	UFS Rate per Lamp or Item	UFS Year 1 GIS Rate	UFS Year 2 GIS Rate	UFS Year 1 CIS Rate	UFS Year 2 CIS Rate	UFS Year 1 CIS Rate	UFS Year 2 CIS Rate	UFS Year 1 CIS Rate	UFS Year 2 CIS Rate	UFS Year 1 CIS Rate	UFS Year 2 CIS Rate	UFS Year 1 CIS Rate	UFS Year 2 CIS Rate
BWD1	Bernwood Subdivision Street Lights	\$ 3.99	\$ 9.69	\$ 10.15	\$ 10.65	\$ 4.20	\$ 4.40	\$ 4.20	\$ 4.40	\$ 4.40	\$ 4.60	\$ 4.20	\$ 4.40	\$ 4.40	\$ 4.60
CCSL	St.Lt.Colonial Cross, Satterfield,	\$ 4.18	\$ 32.84	\$ 34.50	\$ 32.84	\$ 4.40	\$ 4.60	\$ 4.40	\$ 4.60	\$ 4.40	\$ 4.60	\$ 4.40	\$ 4.60	\$ 4.40	\$ 4.60
CCSL	Croatan Woods,Croatan Crossing St L	\$ 4.18	\$ 22.07	\$ 23.15	\$ 24.30	\$ 4.40	\$ 4.60	\$ 4.40	\$ 4.60	\$ 4.40	\$ 4.60	\$ 4.40	\$ 4.60	\$ 4.40	\$ 4.60
DERU	Deer Run Streetlights	\$ 3.99	\$ 23.02	\$ 24.15	\$ 25.35	\$ 4.20	\$ 4.40	\$ 4.20	\$ 4.40	\$ 4.20	\$ 4.40	\$ 4.20	\$ 4.40	\$ 4.20	\$ 4.40
HPL1	Home Place Street Lights	\$ 4.18	\$ 16.72	\$ 17.55	\$ 18.45	\$ 4.40	\$ 4.60	\$ 4.40	\$ 4.60	\$ 4.40	\$ 4.60	\$ 4.40	\$ 4.60	\$ 4.40	\$ 4.60
LED1	50W LED	\$ 18.74	\$ 18.74	\$ 19.70	\$ 20.70	\$ 19.70	\$ 20.70	\$ 19.70	\$ 20.70	\$ 19.70	\$ 20.70	\$ 19.70	\$ 20.70	\$ 19.70	\$ 20.70
LED2	300W LED	\$ 33.15	\$ 33.15	\$ 34.80	\$ 36.55	\$ 34.80	\$ 36.55	\$ 34.80	\$ 36.55	\$ 34.80	\$ 36.55	\$ 34.80	\$ 36.55	\$ 34.80	\$ 36.55
LED3	70W LED	\$ 12.46	\$ 12.46	\$ 13.10	\$ 13.75	\$ 13.10	\$ 13.75	\$ 13.10	\$ 13.75	\$ 13.10	\$ 13.75	\$ 13.10	\$ 13.75	\$ 13.10	\$ 13.75
LED4	39W Acorn LED	\$ 18.81	\$ 18.81	\$ 19.75	\$ 20.75	\$ 19.75	\$ 20.75	\$ 19.75	\$ 20.75	\$ 19.75	\$ 20.75	\$ 19.75	\$ 20.75	\$ 19.75	\$ 20.75
LED5	110W Town & Country LED	\$ 17.62	\$ 17.62	\$ 18.50	\$ 19.45	\$ 18.50	\$ 19.45	\$ 18.50	\$ 19.45	\$ 18.50	\$ 19.45	\$ 18.50	\$ 19.45	\$ 18.50	\$ 19.45
LED6	160W Gardco LED	\$ 38.85	\$ 38.85	\$ 40.80	\$ 42.85	\$ 40.80	\$ 42.85	\$ 40.80	\$ 42.85	\$ 40.80	\$ 42.85	\$ 40.80	\$ 42.85	\$ 40.80	\$ 42.85
LRSL	Lindenrain Subdivision Street Light	\$ 7.98	\$ 28.80	\$ 30.25	\$ 31.75	\$ 8.40	\$ 8.80	\$ 8.40	\$ 8.80	\$ 8.40	\$ 8.80	\$ 8.40	\$ 8.80	\$ 8.40	\$ 8.80
M10F	Mercury Vapor 1000 Flood	\$ 44.60	\$ 44.60	\$ 46.85	\$ 49.20	\$ 46.85	\$ 49.20	\$ 46.85	\$ 49.20	\$ 46.85	\$ 49.20	\$ 46.85	\$ 49.20	\$ 46.85	\$ 49.20
M17C	Mercury Vapor 175 Enclosed City	\$ 11.90	\$ 11.90	\$ 12.50	\$ 13.15	\$ 12.50	\$ 13.15	\$ 12.50	\$ 13.15	\$ 12.50	\$ 13.15	\$ 12.50	\$ 13.15	\$ 12.50	\$ 13.15
M17E	Mercury Vapor 175 Enclosed	\$ 13.27	\$ 13.27	\$ 13.95	\$ 14.65	\$ 13.95	\$ 14.65	\$ 13.95	\$ 14.65	\$ 13.95	\$ 14.65	\$ 13.95	\$ 14.65	\$ 13.95	\$ 14.65
M17N	Mercury Vapor 175 NB	\$ 8.44	\$ 8.44	\$ 8.85	\$ 9.30	\$ 8.85	\$ 9.30	\$ 8.85	\$ 9.30	\$ 8.85	\$ 9.30	\$ 8.85	\$ 9.30	\$ 8.85	\$ 9.30
M17S	Mercury Vapor 175 Semi-Enclosed	\$ 11.40	\$ 11.40	\$ 11.95	\$ 12.55	\$ 11.95	\$ 12.55	\$ 11.95	\$ 12.55	\$ 11.95	\$ 12.55	\$ 11.95	\$ 12.55	\$ 11.95	\$ 12.55
MH1K	Metal Halide 1000W Flood	\$ 44.60	\$ 44.60	\$ 46.85	\$ 49.20	\$ 46.85	\$ 49.20	\$ 46.85	\$ 49.20	\$ 46.85	\$ 49.20	\$ 46.85	\$ 49.20	\$ 46.85	\$ 49.20
MH1N	Metal Halide 1000W City	\$ 14.47	\$ 14.47	\$ 15.20	\$ 15.95	\$ 15.20	\$ 15.95	\$ 15.20	\$ 15.95	\$ 15.20	\$ 15.95	\$ 15.20	\$ 15.95	\$ 15.20	\$ 15.95
MH4N	Metal Halide 400w decorative city	\$ 13.18	\$ 13.18	\$ 13.85	\$ 14.55	\$ 13.85	\$ 14.55	\$ 13.85	\$ 14.55	\$ 13.85	\$ 14.55	\$ 13.85	\$ 14.55	\$ 13.85	\$ 14.55
MH50	Metal Halide 400W Flood Light	\$ 33.15	\$ 33.15	\$ 34.80	\$ 36.55	\$ 34.80	\$ 36.55	\$ 34.80	\$ 36.55	\$ 34.80	\$ 36.55	\$ 34.80	\$ 36.55	\$ 34.80	\$ 36.55
NEHB	Neuse Harbour Streetlights	\$ 3.99	\$ 17.81	\$ 18.70	\$ 19.65	\$ 4.20	\$ 4.40	\$ 4.20	\$ 4.40	\$ 4.20	\$ 4.40	\$ 4.20	\$ 4.40	\$ 4.20	\$ 4.40
OAK1	OakView Subdivision Street Lights	\$ 2.38	\$ 17.92	\$ 18.80	\$ 19.75	\$ 18.80	\$ 19.75	\$ 18.80	\$ 19.75	\$ 18.80	\$ 19.75	\$ 18.80	\$ 19.75	\$ 18.80	\$ 19.75
RBL1	Rivertrace-RBluff-Crooked-Crkwo	\$ 4.18	\$ 31.83	\$ 33.40	\$ 35.05	\$ 35.05	\$ 36.80	\$ 35.05	\$ 36.80	\$ 35.05	\$ 36.80	\$ 35.05	\$ 36.80	\$ 35.05	\$ 36.80
RS1S	150 Watt Sodium (MV Unit)	\$ 17.09	\$ 17.09	\$ 17.95	\$ 18.85	\$ 17.95	\$ 18.85	\$ 17.95	\$ 18.85	\$ 17.95	\$ 18.85	\$ 17.95	\$ 18.85	\$ 17.95	\$ 18.85
S10C	High Pressure Sodium 100 City	\$ 11.74	\$ 11.74	\$ 12.35	\$ 12.95	\$ 12.35	\$ 12.95	\$ 12.35	\$ 12.95	\$ 12.35	\$ 12.95	\$ 12.35	\$ 12.95	\$ 12.35	\$ 12.95
S10E	High Pressure Sodium 100 Enclosed	\$ 15.12	\$ 15.12	\$ 15.90	\$ 16.70	\$ 15.90	\$ 16.70	\$ 15.90	\$ 16.70	\$ 15.90	\$ 16.70	\$ 15.90	\$ 16.70	\$ 15.90	\$ 16.70
S10N	High Pressure Sodium 100 NB	\$ 7.79	\$ 7.79	\$ 8.20	\$ 8.60	\$ 8.20	\$ 8.60	\$ 8.20	\$ 8.60	\$ 8.20	\$ 8.60	\$ 8.20	\$ 8.60	\$ 8.20	\$ 8.60
S15C	High Pressure Sodium 150 City	\$ 16.68	\$ 16.68	\$ 17.50	\$ 18.40	\$ 17.50	\$ 18.40	\$ 17.50	\$ 18.40	\$ 17.50	\$ 18.40	\$ 17.50	\$ 18.40	\$ 17.50	\$ 18.40
S15E	High Pressure Sodium 150 Enclosed	\$ 18.74	\$ 18.74	\$ 19.70	\$ 20.70	\$ 19.70	\$ 20.70	\$ 19.70	\$ 20.70	\$ 19.70	\$ 20.70	\$ 19.70	\$ 20.70	\$ 19.70	\$ 20.70
S15N	High Pressure Sodium 150 NB	\$ 8.44	\$ 8.44	\$ 8.85	\$ 9.30	\$ 8.85	\$ 9.30	\$ 8.85	\$ 9.30	\$ 8.85	\$ 9.30	\$ 8.85	\$ 9.30	\$ 8.85	\$ 9.30
S25E	High Pressure Sodium 250 Enclosed	\$ 21.32	\$ 21.32	\$ 22.40	\$ 23.50	\$ 22.40	\$ 23.50	\$ 22.40	\$ 23.50	\$ 22.40	\$ 23.50	\$ 22.40	\$ 23.50	\$ 22.40	\$ 23.50
S25N	High Pressure Sodium 250 NB	\$ 10.77	\$ 10.77	\$ 11.30	\$ 11.85	\$ 11.30	\$ 11.85	\$ 11.30	\$ 11.85	\$ 11.30	\$ 11.85	\$ 11.30	\$ 11.85	\$ 11.30	\$ 11.85
S40F	High Pressure Sodium 400 Flood	\$ 33.15	\$ 33.15	\$ 34.80	\$ 36.55	\$ 34.80	\$ 36.55	\$ 34.80	\$ 36.55	\$ 34.80	\$ 36.55	\$ 34.80	\$ 36.55	\$ 34.80	\$ 36.55
S40N	High Pressure Sodium 400 NB	\$ 13.18	\$ 13.18	\$ 13.85	\$ 14.55	\$ 13.85	\$ 14.55	\$ 13.85	\$ 14.55	\$ 13.85	\$ 14.55	\$ 13.85	\$ 14.55	\$ 13.85	\$ 14.55
SPAP	Special Aluminum Pole	\$ 3.51	\$ 3.51	\$ 3.70	\$ 3.90	\$ 3.70	\$ 3.90	\$ 3.70	\$ 3.90	\$ 3.70	\$ 3.90	\$ 3.70	\$ 3.90	\$ 3.70	\$ 3.90
SPMP	Special Metal Post or Pole	\$ 6.94	\$ 6.94	\$ 7.30	\$ 7.65	\$ 7.30	\$ 7.65	\$ 7.30	\$ 7.65	\$ 7.30	\$ 7.65	\$ 7.30	\$ 7.65	\$ 7.30	\$ 7.65
SPWC	Special Wood Pole City Rate	\$ 2.01	\$ 2.01	\$ 2.10	\$ 2.20	\$ 2.10	\$ 2.20	\$ 2.10	\$ 2.20	\$ 2.10	\$ 2.20	\$ 2.10	\$ 2.20	\$ 2.10	\$ 2.20
SPWD	Special Wood Pole	\$ 2.93	\$ 2.93	\$ 3.10	\$ 3.25	\$ 3.10	\$ 3.25	\$ 3.10	\$ 3.25	\$ 3.10	\$ 3.25	\$ 3.10	\$ 3.25	\$ 3.10	\$ 3.25
TEHP	Tax Exempt High Pressure Sodium 400	\$ 33.15	\$ 33.15	\$ 34.80	\$ 36.55	\$ 34.80	\$ 36.55	\$ 34.80	\$ 36.55	\$ 34.80	\$ 36.55	\$ 34.80	\$ 36.55	\$ 34.80	\$ 36.55
TEMV	Tax Exempt Mercury Vapor 175 Watt	\$ 11.40	\$ 11.40	\$ 11.95	\$ 12.55	\$ 11.95	\$ 12.55	\$ 11.95	\$ 12.55	\$ 11.95	\$ 12.55	\$ 11.95	\$ 12.55	\$ 11.95	\$ 12.55
TESV	Tax Exempt 150 Sodium Vapor	\$ 16.68	\$ 16.68	\$ 17.50	\$ 18.40	\$ 17.50	\$ 18.40	\$ 17.50	\$ 18.40	\$ 17.50	\$ 18.40	\$ 17.50	\$ 18.40	\$ 17.50	\$ 18.40
TEWP	Tax Exempt Special Wood Pole	\$ 2.93	\$ 2.93	\$ 3.10	\$ 3.25	\$ 3.10	\$ 3.25	\$ 3.10	\$ 3.25	\$ 3.10	\$ 3.25	\$ 3.10	\$ 3.25	\$ 3.10	\$ 3.25
UG	Underground Service Charge	\$ 4.90	\$ 4.90	\$ 5.15	\$ 5.40	\$ 5.15	\$ 5.40	\$ 5.15	\$ 5.40	\$ 5.15	\$ 5.40	\$ 5.15	\$ 5.40	\$ 5.15	\$ 5.40
UGRD	Underground Charge	\$ 4.90	\$ 4.90	\$ 5.15	\$ 5.40	\$ 5.15	\$ 5.40	\$ 5.15	\$ 5.40	\$ 5.15	\$ 5.40	\$ 5.15	\$ 5.40	\$ 5.15	\$ 5.40
WAVY	Wavy Meadows Street Lights	\$ 2.38	\$ 23.80	\$ 25.00	\$ 26.25	\$ 25.00	\$ 26.25	\$ 25.00	\$ 26.25	\$ 25.00	\$ 26.25	\$ 25.00	\$ 26.25	\$ 25.00	\$ 26.25

New Bern, NC

2025 Rate Design

01

Residential Service #1 - 01

Current Rate

Single Phase
 Three Phase
 Load Mgmt Credit

Customer Charge	kWh's First 300	kWh's Additional
\$ 9.95	\$ 0.1018	\$ 0.1175
\$ 23.62		

Proposed Rate

Single Phase
 Three Phase
 Load Mgmt Credit

Customer Charge	kWh's First 300	kWh's Additional
\$ 12.00	\$ 0.1060	\$ 0.1217
\$ 26.35		

Estimated Change in Revenues

Current Revenues	\$ 26,232,805
Proposed Revenues	27,576,506
Percentage Change	5.1%

New Bern, NC

2026 Rate Design

01

Residential Service #1 - 01

Current Rate

Single Phase
 Three Phase
 Load Mgmt Credit

Customer Charge	kWh's First 300	kWh's Additional
\$ 12.00	\$ 0.1060	\$ 0.1217
\$ 26.35		

Proposed Rate

Single Phase
 Three Phase
 Load Mgmt Credit

Customer Charge	kWh's First 300	kWh's Additional
\$ 14.00	\$ 0.1105	\$ 0.1262
\$ 29.05		

Estimated Change in Revenues

Current Revenues	\$ 27,576,506
Proposed Revenues	28,973,167
Percentage Change	5.1%

New Bern, NC

2027 Rate Design

01

Residential Service #1 - 01

Current Rate

Single Phase
 Three Phase
 Load Mgmt Credit

Customer Charge	kWh's First 300	kWh's Additional
\$ 14.00	\$ 0.1105	\$ 0.1262
\$ 29.05		

Proposed Rate

Single Phase
 Three Phase
 Load Mgmt Credit

Customer Charge	kWh's First 300	kWh's Additional
\$ 16.00	\$ 0.1154	\$ 0.1311
\$ 31.80		

Estimated Change in Revenues

Current Revenues	\$ 28,973,167
Proposed Revenues	30,455,043
Percentage Change	5.1%

New Bern, NC
2025 Rate Design

Discounted Residential 01 kWh by 5%

07

Residential Service #1 - 07 (Energy Efficient)
 (Energy Efficient Residential Rate)

Current Rate

Single Phase
 Three Phase

Customer Charge	kWh's First 300	kWh's Additional
\$ 9.95	\$ 0.0968	\$ 0.1116
\$ 23.62		

Proposed Rate

Single Phase
 Three Phase

Customer Charge	kWh's First 300	kWh's Additional
\$ 12.00	\$ 0.1007	\$ 0.1156
\$ 26.35		

Estimated Change in Revenues

Current Revenues	\$ 3,174,102
Proposed Revenues	3,331,615
Percentage Change	5.0%

New Bern, NC

Discounted Residential 01 kWh by 5%

2026 Rate Design

07

Residential Service #1 - 07 (Energy Efficient)

(Energy Efficient Residential Rate)

Current Rate

Single Phase

Three Phase

Customer Charge	kWh's First 300	kWh's Additional
\$ 12.00	\$ 0.1007	\$ 0.1156
\$ 26.35		

Proposed Rate

Single Phase

Three Phase

Customer Charge	kWh's First 300	kWh's Additional
\$ 14.00	\$ 0.1050	\$ 0.1199
\$ 29.05		

Estimated Change in Revenues

Current Revenues

\$ 3,331,615

Proposed Revenues

3,496,759

Percentage Change

5.0%

New Bern, NC
2027 Rate Design

Discounted Residential 01 kWh by 5%

07

Residential Service #1 - 07 (Energy Efficient)
 (Energy Efficient Residential Rate)

Current Rate

Single Phase
 Three Phase

Customer Charge	kWh's First 300	kWh's Additional
\$ 14.00	\$ 0.1050	\$ 0.1199
\$ 29.05		

Proposed Rate

Single Phase
 Three Phase

Customer Charge	kWh's First 300	kWh's Additional
\$ 16.00	\$ 0.1096	\$ 0.1245
\$ 31.80		

Estimated Change in Revenues

Current Revenues	\$ 3,496,759
Proposed Revenues	3,670,060
Percentage Change	5.0%

New Bern, NC

2025 Rate Design

40

Residential Service 40 (A/C Control)

Current Rate

Single Phase

Three Phase

Proposed Rate

Single Phase

Three Phase

Customer Charge	kWh's First 300	kWh's Next 500	kWh's Additional
\$ 9.95	\$ 0.1018	\$ 0.1175	\$ 0.1013
\$ 23.62			

Customer Charge	kWh's First 300	kWh's Next 500	kWh's Additional
\$ 12.00	\$ 0.1060	\$ 0.1217	\$ 0.1026
\$ 26.35			

Estimated Change in Revenues

Current Revenues

\$ 786

Proposed Revenues

825

Percentage Change

5.0%

New Bern, NC

2026 Rate Design

40

Residential Service 40 (A/C Control)

Current Rate

Single Phase
Three Phase

Customer Charge	kWh's First 300	kWh's Next 500	kWh's Additional
\$ 12.00	\$ 0.1060	\$ 0.1217	\$ 0.1026
\$ 26.35			

Proposed Rate

Single Phase
Three Phase

Customer Charge	kWh's First 300	kWh's Next 500	kWh's Additional
\$ 14.00	\$ 0.1105	\$ 0.1262	\$ 0.1044
\$ 29.05			

Estimated Change in Revenues

Current Revenues	\$	825
Proposed Revenues		866
Percentage Change		5.0%

New Bern, NC

2027 Rate Design

40

Residential Service 40 (A/C Control)

Current Rate

Single Phase
Three Phase

Customer Charge	kWh's First 300	kWh's Next 500	kWh's Additional
\$ 14.00	\$ 0.1105	\$ 0.1262	\$ 0.1044
\$ 29.05			

Proposed Rate

Single Phase
Three Phase

Customer Charge	kWh's First 300	kWh's Next 500	kWh's Additional
\$ 16.00	\$ 0.1154	\$ 0.1311	\$ 0.1065
\$ 31.80			

Estimated Change in Revenues

Current Revenues	\$	866
Proposed Revenues		909
Percentage Change		5.0%

New Bern, NC

2025 Rate Design

50

Residential Service 50 (Energy Eff A/C Control)
 (Energy Efficient Residential Rate)

Current Rate

Single Phase
 Three Phase

Customer Charge	kWh's First 300	kWh's Next 500	kWh's Additional
\$ 9.95	\$ 0.0968	\$ 0.1116	\$ 0.0948
\$ 23.62			

Proposed Rate

Single Phase
 Three Phase

Customer Charge	kWh's First 300	kWh's Next 500	kWh's Additional
\$ 12.00	\$ 0.1007	\$ 0.1156	\$ 0.0940
\$ 26.35			

Estimated Change in Revenues

Current Revenues	\$	4,303
Proposed Revenues		4,519
Percentage Change		5.0%

New Bern, NC

2026 Rate Design

50

Residential Service 50 (Energy Eff A/C Control)

(Energy Efficient Residential Rate)

Current Rate

Single Phase

Three Phase

Customer Charge	kWh's First 300	kWh's Next 500	kWh's Additional
\$ 12.00	\$ 0.1007	\$ 0.1156	\$ 0.0940
\$ 26.35			

Proposed Rate

Single Phase

Three Phase

Customer Charge	kWh's First 300	kWh's Next 500	kWh's Additional
\$ 14.00	\$ 0.1050	\$ 0.1199	\$ 0.0936
\$ 29.05			

Estimated Change in Revenues

Current Revenues

Proposed Revenues

Percentage Change

\$	4,519
	4,744
	5.0%

New Bern, NC

2027 Rate Design

50

Residential Service 50 (Energy Eff A/C Control)

(Energy Efficient Residential Rate)

Current Rate

Single Phase

Three Phase

Customer Charge	kWh's First 300	kWh's Next 500	kWh's Additional
\$ 14.00	\$ 0.1050	\$ 0.1199	\$ 0.0936
\$ 29.05			

Proposed Rate

Single Phase

Three Phase

Customer Charge	kWh's First 300	kWh's Next 500	kWh's Additional
\$ 16.00	\$ 0.1096	\$ 0.1245	\$ 0.0935
\$ 31.80			

Estimated Change in Revenues

Current Revenues

Proposed Revenues

Percentage Change

\$ 4,744
4,980
5.0%

New Bern, NC

2025 Rate Design

03

Small GS #1 - 03

Current Rate

Single Phase

Three Phase

Customer Charge	kWh's First 2325	kWh's Next 1000	kWh's Over 3325
\$ 20.64	\$ 0.1260	\$ 0.0960	\$ 0.0900
\$ 34.31			

Proposed Rate

Single Phase

Three Phase

Customer Charge	kWh's First 2325	kWh's Next 1000	kWh's Over 3325
\$ 25.00	\$ 0.1264	\$ 0.1010	\$ 0.0900
\$ 39.35			

Estimated Change in Revenues

Current Revenues

\$ 2,879,533

Proposed Revenues

3,025,859

Percentage Change

5.1%

New Bern, NC

2026 Rate Design

03

Small GS #1 - 03

Current Rate

Single Phase

Three Phase

Customer Charge	kWh's First 2325	kWh's Next 1000	kWh's Over 3325
\$ 25.00	\$ 0.1264	\$ 0.1010	\$ 0.0900
\$ 39.35			

Proposed Rate

Single Phase

Three Phase

Customer Charge	kWh's First 2325	kWh's Next 1000	kWh's Over 3325
\$ 29.50	\$ 0.1268	\$ 0.1060	\$ 0.0920
\$ 44.55			

Estimated Change in Revenues

Current Revenues

\$ 3,025,859

Proposed Revenues

3,178,898

Percentage Change

5.1%

New Bern, NC

2027 Rate Design

03

Small GS #1 - 03

Current Rate

Single Phase

Three Phase

Customer Charge	kWh's First 2325	kWh's Next 1000	kWh's Over 3325
\$ 29.50	\$ 0.1268	\$ 0.1060	\$ 0.0920
\$ 44.55			

Proposed Rate

Single Phase

Three Phase

Customer Charge	kWh's First 2325	kWh's Next 1000	kWh's Over 3325
\$ 34.00	\$ 0.1275	\$ 0.1120	\$ 0.0980
\$ 49.80			

Estimated Change in Revenues

Current Revenues

\$ 3,178,898

Proposed Revenues

3,342,029

Percentage Change

5.1%

New Bern, NC

2025 Rate Design

04

Small GS #2 - 04

Current Rate

Single Phase
Three Phase

Customer Charge	Demand Charge	First 2325 kWh	Next 1000 kWh	All Over 3325 kWh
\$ 20.64	\$ 2.31	\$ 0.1013	\$ 0.0956	\$ 0.0887
\$ 34.31				

Proposed Rate

Single Phase
Three Phase

Customer Charge	Demand Charge	First 2325 kWh	Next 1000 kWh	All Over 3325 kWh
\$ 25.00	\$ 3.00	\$ 0.1030	\$ 0.0973	\$ 0.0904
\$ 39.35				

Estimated Change in Revenues

Current Revenues	\$ 3,235,337
Proposed Revenues	3,397,495
Percentage Change	5.0%

New Bern, NC

2026 Rate Design

04

Small GS #2 - 04

Current Rate

Single Phase
Three Phase

Customer Charge	Demand Charge	First 2325 kWh	Next 1000 kWh	All Over 3325 kWh
\$ 25.00	\$ 3.00	\$ 0.1030	\$ 0.0973	\$ 0.0904
\$ 39.35				

Proposed Rate

Single Phase
Three Phase

Customer Charge	Demand Charge	First 2325 kWh	Next 1000 kWh	All Over 3325 kWh
\$ 29.50	\$ 3.75	\$ 0.1048	\$ 0.0991	\$ 0.0922
\$ 44.55				

Estimated Change in Revenues

Current Revenues	\$ 3,397,495
Proposed Revenues	3,570,457
Percentage Change	5.1%

New Bern, NC

2027 Rate Design

04

Small GS #2 - 04

Current Rate

Single Phase
Three Phase

Customer Charge	Demand Charge	First 2325 kWh	Next 1000 kWh	All Over 3325 kWh
\$ 29.50	\$ 3.75	\$ 0.1048	\$ 0.0991	\$ 0.0922
\$ 44.55				

Proposed Rate

Single Phase
Three Phase

Customer Charge	Demand Charge	First 2325 kWh	Next 1000 kWh	All Over 3325 kWh
\$ 34.00	\$ 4.50	\$ 0.1069	\$ 0.1012	\$ 0.0943
\$ 49.80				

Estimated Change in Revenues

Current Revenues	\$ 3,570,457
Proposed Revenues	3,752,221
Percentage Change	5.1%

New Bern, NC
2025 Rate Design
08
Medium GS #1 - 08

Current Rate

Single Phase
 Three Phase

Customer Charge	Demand Charge	Energy Charge
\$ 22.80	\$ 8.08	\$ 0.0842
\$ 36.47		

Proposed Rate

Single Phase
 Three Phase

Customer Charge	Demand Charge	Energy Charge
\$ 27.00	\$ 9.00	\$ 0.0863
\$ 41.35		

Estimated Change in Revenues

Current Revenues	\$ 4,413,029
Proposed Revenues	4,633,348
Percentage Change	5.0%

New Bern, NC
2026 Rate Design
08
Medium GS #1 - 08

Current Rate

Single Phase
 Three Phase

Customer Charge	Demand Charge	Energy Charge
\$ 27.00	\$ 9.00	\$ 0.0863
\$ 41.35		

Proposed Rate

Single Phase
 Three Phase

Customer Charge	Demand Charge	Energy Charge
\$ 31.50	\$ 9.75	\$ 0.0893
\$ 46.55		

Estimated Change in Revenues

Current Revenues	\$ 4,633,348
Proposed Revenues	4,865,811
Percentage Change	5.0%

New Bern, NC
2027 Rate Design
08
Medium GS #1 - 08

Current Rate

Single Phase
 Three Phase

Customer Charge	Demand Charge	Energy Charge
\$ 31.50	\$ 9.75	\$ 0.0893
\$ 46.55		

Proposed Rate

Single Phase
 Three Phase

Customer Charge	Demand Charge	Energy Charge
\$ 36.00	\$ 10.50	\$ 0.0926
\$ 51.80		

Estimated Change in Revenues

Current Revenues	\$ 4,865,811
Proposed Revenues	5,109,827
Percentage Change	5.0%

New Bern, NC

2025 Rate Design

10

Medium GS #2 - 10

Current Rate

Single Phase

Three Phase

Customer Charge	Demand Charge	Energy Charge
\$ 22.80	\$ 8.95	\$ 0.0800
\$ 36.47		

Proposed Rate

Single Phase

Three Phase

Customer Charge	Demand Charge	Energy Charge
\$ 27.00	\$ 9.75	\$ 0.0829
\$ 41.35		

Estimated Change in Revenues

Current Revenues

\$ 4,934,510

Proposed Revenues

5,182,536

Percentage Change

5.0%

New Bern, NC

2026 Rate Design

10

Medium GS #2 - 10

Current Rate

Single Phase
Three Phase

Customer Charge	Demand Charge	Energy Charge
\$ 27.00	\$ 9.75	\$ 0.0829
\$ 41.35		

Proposed Rate

Single Phase
Three Phase

Customer Charge	Demand Charge	Energy Charge
\$ 31.50	\$ 10.50	\$ 0.0862
\$ 46.55		

Estimated Change in Revenues

Current Revenues	\$ 5,182,536
Proposed Revenues	5,442,281
Percentage Change	5.0%

New Bern, NC
2027 Rate Design
 10
 Medium GS #2 - 10

Current Rate

Single Phase
 Three Phase

Customer Charge	Demand Charge	Energy Charge
\$ 31.50	\$ 10.50	\$ 0.0862
\$ 46.55		

Proposed Rate

Single Phase
 Three Phase

Customer Charge	Demand Charge	Energy Charge
\$ 36.00	\$ 11.25	\$ 0.0898
\$ 51.80		

Estimated Change in Revenues

Current Revenues	\$ 5,442,281
Proposed Revenues	5,715,810
Percentage Change	5.0%

New Bern, NC
2025 Rate Design
11

Should discontinue, no customers on rate, Rate seems off due to ON-Peak Demand, should be Coincident-Peak like Large GS #1 - 13, per Chris, 4/5/2024

Medium GS - 11 (TOU)

Current Rate

	Customer Charge	Demand Charge	Energy Charge
On-Peak Demand	\$ 56.78	\$ 21.57	\$ 0.0592
Excess Demand		\$ 5.19	

Proposed Rate

	Customer Charge	Demand Charge	Energy Charge
On-Peak Demand	\$ 60.00	\$ 27.00	\$ 0.0606
Excess Demand		\$ 6.00	

New Bern, NC
2026 Rate Design
 11

Should discontinue, no customers on rate, Rate seems off due to ON-Peak Demand, should be Coincident-Peak like Large GS #1 - 13, per Chris, 4/5/2024

Medium GS - 11 (TOU)

Current Rate

	Customer Charge	Demand Charge	Energy Charge
On-Peak Demand	\$ 60.00	\$ 27.00	\$ 0.0606
Excess Demand		\$ 6.00	

Proposed Rate

	Customer Charge	Demand Charge	Energy Charge
On-Peak Demand	\$ 63.00	\$ 27.75	\$ 0.0630
Excess Demand		\$ 6.75	

New Bern, NC
2027 Rate Design
 11

Medium GS - 11 (TOU)

Should discontinue, no customers on rate, Rate seems off due to ON-Peak Demand, should be Coincident-Peak like Large GS #1 - 13, per Chris, 4/5/2024

Current Rate

	Customer Charge	Demand Charge	Energy Charge
On-Peak Demand	\$ 63.00	\$ 27.75	\$ 0.0630
Excess Demand		\$ 6.75	

Proposed Rate

	Customer Charge	Demand Charge	Energy Charge
On-Peak Demand	\$ 66.00	\$ 28.50	\$ 0.0655
Excess Demand		\$ 7.50	

New Bern, NC
2025 Rate Design
 12
 Medium GS - 12 (CP)

Current Rate

Coincident Peak Demand
 Excess Demand

Customer Charge	Demand Charge	Energy Charge
\$ 82.24	\$ 22.12	\$ 0.0601
	\$ 5.24	

Proposed Rate

Coincident Peak Demand
 Excess Demand

Customer Charge	Demand Charge	Energy Charge
\$ 90.00	\$ 27.00	\$ 0.0607
	\$ 6.00	

Estimated Change in Revenues

Current Revenues	\$ 2,058,563
Proposed Revenues	2,161,204
Percentage Change	5.0%

New Bern, NC
2026 Rate Design
 12
 Medium GS - 12 (CP)

<u>Current Rate</u>	Customer Charge	Demand Charge	Energy Charge
Coincident Peak Demand	\$ 90.00	\$ 27.00	\$ 0.0607
Excess Demand		\$ 6.00	

<u>Proposed Rate</u>	Customer Charge	Demand Charge	Energy Charge
Coincident Peak Demand	\$ 97.50	\$ 27.75	\$ 0.0630
Excess Demand		\$ 6.75	

Estimated Change in Revenues

Current Revenues	\$ 2,161,204
Proposed Revenues	2,269,208
Percentage Change	5.0%

New Bern, NC

2027 Rate Design

12

Medium GS - 12 (CP)

Current Rate

Coincident Peak Demand
Excess Demand

Customer Charge	Demand Charge	Energy Charge
\$ 97.50	\$ 27.75	\$ 0.0630
	\$ 6.75	

Proposed Rate

Coincident Peak Demand
Excess Demand

Customer Charge	Demand Charge	Energy Charge
\$ 105.00	\$ 28.50	\$ 0.0655
	\$ 7.50	

Estimated Change in Revenues

Current Revenues	\$ 2,269,208
Proposed Revenues	2,382,387
Percentage Change	5.0%

New Bern, NC

2025 Rate Design

13

Large GS #1 - 13 (CP)

Current Rate

Coincident Peak Demand
Excess Demand

Customer Charge	Demand Charge	Energy Charge
\$ 166.06	\$ 26.84	\$ 0.0561
	\$ 4.43	

Proposed Rate

Coincident Peak Demand
Excess Demand

Customer Charge	Demand Charge	Energy Charge
\$ 175.00	\$ 27.00	\$ 0.0568
	\$ 6.00	

Estimated Change in Revenues

Current Revenues	\$ 1,310,635
Proposed Revenues	1,377,165
Percentage Change	5.1%

New Bern, NC
2026 Rate Design
 13
 Large GS #1 - 13 (CP)

<u>Current Rate</u>	Customer Charge	Demand Charge	Energy Charge
Coincident Peak Demand	\$ 175.00	\$ 27.00	\$ 0.0568
Excess Demand		\$ 6.00	

<u>Proposed Rate</u>	Customer Charge	Demand Charge	Energy Charge
Coincident Peak Demand	\$ 184.00	\$ 27.75	\$ 0.0590
Excess Demand		\$ 6.75	

Estimated Change in Revenues

Current Revenues	\$ 1,377,165
Proposed Revenues	1,445,884
Percentage Change	5.0%

New Bern, NC

2027 Rate Design

13

Large GS #1 - 13 (CP)

Current Rate

Coincident Peak Demand
Excess Demand

Customer Charge	Demand Charge	Energy Charge
\$ 184.00	\$ 27.75	\$ 0.0590
	\$ 6.75	

Proposed Rate

Coincident Peak Demand
Excess Demand

Customer Charge	Demand Charge	Energy Charge
\$ 193.00	\$ 28.50	\$ 0.0614
	\$ 7.50	

Estimated Change in Revenues

Current Revenues	\$ 1,445,884
Proposed Revenues	1,517,999
Percentage Change	5.0%

New Bern, NC
2025 Rate Design
06

Large GS #2 - 06 (CP)

Should discontinue, Rate seems off due to First 3200 kW, should be ALL Coincident-Peak like Large GS #1 - 13, per Chris, 4/5/2024

Current Rate

Coincident Peak Demand

	Customer Charge	Demand Charge	Energy Charge
First 3200 kW	\$ 1,214.06	\$ 26.84	First 1,700,000 \$ 0.0529
Additional kW		\$ 14.94	Additional kWh \$ 0.0445
Excess Demand		\$ 4.19	

Proposed Rate

Coincident Peak Demand

	Customer Charge	Demand Charge	Energy Charge
First 3200 kW	\$ 1,250.00	\$ 27.00	First 1,700,000 \$ 0.0529
Additional kW		\$ 27.00	Additional kWh \$ 0.0445
Excess Demand		\$ 6.00	

Estimated Change in Revenues

Current Revenues	\$ 1,245,574
Proposed Revenues	1,307,273
Percentage Change	5.0%

New Bern, NC
2026 Rate Design
06

Large GS #2 - 06 (CP)

Should discontinue, Rate seems off due to First 3200 kW, should be ALL Coincident-Peak like Large GS #1 - 13, per Chris, 4/5/2024

Current Rate

Coincident Peak Demand

	Customer Charge	Demand Charge		Energy Charge
First 3200 kW	\$ 1,250.00	\$ 27.00	First 1,700,000	\$ 0.0529
Additional kW		\$ 27.00	Additional kWh	\$ 0.0445
Excess Demand		\$ 6.00		

Proposed Rate

Coincident Peak Demand

	Customer Charge	Demand Charge		Energy Charge
First 3200 kW	\$ 1,285.00	\$ 27.75	First 1,700,000	\$ 0.0543
Additional kW		\$ 27.75	Additional kWh	\$ 0.0543
Excess Demand		\$ 6.75		

Estimated Change in Revenues

Current Revenues	\$ 1,307,273
Proposed Revenues	1,372,348
Percentage Change	5.0%

New Bern, NC
2027 Rate Design
06

Large GS #2 - 06 (CP)

Should discontinue, Rate seems off due to First 3200 kW, should be ALL Coincident-Peak like Large GS #1 - 13, per Chris, 4/5/2024

Current Rate

Coincident Peak Demand

	Customer Charge	Demand Charge	Energy Charge
First 3200 kW	\$ 1,285.00	\$ 27.75	First 1,700,000 \$ 0.0543
Additional kW		\$ 27.75	Additional kWh \$ 0.0543
Excess Demand		\$ 6.75	

Proposed Rate

Coincident Peak Demand

	Customer Charge	Demand Charge	Energy Charge
First 3200 kW	\$ 1,320.00	\$ 28.50	First 1,700,000 \$ 0.0564
Additional kW		\$ 28.50	Additional kWh \$ 0.0564
Excess Demand		\$ 7.50	

Estimated Change in Revenues

Current Revenues	\$ 1,372,348
Proposed Revenues	1,441,034
Percentage Change	5.0%

New Bern, NC

2025 Rate Design

No customers on rate

EDR5

Economic Dev CP Rate (Large GS)

Current Rate

Coincident Peak Demand
Excess Demand

Customer Charge	Demand Charge	Energy Charge
\$ 197.00	\$ 26.84	\$ 0.0444
	\$ 3.94	

Proposed Rate

Coincident Peak Demand
Excess Demand

Customer Charge	Demand Charge	Energy Charge
\$ 205.00	\$ 27.00	\$ 0.0445
	\$ 6.00	

New Bern, NC

2026 Rate Design

No customers on rate

EDR5

Economic Dev CP Rate (Large GS)

Current Rate

Coincident Peak Demand
Excess Demand

Customer Charge	Demand Charge	Energy Charge
\$ 205.00	\$ 27.00	\$ 0.0445
	\$ 6.00	

Proposed Rate

Coincident Peak Demand
Excess Demand

Customer Charge	Demand Charge	Energy Charge
\$ 215.00	\$ 27.75	\$ 0.0480
	\$ 6.75	

New Bern, NC

2027 Rate Design

No customers on rate

EDR5

Economic Dev CP Rate (Large GS)

Current Rate

	Customer Charge	Demand Charge	Energy Charge
Coincident Peak Demand	\$ 215.00	\$ 27.75	\$ 0.0480
Excess Demand		\$ 6.75	

Proposed Rate

	Customer Charge	Demand Charge	Energy Charge
Coincident Peak Demand	\$ 225.00	\$ 28.50	\$ 0.0520
Excess Demand		\$ 7.50	

New Bern, NC

2025 Rate Design

09

Small Wholesale Customer Rate - 09

Should discontinue, Rate seems off for a true wholesale rate, should be closer to Coincident-Peak like Large GS #1 - 13, per Chris, 4/5/2024

Current Rate

Single Phase
Three Phase

Customer Charge	Demand Charge	Energy Charge
\$ 21.78	\$ 6.69	\$ 0.0859
\$ 35.45		

Proposed Rate

Single Phase
Three Phase

Customer Charge	Demand Charge	Energy Charge
\$ 27.00	\$ 7.00	\$ 0.0870
\$ 41.35		

Estimated Change in Revenues

Current Revenues	\$ 1,882
Proposed Revenues	1,980
Percentage Change	5.2%

New Bern, NC

2026 Rate Design

09

Small Wholesale Customer Rate - 09

Should discontinue, Rate seems off for a true wholesale rate, should be closer to Coincident-Peak like Large GS #1 - 13, per Chris, 4/5/2024

Current Rate

Single Phase
Three Phase

Customer Charge	Demand Charge	Energy Charge
\$ 27.00	\$ 7.00	\$ 0.0870
\$ 41.35		

Proposed Rate

Single Phase
Three Phase

Customer Charge	Demand Charge	Energy Charge
\$ 33.00	\$ 7.75	\$ 0.0856
\$ 48.05		

Estimated Change in Revenues

Current Revenues	\$	1,980
Proposed Revenues		2,086
Percentage Change		5.3%

New Bern, NC

2027 Rate Design

09

Small Wholesale Customer Rate - 09

Should discontinue, Rate seems off for a true wholesale rate, should be closer to Coincident-Peak like Large GS #1 - 13, per Chris, 4/5/2024

Current Rate

Single Phase
Three Phase

Customer Charge	Demand Charge	Energy Charge
\$ 33.00	\$ 7.75	\$ 0.0856
\$ 48.05		

Proposed Rate

Single Phase
Three Phase

Customer Charge	Demand Charge	Energy Charge
\$ 39.00	\$ 8.50	\$ 0.0846
\$ 54.80		

Estimated Change in Revenues

Current Revenues	\$	2,086
Proposed Revenues		2,197
Percentage Change		5.3%

New Bern, NC

2025 Rate Design

LPDS

C/I Load Profile Data Service

Applied 5% to current rates

Current Rate

Setup Fee	Day After Fee	Same Day Fee
\$ 150.00	\$ 40.50	\$ 90.00

Proposed Rate

Setup Fee	Day After Fee	Same Day Fee
\$ 157.50	\$ 42.50	\$ 94.50

New Bern, NC

2026 Rate Design

LPDS

C/I Load Profile Data Service

Applied 5%

Current Rate

Setup Fee	Day After Fee	Same Day Fee
\$ 157.50	\$ 42.50	\$ 94.50

Proposed Rate

Setup Fee	Day After Fee	Same Day Fee
\$ 165.40	\$ 44.65	\$ 99.25

New Bern, NC

2027 Rate Design

LPDS

C/I Load Profile Data Service

Applied 5%

Current Rate

Setup Fee	Day After Fee	Same Day Fee
\$ 165.40	\$ 44.65	\$ 99.25

Proposed Rate

Setup Fee	Day After Fee	Same Day Fee
\$ 173.65	\$ 46.90	\$ 104.20

New Bern, NC

2025 Rate Design

E14

Commercial EV Charging Station (CP)

<u>Current Rate</u>	Customer Charge	Demand Charge	Energy Charge (LF<= 10%)	Energy Charge (10%<LF<20)	Energy Charge (LF>20%)
Coincident Peak Demand	\$ 166.06	\$ 26.84	\$ 0.1010	\$ 0.0786	\$ 0.0561
Excess Demand		\$ 4.43			

<u>Proposed Rate</u>	Customer Charge	Demand Charge	Energy Charge (LF<= 10%)	Energy Charge (10%<LF<20)	Energy Charge (LF>20%)
Coincident Peak Demand	\$ 175.00	\$ 27.00	\$ 0.1018	\$ 0.0793	\$ 0.0568
Excess Demand		\$ 6.00			

Estimated Change in Revenues

Current Revenues	\$	60,776
Proposed Revenues		67,079
Percentage Change		10.4% <-depends on LF% from above

New Bern, NC

2026 Rate Design

E14

Commercial EV Charging Station (CP)

<u>Current Rate</u>	Customer Charge	Demand Charge	Energy Charge (LF<= 10%)	Energy Charge (10%<LF<20)	Energy Charge (LF>20%)
Coincident Peak Demand	\$ 175.00	\$ 27.00	\$ 0.1018	\$ 0.0793	\$ 0.0568
Excess Demand		\$ 6.00			

<u>Proposed Rate</u>	Customer Charge	Demand Charge	Energy Charge (LF<= 10%)	Energy Charge (10%<LF<20)	Energy Charge (LF>20%)
Coincident Peak Demand	\$ 184.00	\$ 27.75	\$ 0.1040	\$ 0.0815	\$ 0.0590
Excess Demand		\$ 6.75			

Estimated Change in Revenues

Current Revenues	\$ 67,079
Proposed Revenues	71,080
Percentage Change	6.0% <-depends on LF% from above

New Bern, NC

2027 Rate Design

E14

Commercial EV Charging Station (CP)

	Customer Charge	Demand Charge	Energy Charge (LF<= 10%)	Energy Charge (10%<LF<20)	Energy Charge (LF>20%)
Current Rate					
Coincident Peak Demand	\$ 184.00	\$ 27.75	\$ 0.1040	\$ 0.0815	\$ 0.0590
Excess Demand		\$ 6.75			

	Customer Charge	Demand Charge	Energy Charge (LF<= 10%)	Energy Charge (10%<LF<20)	Energy Charge (LF>20%)
Proposed Rate					
Coincident Peak Demand	\$ 193.00	\$ 28.50	\$ 0.1064	\$ 0.0839	\$ 0.0614
Excess Demand		\$ 7.50			

Estimated Change in Revenues

Current Revenues	\$ 71,080
Proposed Revenues	75,123
Percentage Change	5.7% <-depends on LF% from above

New Bern, NC

2025 Rate Design

E15

Utility Owned EV Charging (CP)

Applied 5% to all rate components

	Customer Charge	Demand Charge	Energy Charge (LF<= 10%)	Energy Charge (10%<LF<20 %)	Energy Charge (LF>20%)	In-Active Charging (per minute)
Current Rate						
Coincident Peak Demand	\$ -	\$ -	\$ 0.6800	\$ 0.4700	\$ 0.3800	\$ 0.1700
Excess Demand		\$ -				

	Customer Charge	Demand Charge	Energy Charge (LF<= 10%)	Energy Charge (10%<LF<20 %)	Energy Charge (LF>20%)	In-Active Charging (per minute)
Proposed Rate						
Coincident Peak Demand	\$ -	\$ -	\$ 0.7100	\$ 0.4900	\$ 0.4000	\$ 0.1800
Excess Demand		\$ -				

Estimated Change in Revenues

Current Revenues	\$ 13,693
Proposed Revenues	14,297
Percentage Change	4.4%

New Bern, NC

2026 Rate Design

E15

Utility Owned EV Charging (CP)

Applied 5% to all rate components

	Customer Charge	Demand Charge	Energy Charge (LF<= 10%)	Energy Charge (10%<LF<20 %)	Energy Charge (LF>20%)	In-Active Charging (per minute)
Current Rate						
Coincident Peak Demand	\$ -	\$ -	\$ 0.7100	\$ 0.4900	\$ 0.4000	\$ 0.1800
Excess Demand		\$ -				

	Customer Charge	Demand Charge	Energy Charge (LF<= 10%)	Energy Charge (10%<LF<20 %)	Energy Charge (LF>20%)	In-Active Charging (per minute)
Proposed Rate						
Coincident Peak Demand	\$ -	\$ -	\$ 0.7500	\$ 0.5100	\$ 0.4200	\$ 0.1900
Excess Demand		\$ -				

Estimated Change in Revenues

Current Revenues	\$ 14,297
Proposed Revenues	15,102
Percentage Change	5.6%

New Bern, NC

2027 Rate Design

E15

Utility Owned EV Charging (CP)

Applied 5% to all rate components

	Customer Charge	Demand Charge	Energy Charge (LF<= 10%)	Energy Charge (10%<LF<20 %)	Energy Charge (LF>20%)	In-Active Charging (per minute)
Current Rate						
Coincident Peak Demand	\$ -	\$ -	\$ 0.7500	\$ 0.5100	\$ 0.4200	\$ 0.1900
Excess Demand		\$ -				

	Customer Charge	Demand Charge	Energy Charge (LF<= 10%)	Energy Charge (10%<LF<20 %)	Energy Charge (LF>20%)	In-Active Charging (per minute)
Proposed Rate						
Coincident Peak Demand	\$ -	\$ -	\$ 0.7900	\$ 0.5400	\$ 0.4400	\$ 0.2000
Excess Demand		\$ -				

Estimated Change in Revenues

Current Revenues	\$ 15,102
Proposed Revenues	15,908
Percentage Change	5.3%

AGENDA ITEM COVER SHEET

Agenda Item Title:

Conduct a Public Hearing on the proposed FY 2024-2028 Five-Year Consolidated Plan, FY 2024 Annual Action Plan, and Analysis of Impediments to Fair Housing Choice (*as one*).

Date of Meeting: 6/25/2024	Ward # if applicable:
Department: Development Services	Person Submitting Item: D'Aja Fulmore, Community Development Coordinator
Call for Public Hearing: <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	Date of Public Hearing: 6/25/2024

Explanation of Item:	The Five-Year Consolidated Plan is designed to help local jurisdictions to assess their affordable housing and community development needs as part of the Community Development Block Grant (CDBG) Program. The Five-Year Consolidated Plan is carried out through Annual Action Plans, which provide a summary of the actions, activities, and the specific federal and non-federal resources that will be used each year to address the priority needs and goals identified by the Five-Year Consolidated Plan. The Analysis of Impediments to Fair Housing Choice (AI) must coincide with the City's Five-Year Consolidated Plan.
Actions Needed by Board:	Conduct Hearing
Backup Attached:	Memo, Presentation
Is item time sensitive? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	

Cost of Agenda Item:
If this requires an expenditure, has it been budgeted and are funds available and certified by the Finance Director? <input type="checkbox"/> Yes <input type="checkbox"/> No

Additional Notes:



MEMORANDUM

TO: Mayor Jeffrey Odham, City of New Bern Board of Aldermen

FROM: D'Aja Fulmore, Community Development Coordinator

DATE: June 14, 2024

SUBJECT: To Conduct a Public Hearing on the draft FY 2024-2028 Five-Year Consolidated Plan, FY 2024 Annual Action Plan, and Analysis of Impediments to Fair Housing Choice.

Background Information:

The purpose of this agenda item is to conduct a public hearing on the draft FY 2024-2028 Five-Year Consolidated Plan, FY 2024 Annual Action Plan, and Analysis of Impediments to Fair Housing Choice.

The Five-Year Consolidated Plan is designed to help local jurisdictions to assess their affordable housing and community development needs and market conditions, and to make data-driven, place-based investment decisions. The five-year consolidated planning process serves as the framework for a community-wide dialogue to identify housing and community development priorities that align and focus funding for the Community Development Block Grant (CDBG) Program. The Five-Year Consolidated Plan is carried out through Annual Action Plans, which provide a summary of the actions, activities, and the specific federal and non-federal resources that will be used each year to address the priority needs and specific goals identified by the Five-Year Consolidated Plan.

The following budget and projects are proposed for the Community Development Block Grant (CDBG) 2024 Annual Action Plan:

- Program Administration, Planning, and Management: \$58,342.00
- Demolition and Clearance: \$65,000.00
- Street and Sidewalk Improvements: \$168,372.00

Total CDBG 2024 Entitlement Allocation: \$291,714

The Analysis of Impediments to Fair Housing Choice focuses on the status and interaction of six (6) fundamental conditions within the local jurisdiction:

- The sale or rental of dwellings (public or private);
- The provision of housing brokerage services;
- The provision of financial assistance for dwellings;
- Public policies and actions affecting the approval of sites and other building requirements used in the approval process for the construction of publicly assisted housing;
- The administrative policies concerning community development and housing activities, which affect opportunities of minority households to select housing inside or outside areas of minority concentration; and
- Where there is a determination of unlawful segregation or other housing discrimination by a court or a finding of noncompliance by HUD regarding assisted housing in a recipient's jurisdiction, an analysis of the actions which could be taken by the recipient to remedy the discriminatory condition, including actions involving the expenditure of funds made available under 24 CFR Part 570.

The Analysis of Impediments to Fair Housing Choice (AI) must coincide with the City's Five-Year Consolidated Plan, and then every five (5) years thereafter. As part of its Annual Action Plan, the City must additionally sign certifications every year stating that the City will affirmatively further fair housing. This means that the City will take appropriate actions to overcome the effects of any impediments identified through the AI and maintain records reflecting the analysis and actions that are needed.

A public hearing is required for the City to submit the plan to the U.S. Department of Housing and Urban Development so that the City can receive its CDBG funds.

Recommendation:

To Conduct a Public Hearing on the proposed FY 2024-2028 Five-Year Consolidated Plan, FY 2024 Annual Action Plan, and Analysis of Impediments to Fair Housing Choice.

If you have any questions or need additional information, please contact D'Aja Fulmore at 252-639-7586.



Community Development Block Grant (CDBG) Five-Year Consolidated Plan, 2024 Annual Action Plan, Analysis of Impediments to Fair Housing

June 25, 2024

1

Overview

- Definition/Purpose
- Timeline of Community Engagement
- Highlights from the Five-Year Consolidated Plan
- Five-Year Priorities and Strategies
- 2024 CDBG Budget and Projects
- Impediments to Fair Housing Choice

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Definition/Purpose

- **Five-Year Consolidated Plan:** Plan designed to help local jurisdictions to assess their affordable housing and community development needs as part of the Community Development Block Grant (CDBG) Program. The Five-Year Consolidated Plan is carried out through Annual Action Plans.
- **Annual Action Plan (AAP):** Concise summary of the actions, activities, and the specific federal and non-federal resources that will be used each year to address the priority needs and specific goals identified by the Consolidated Plan.

Timeline of Community Engagement for Data Collection

- Resident Surveys: Began October 2023 Distribution
- Agency Interviews
- Community Needs Hearing held at Development Services on Monday, February 26, 2024, at 6pm.

Highlights from the Plan

- The largest housing problem in the City of New Bern is housing affordability.
 - Hurricane Florence Impact
- The most immediate needs of Public Housing residents is for employment, training, and transportation.
- The Point In Time Count for Craven County in 2023 counted a total of 43 homeless persons and 38 homeless households.

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Highlights from the Plan (Cont'd.)

- There are 8,279 owner-occupied housing units, 5,903 renter-occupied housing units, and approximately 2,083 vacant units in the City of New Bern.
- Affordable senior housing remains a need.
- The City of New Bern intends to address housing affordability issues with the construction of new affordable housing.

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Six Priorities Identified

- Housing Priority
- Homeless Priority
- Other Special Needs Priority
- Community Development Priority
- Economic Development Priority
- Administration, Planning, and Management Priority

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Housing Priority

Strategy 1: **Homeownership** – Promote & assist low-moderate-income households who wish to become homeowners by providing down payment assistance, closing cost assistance, and requiring housing counseling training.

Strategy 2: **Housing Construction** – Promote and assist in financing the development of affordable housing for both rental and for sales housing.

Strategy 3: **Housing Rehabilitation** – Promote and assist in financing the preservation of existing owner and renter occupied housing stock in the City.

Strategy 4: **Rent and Utility Assistance** – Promote and assist in financing short term rent and utility assistance programs for low-moderate-income persons who are in danger of becoming homeless

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Homeless Priority

- Strategy 1: **Housing** – Promote and assist in developing housing opportunities for homeless persons and households, and those who may be at-risk of becoming homeless.
- Strategy 2: **Operations and Support** – Promote and assist in financing support services for the homeless and persons at-risk of becoming homeless.
- Strategy 3: **Prevention and Rapid Re-Housing** – Promote and assist in the prevention of homelessness through anti-eviction and other programs for rapid re-housing.

Other Special Needs Priority

- Strategy 1: **Housing** – Promote and assist to increase the supply of affordable, decent, accessible housing for the elderly, persons with disabilities, persons with HIV/AIDS, victims of domestic violence, persons with alcohol/drug dependency, and persons with other special needs through rehabilitation of existing housing and new construction of accessible housing.
- Strategy 2: **Social Services** – Promote and assist in supporting social service programs and facilities for the elderly, persons with disabilities, persons with HIV/AIDS, victims of domestic violence, persons with alcohol/drug dependency, and persons with other special needs.
- Strategy 3: **Accessibility** – Promote and assist in making accessibility improvements to owner occupied housing through rehabilitation and improve renter occupied housing by promoting reasonable accommodations for the physically disabled

Community Development Priority

- Strategy 1: **Infrastructure** – Improve the City’s infrastructure through reconstruction and new construction of streets, walks, curbs, ADA ramps, retaining walls, sewer, water, storm water management, bridges, bike trails, green infrastructure, etc.
- Strategy 2: **Community Facilities** – Improve the City's parks, recreational centers, community centers, and public community facilities through rehabilitation and new construction.
- Strategy 3: **Public Services** – Improve and increase public service programs for the youth, the elderly, disabled, and in general, public service programs for low- and moderate-income persons.
- Strategy 4: **Food Programs** – Provide assistance for food and nutritional programs for low- and moderate-income persons

Community Development Priority (Cont'd.)

- Strategy 5: **Public Transit** – Promote the development of additional bus routes and improve public transportation for low- and moderate-income persons.
- Strategy 6: **Demolition and Clearance** – Remove and eliminate slum and blighting conditions through demolition of vacant, dilapidated, and abandoned structures throughout the City.
- Strategy 7: **Architectural Barriers** – Remove architectural barriers and make public and community facilities accessible to persons with physically disabled.
- Strategy 8: **Public Safety** – Improve public safety through upgrades to facilities, purchase of new equipment, firefighting and prevention, crime prevention, community policing, and ability to respond to emergency situations.

Economic Development Priority

- Strategy 1: **Employment** – Support and encourage new job creation, job retention, workforce development, employment, and job training services for the unemployed and underemployed persons.
- Strategy 2: **Financial Assistance** – Support business and commercial growth through expansion and new development with technical assistance and low interest loan programs.
- Strategy 3: **Redevelopment Program** – Plan and promote the development and redevelopment of vacant commercial and industrial sites, and facilities, and the revitalization efforts in the Greater Five Points Redevelopment Area and other residential neighborhoods.

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Administration, Planning, and Management Priority

- Strategy 1: **Overall Coordination** – Provide program management and oversight for the successful administration of Federal, state, and local funded programs, including planning services for special studies, environmental clearance, fair housing, performance
- Strategy 2: **Fair Housing** – Provide funds for training, education, outreach, and monitoring to affirmatively further fair housing in the City of New Bern

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2024 Annual Action Plan Projects

1.	Project Name	CDBG Administration
	Target Area	Low- and Moderate-Income Areas
	Goals Supported	APM-1 Overall Coordination
	Needs Addressed	Administration, Planning, and Management Priority
	Funding	CDBG: \$58,342.00
	Description	Overall program administration of the CDBG Programs, including: staff salaries, wages, and benefits; related costs to administer the programs including supplies, materials, mailings, duplications, etc.; monitoring and oversight; advertising and public hearing costs; market studies; planning activities and the preparation of the Annual Action Plan, Environmental Review Record, Consolidated Annual Performance and Evaluation Report, Fair Housing, etc.

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2.	Project Name	Demolition and Clearance
	Target Area	Low- and Moderate-Income Areas
	Goals Supported	CDS-5 Clearance
	Needs Addressed	Community Development Priority
	Funding	CDBG: \$65,000.00
	Description	Demolition of vacant substandard structures to remove slums and blight on a spot basis in the City.
	Target Date	6/30/2025
	Estimate the number and type of families that will benefit from the proposed activities	5 Structures

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3.	Project Name	Street and Sidewalk Improvements
	Target Area	Greater Five Points
	Goals Supported	CD-1 Infrastructure
	Needs Addressed	Community Development Priority
	Funding	CDBG: \$168,372.00
	Description	CDBG funds will be used to reconstruct streets and make sidewalk improvements in the Five Points neighborhood.
	Target Date	6/30/2025
	Estimate the number and type of families that will benefit from the proposed activities	1 Other
	Location Description	Citywide
	Planned Activities	The National Objective is Low/Mod Area Benefit (LMA). The HUD Matrix Codes are 03K Street Improvements and 03L Sidewalks.

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2024 Budget Summary

- Program Administration: \$58,342.00
- Demolition and Clearance: \$65,000.00
- Street and Sidewalk Improvements: \$168,372.00

FY 2024 CDBG Allocation Total: \$291,714.00

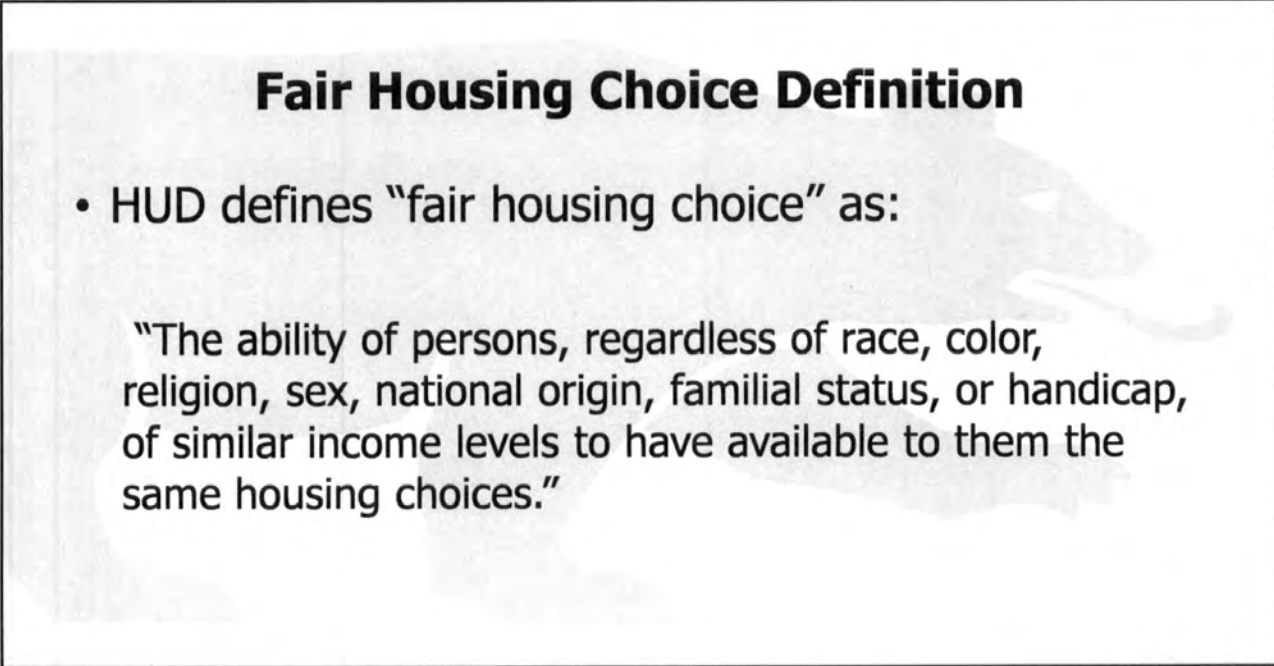
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Analysis of Impediments to Fair Housing Choice

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Fair Housing Choice Definition

- HUD defines "fair housing choice" as:

"The ability of persons, regardless of race, color, religion, sex, national origin, familial status, or handicap, of similar income levels to have available to them the same housing choices."

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Fundamentals of Analysis

- The sale or rental of dwellings (public or private)
- The provision of housing brokerage services
- The provision of financial assistance for dwellings
- Public policies and actions affecting the approval of sites and other building requirements used in the approval process for the construction of publicly assisted housing
- The administrative policies concerning community development and housing activities, which affect opportunities of minority households to select housing inside or outside areas of minority concentration
- Where there is a determination of unlawful segregation or other housing discrimination by a court or a finding of noncompliance by HUD regarding assisted housing in a recipient's jurisdiction

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Highlights from Analysis

- The majority of housing units in New Bern are single-family detached comprising 63.7% percent (10,360 units) of all housing units.
- Affordability is an important component of fair housing, as income disparities appear between different racial, ethnic, gender, age, and other groups.
- Populations experiencing housing problems disproportionately are often racial or ethnic minorities. Refusal of landlords to improve housing that is substandard can be a form of housing discrimination

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Highlights from the Analysis (Cont'd)

- There does not appear to be any major uniform trends regarding segregation in the City of New Bern.
- The New Bern Housing Authority recognizes the need for accessible and visitable housing units in the City. As a result, more than 5% of all public housing units are handicapped accessible.
 - Disability has become the most common protected class basis for fair housing complaints

Disability is the most common housing complaint in the City of New Bern.

**Basis for Housing Complaints in the
City of New Bern and Craven County, 2014-2023**

Basis	City of New Bern		Craven County	
	Count*	% of City Complaints	Count*	% of County Complaints
Race	1	20.0%	3	36.21%
Color	0	-	0	-
National Origin	0	-	0	-
Religion	0	-	0	-
Sex	0	-	0	-
Disability	4	80.0%	10	53.50%
Familial Status	0	-	1	10.29%
Retaliation	0	-	2	7.41%
Total*	5	-	14	-

Source: Fair Housing Equity Office Region IV

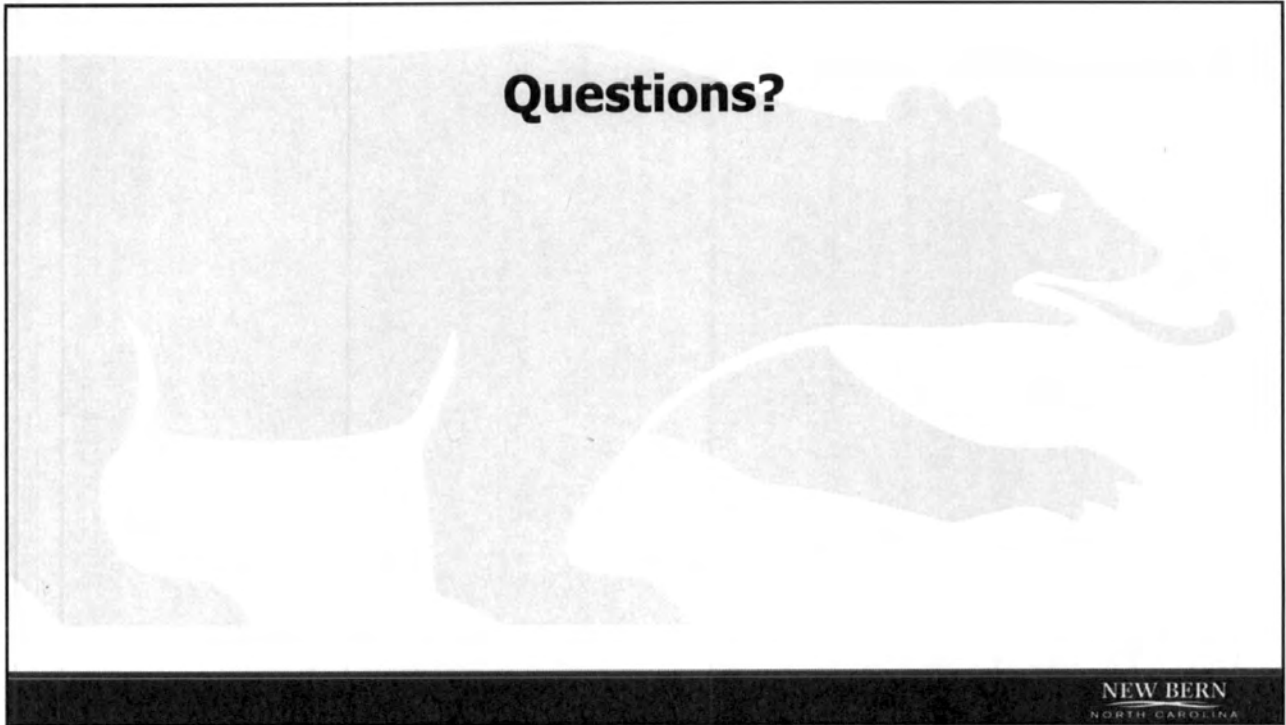
*Note: Each complaint may include multiple bases, so the counts do not add up to the total number of complaints

Summary

- The City of New Bern will work to address multiple community needs outlined in the Five-Year Consolidated Plan.
- Submission of the Annual Action Plan each year is an active approach to identifying and addressing priority needs.
- City will continue to select projects that ensure timeliness to receive entitlement grant.

Next Steps

- The required display period (30 days) of the plans ends on July 15, 2024
- A resolution to approve the plans will be presented at the July 23, 2024, BOA Meeting.
- The plans are presented and approved in separate meetings to satisfy the display period requirement.





NEW BERN

CITY OF NEW BERN

**FY 2024-2028 Five-Year
Consolidated Plan and
FY 2024 Annual Action Plan**

**For Submission to HUD for the
Community Development Block Grant Program**

July 23, 2024



Honorable Jeffrey T. Odham, *Mayor*

Foster Hughes, *City Manager*

Jessica Rhue, *Director of Development Services*

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AP-65 Homeless and Other Special Needs Activities – 91.220(i)..... 182

AP-75 Barriers to affordable housing – 91.220(j) 186

AP-85 Other Actions – 91.220(k) 188

AP-90 Program Specific Requirements 194

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Executive Summary

ES-05 Executive Summary - 24 CFR 91.200(c), 91.220(b)

1. Introduction

The City of New Bern, as a Federal entitlement community, is required to complete and submit an annual plan for the use of Community Development Block Grant (CDBG) funds to the U.S. Department of Housing and Urban Development (HUD). The City of New Bern has prepared its Five Year Consolidated Plan for the period of FY 2024 through FY 2028 (July 1, 2024 to June 30, 2028). The Five Year Consolidated Plan is a strategic plan to implement Federal programs for housing and community development activities within the City of New Bern and how the proposed activities will principally benefit low- and moderate-income persons. The Five Year Consolidated Plan is a requirement of the U.S. Department of Housing and Urban Development (HUD) under the Community Development Block Grant (CDBG) Program that must be completed by the entitlement community every five (5) years in conjunction with an update to the City's Analysis of Impediments to Fair Housing Choice (AI).

The Five Year Consolidated Plan establishes the City's goals for the next five (5) year period and outlines the specific initiatives the City will undertake to address these goals by:

- encouraging the development of decent housing,
- promoting a suitable living environment, and
- expanding economic opportunities

The City of New Bern has established the following FY 2024-2028 Five Year Consolidated Plan Priorities for the next five (5) year period:

- Housing Priority;

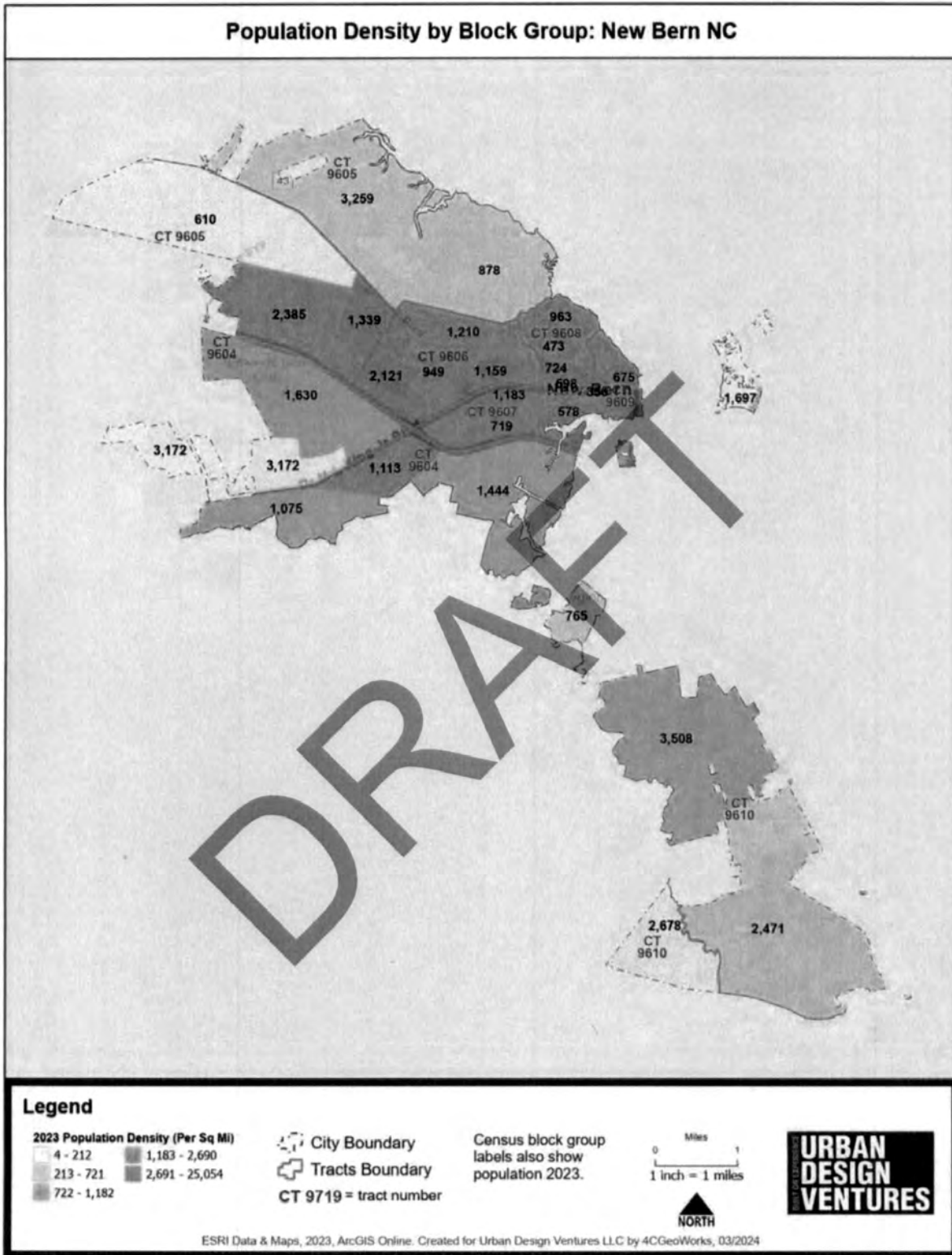
- Homeless Priority;
- Other Special Needs Priority;
- Community Development Priority;
- Economic Development Priority; and
- Administration, Planning, and Management Priority

The Five Year Consolidated Plan is a collaborative planning process between the City, the community at large, social service agencies, housing providers, community development groups, and economic development agencies. The process was implemented through a series of public meetings, stakeholder surveys, statistical data, and reviews of previous community development plans.

Maps

The following maps illustrate the demographic characteristics of the City of New Bern:

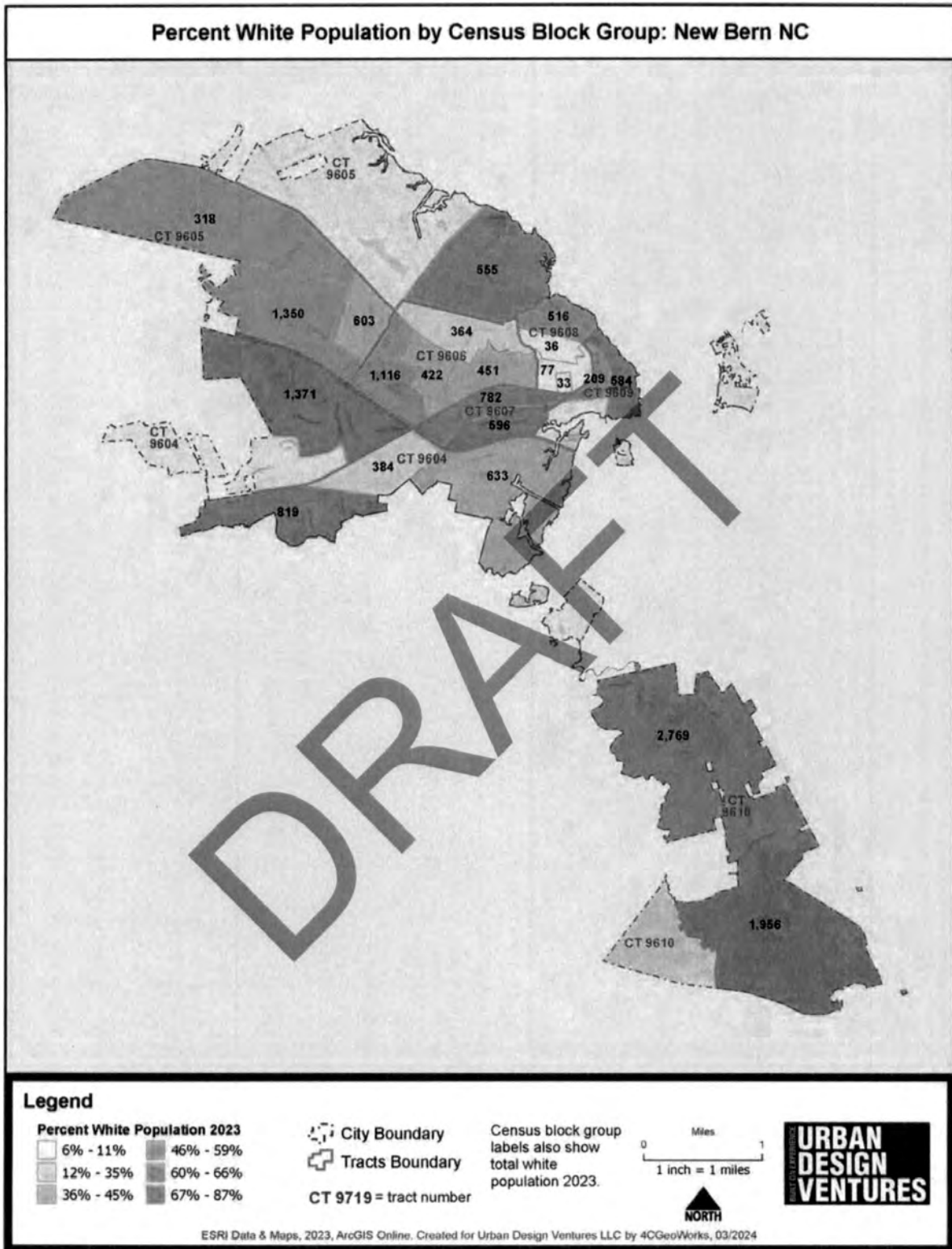
- Population Density by Block Group
- Racial Diversity by Block Group
- Percent White Population by Block Group
- Percent Minority Population by Block Group
- Percent Hispanic Population by Block Group
- Percent Population Age 65 and Over by Block Group
- Total Housing Units by Block Points
- Percent Owner-Occupied Housing Units by Block Group
- Percent Renter-Occupied Housing Units by Block Group
- Percent Vacant Housing Units by Block Group
- Low-Moderate Income Percentage by Block Group
- Low-Moderate Income with Minority Percentage by Block Group
- Commercial Hot Spots



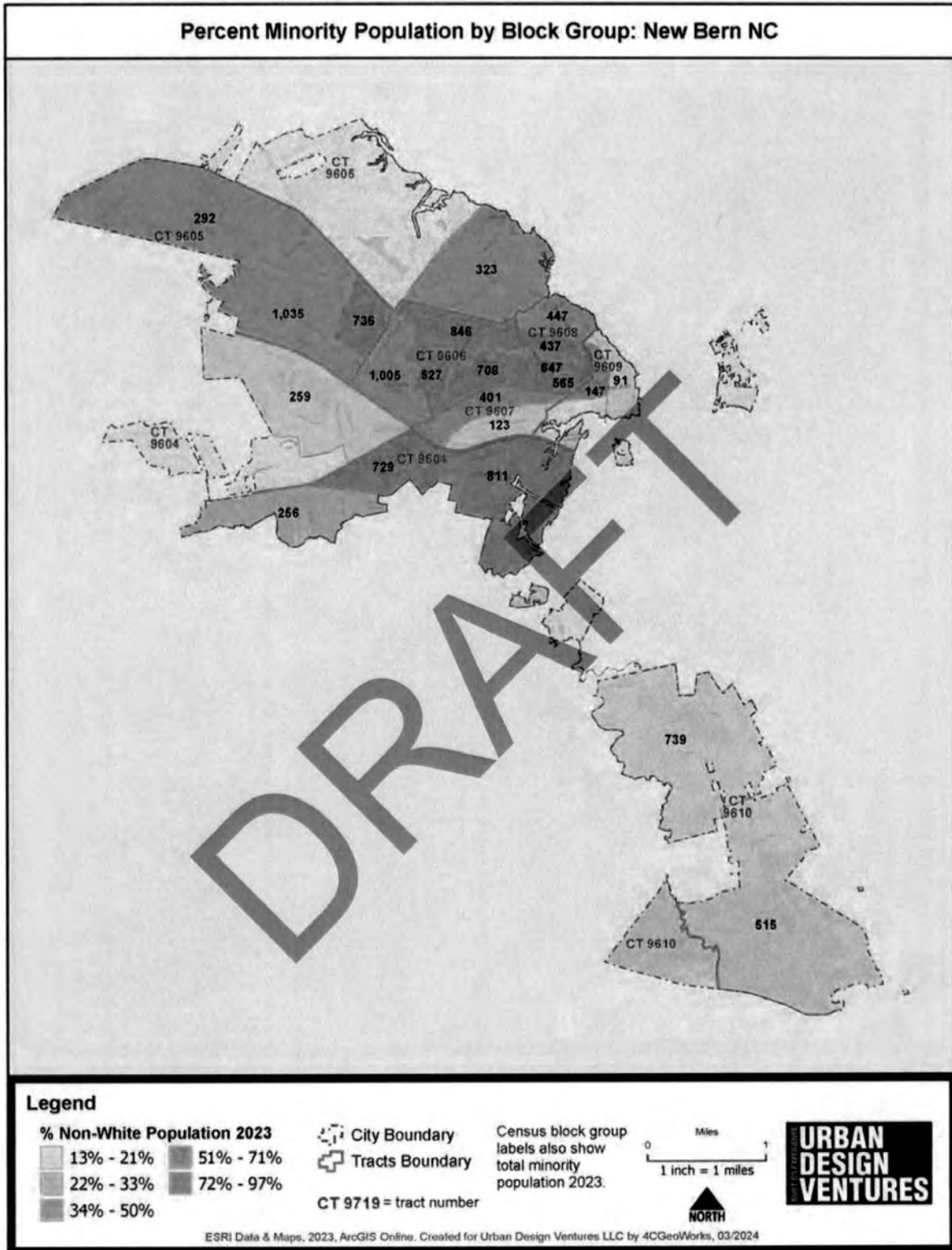
Population Density by Block Group



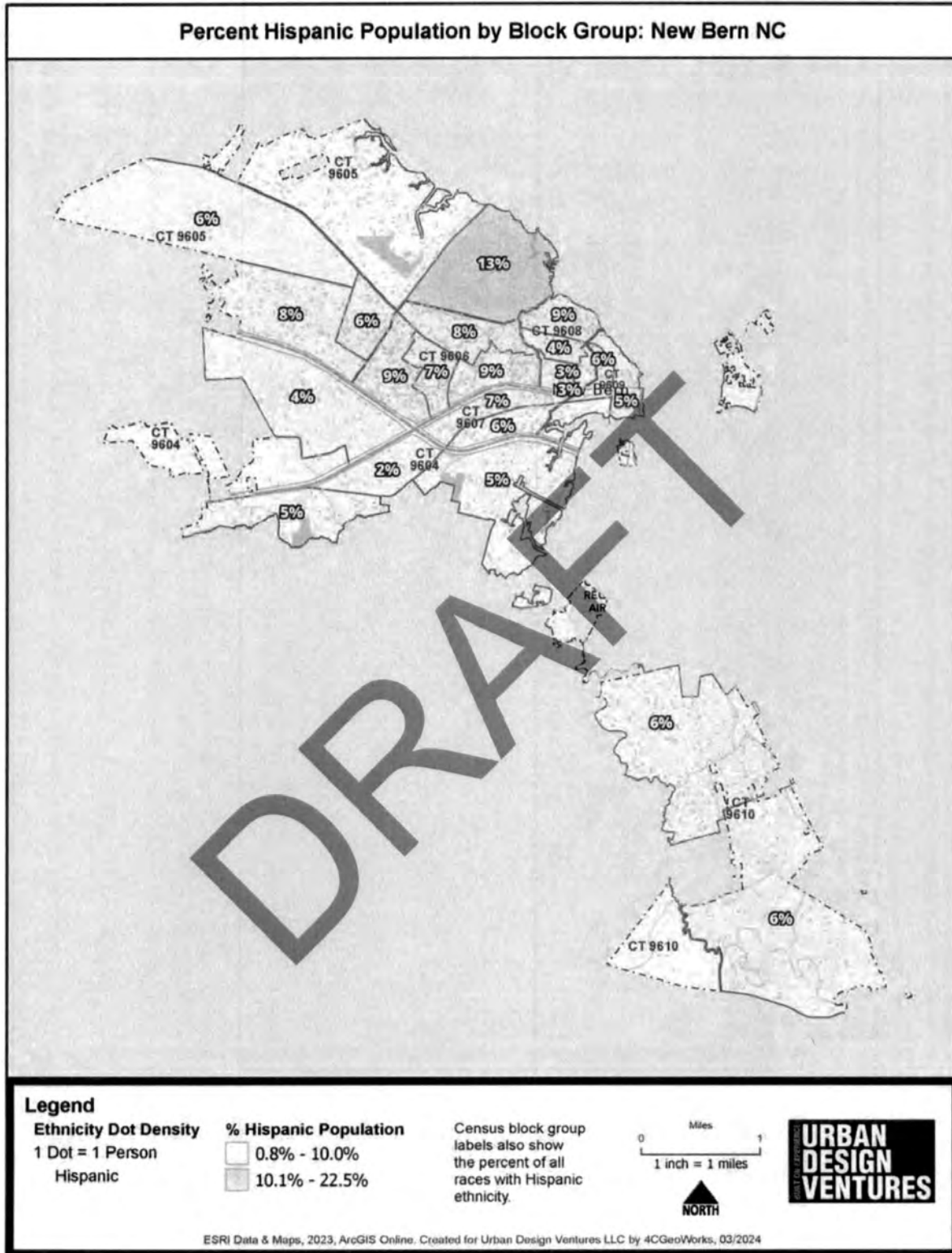
Racial Diversity by Block Group



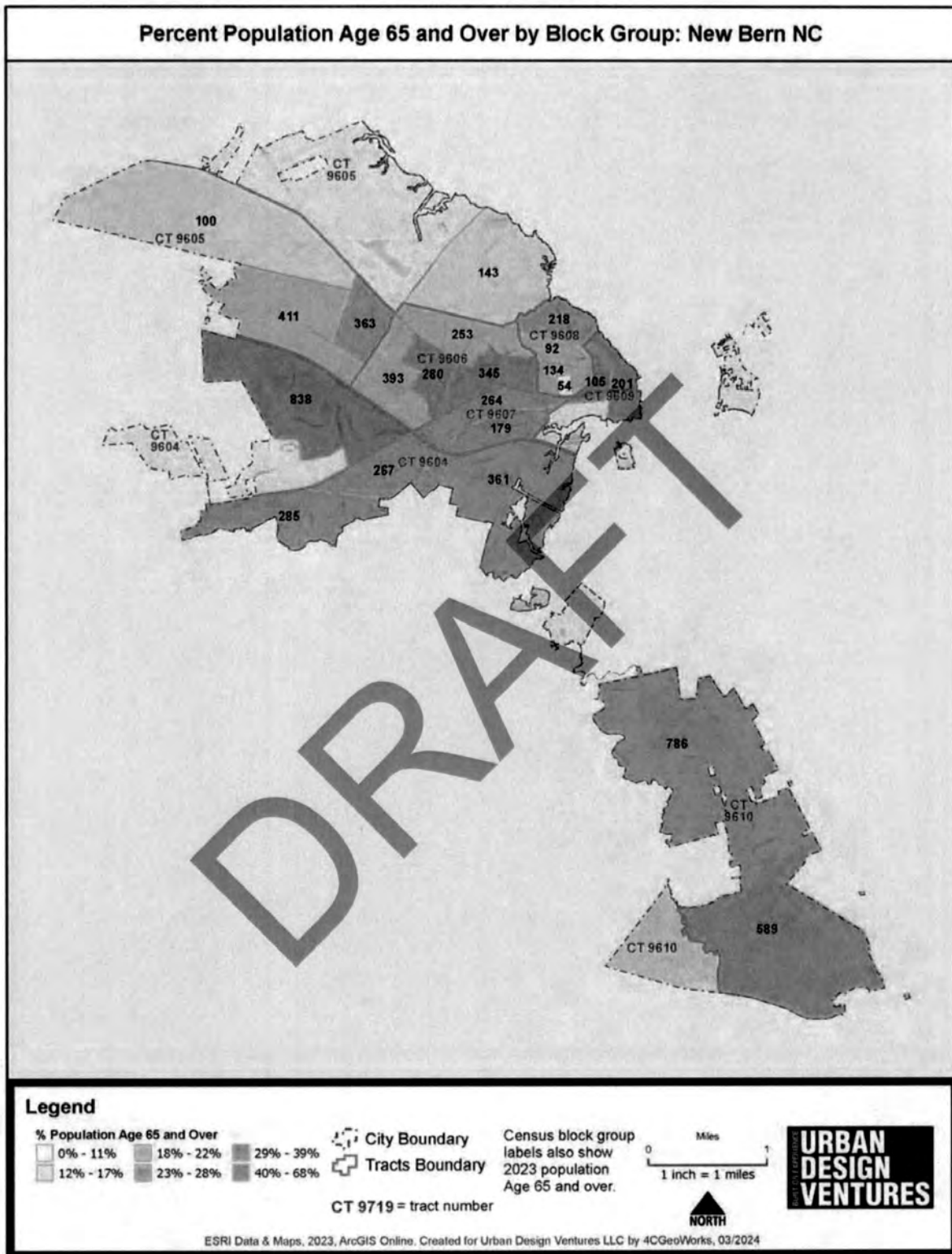
Percent White Population by Block Group



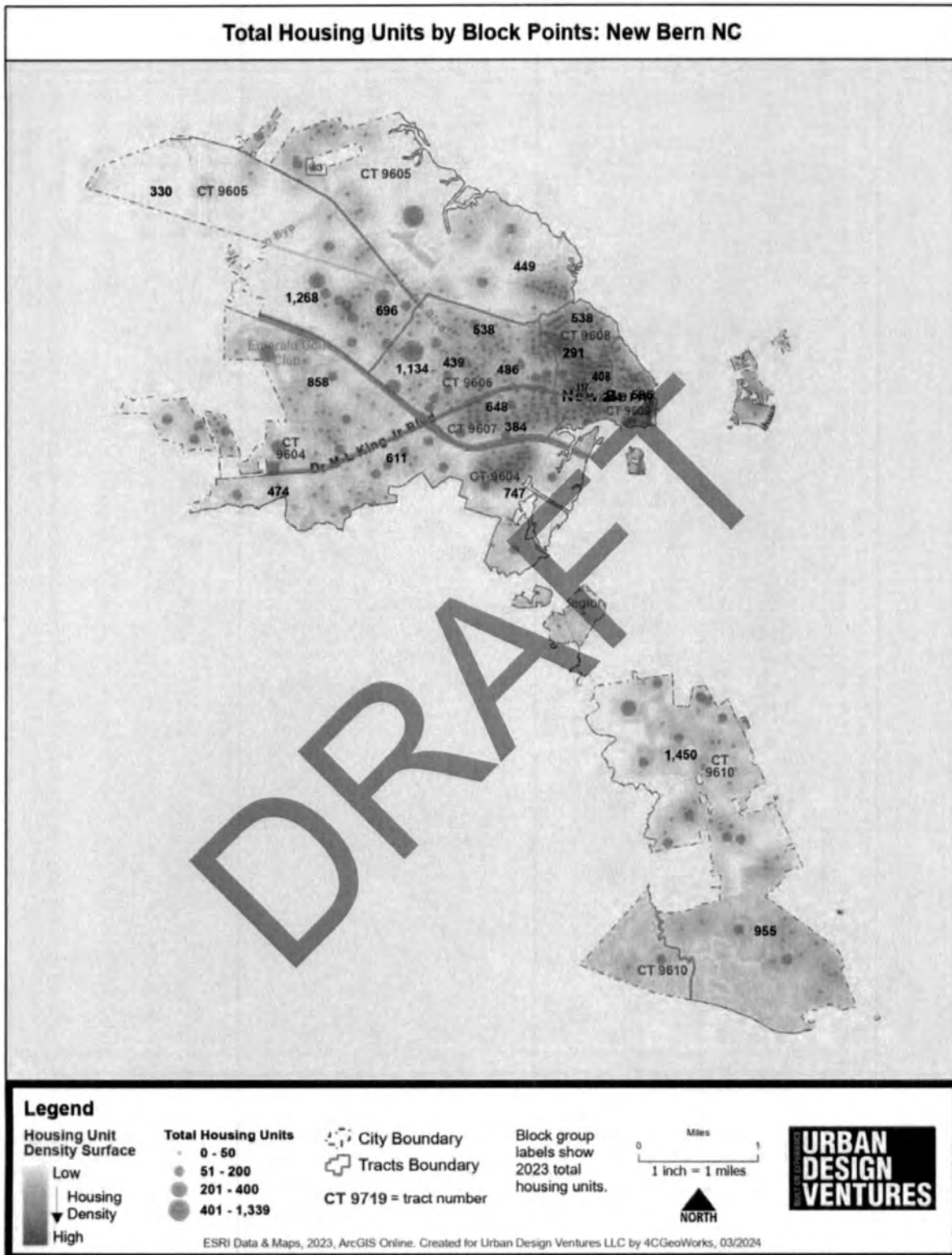
Percent Minority Population by Block Group



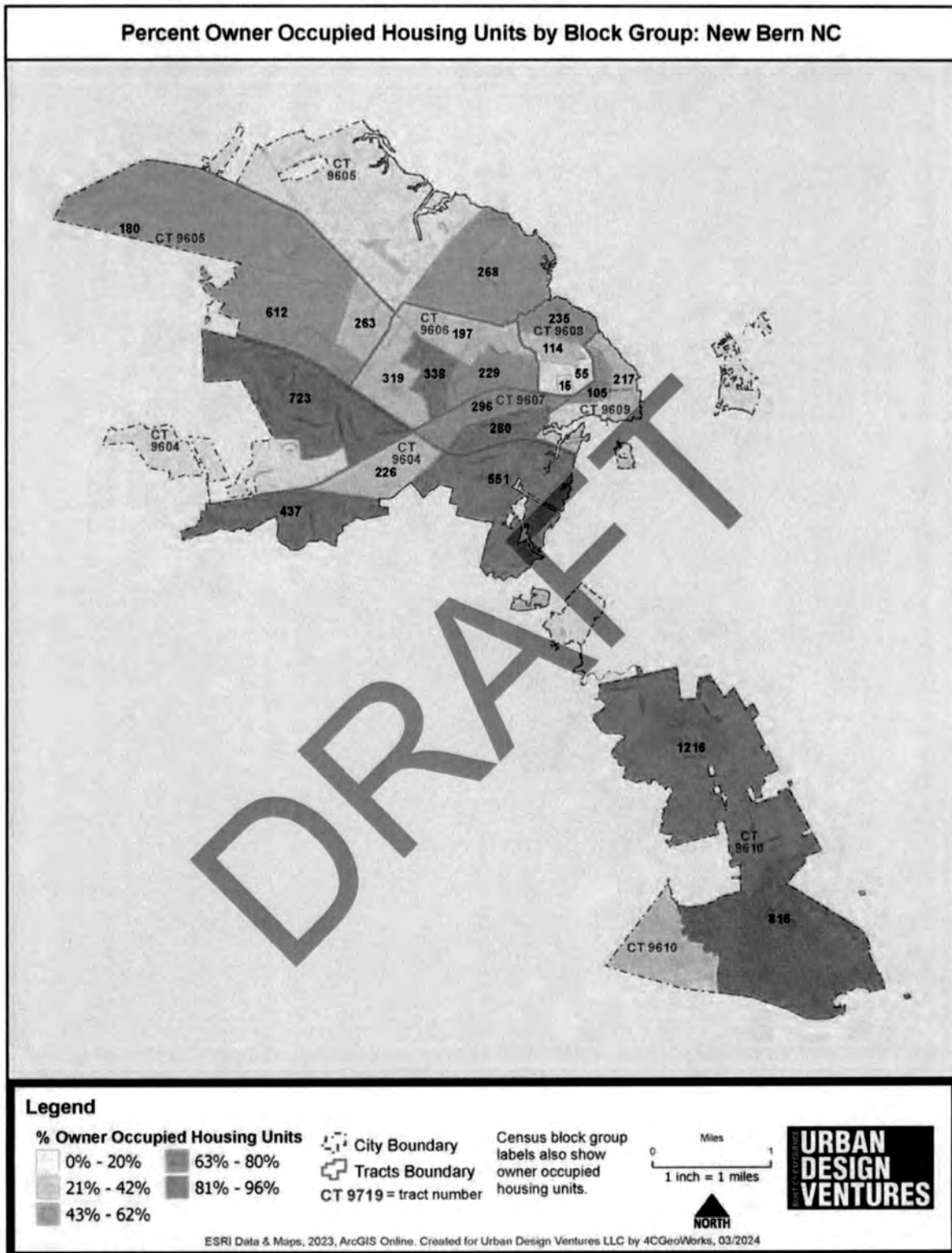
Percent Hispanic Population by Block Group



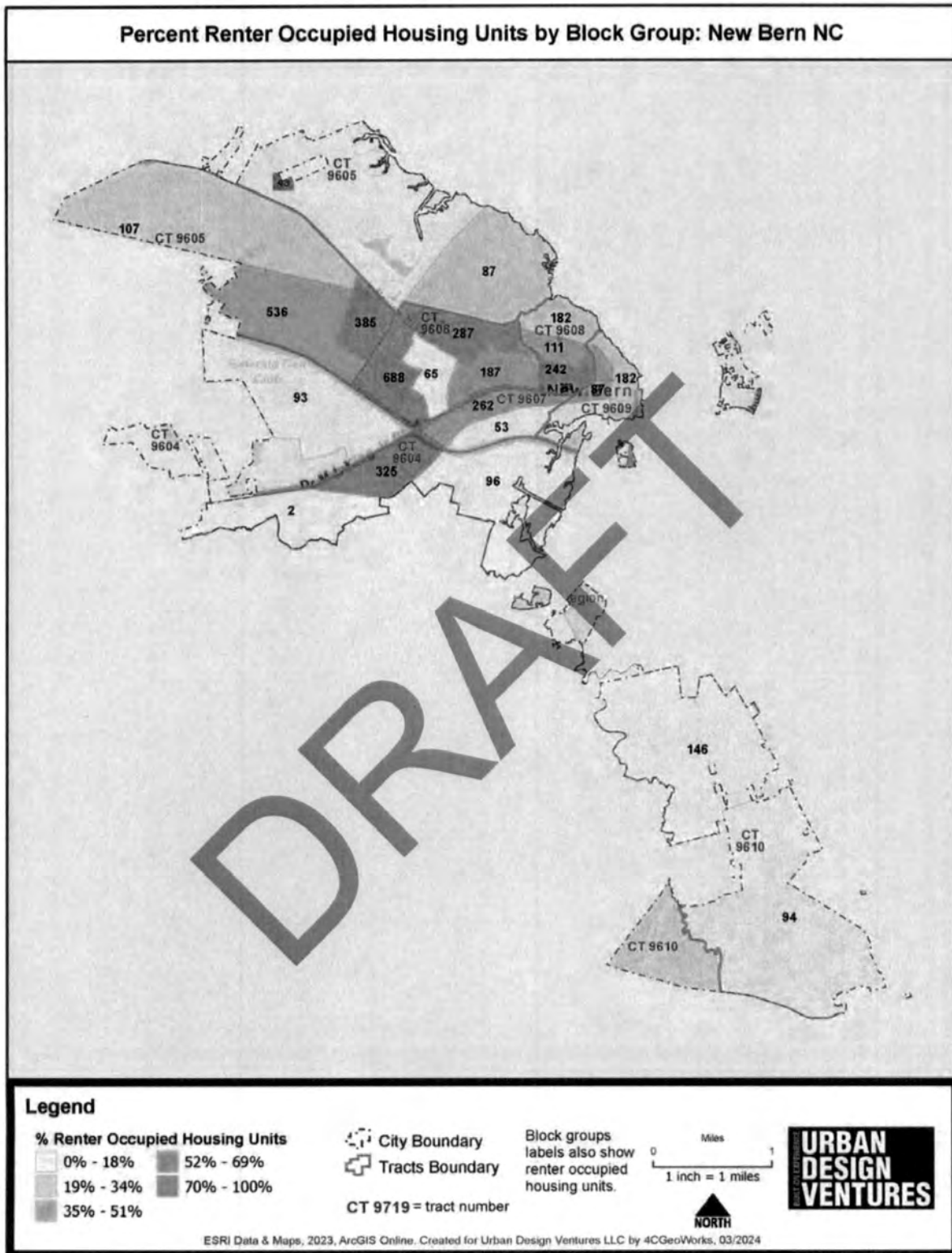
Percent Population Age 65 and Over by Block Group



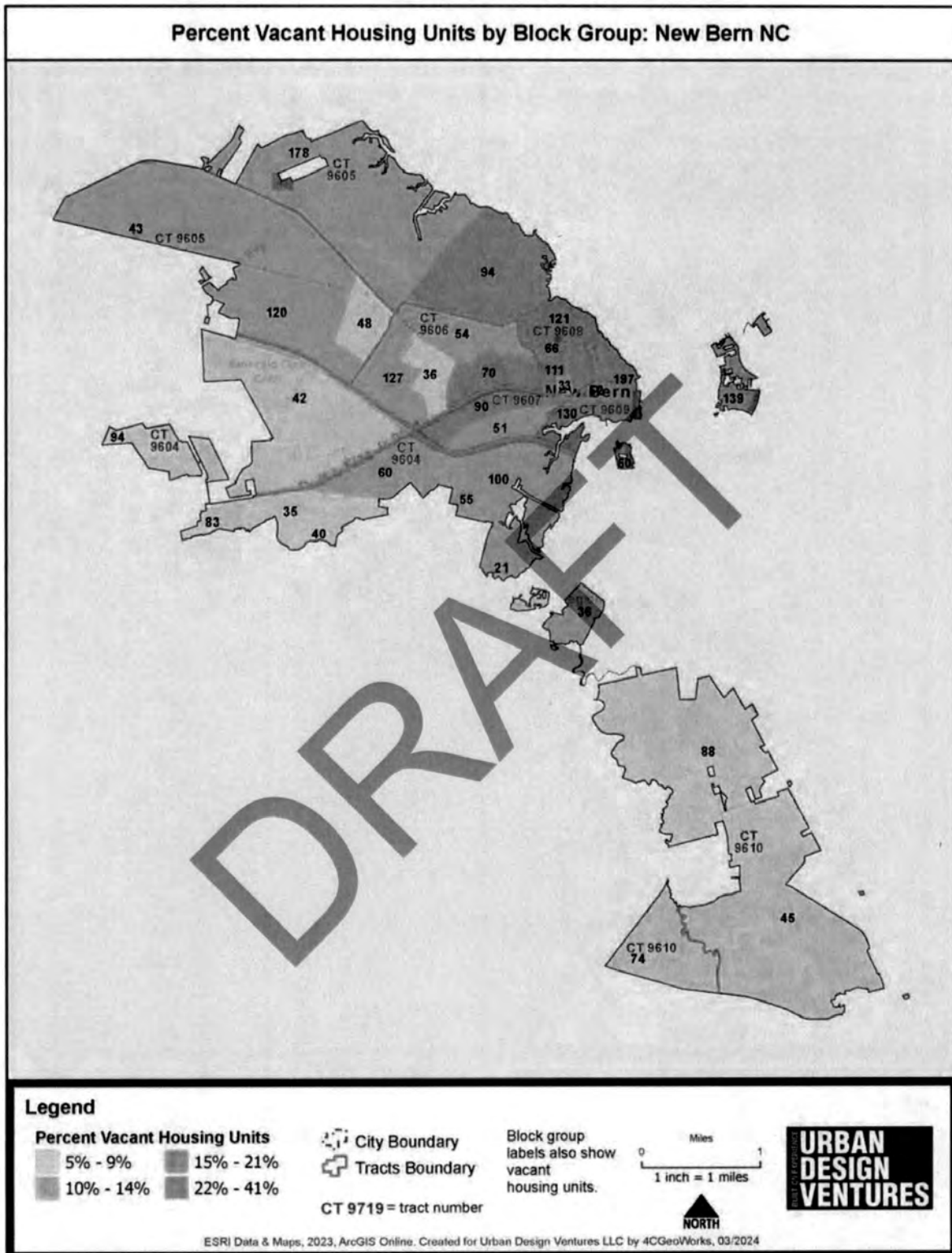
Total Housing Units by Block Points



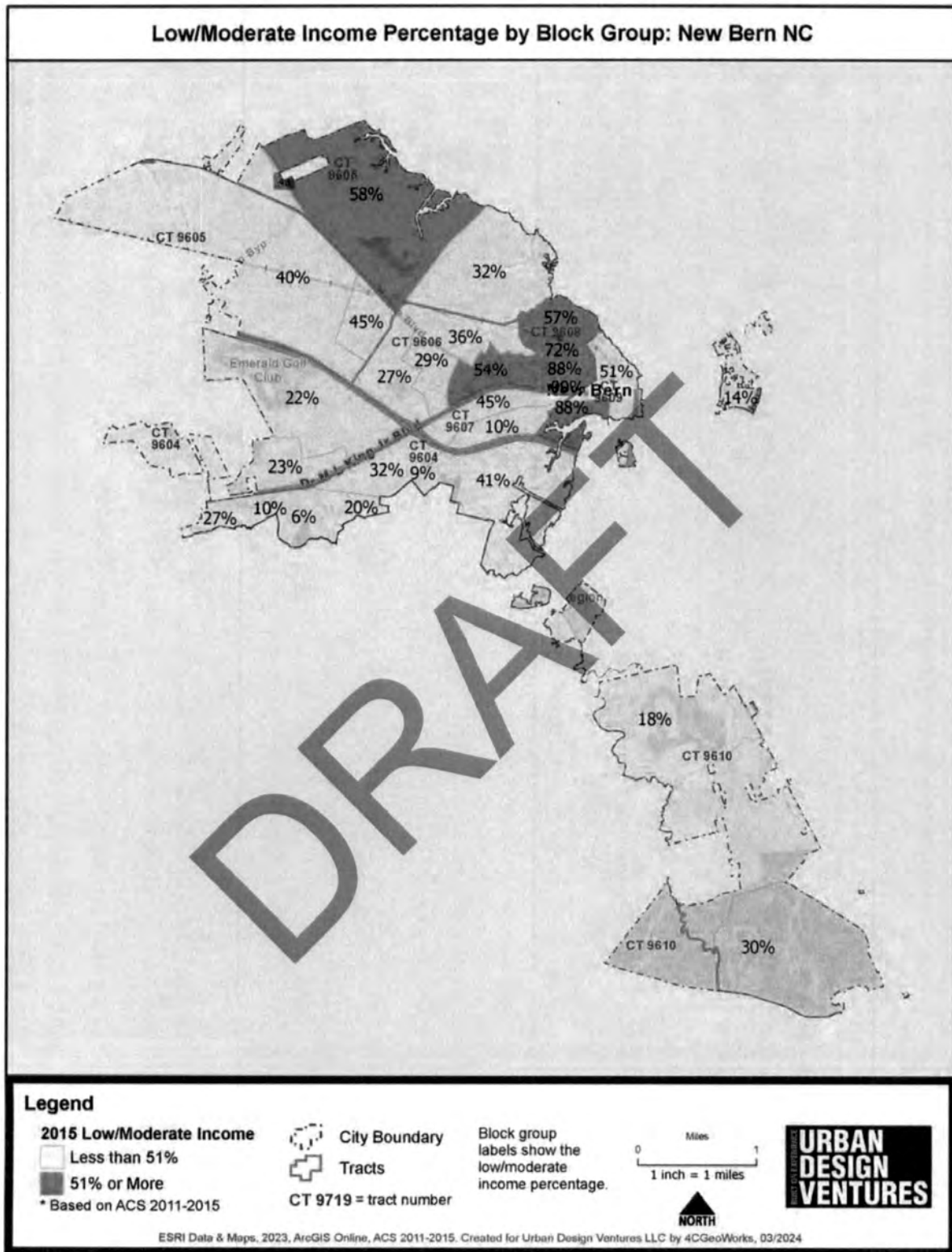
Percent Owner-Occupied Housing Units by Block Group



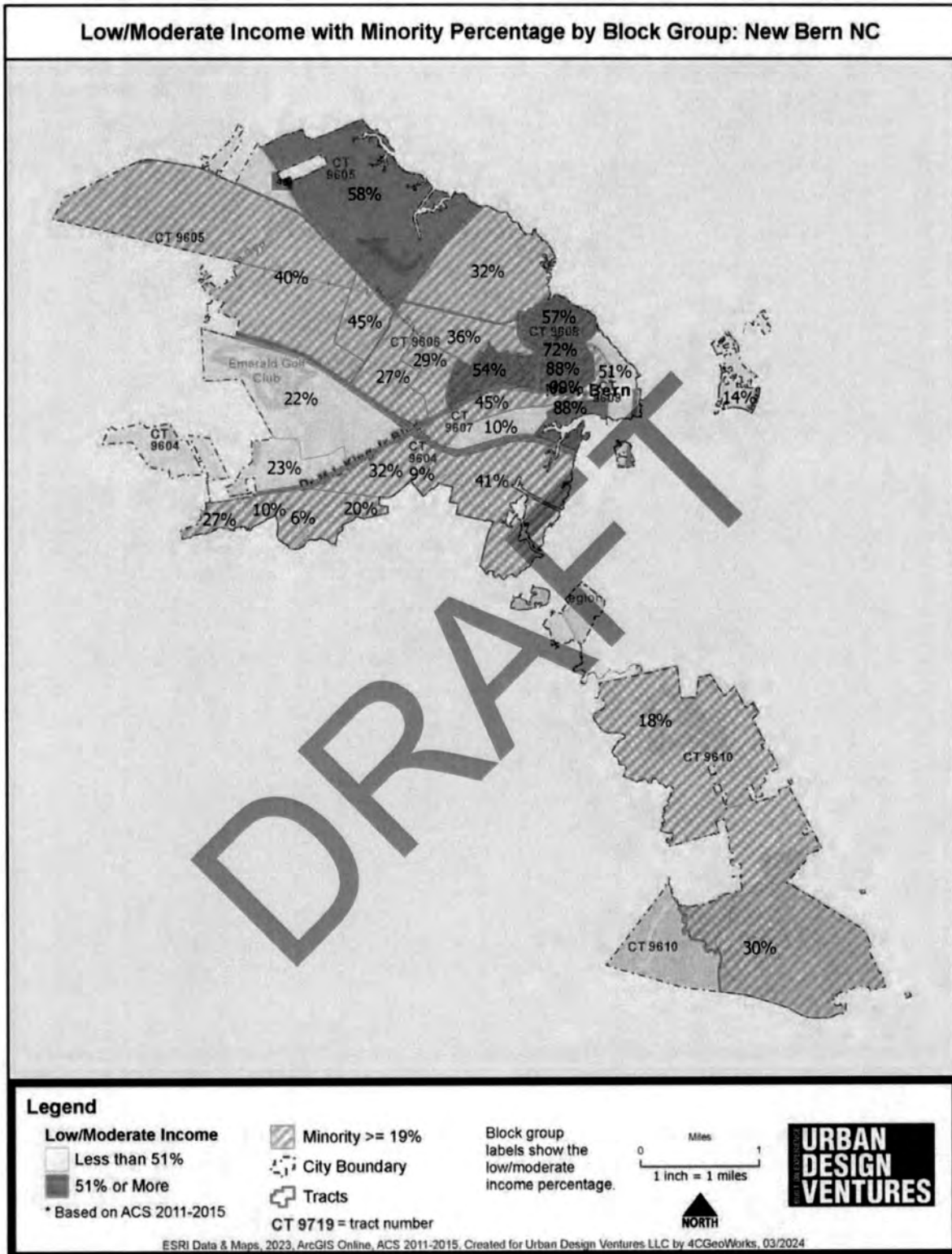
Percent Renter-Occupied Housing Units by Block Group



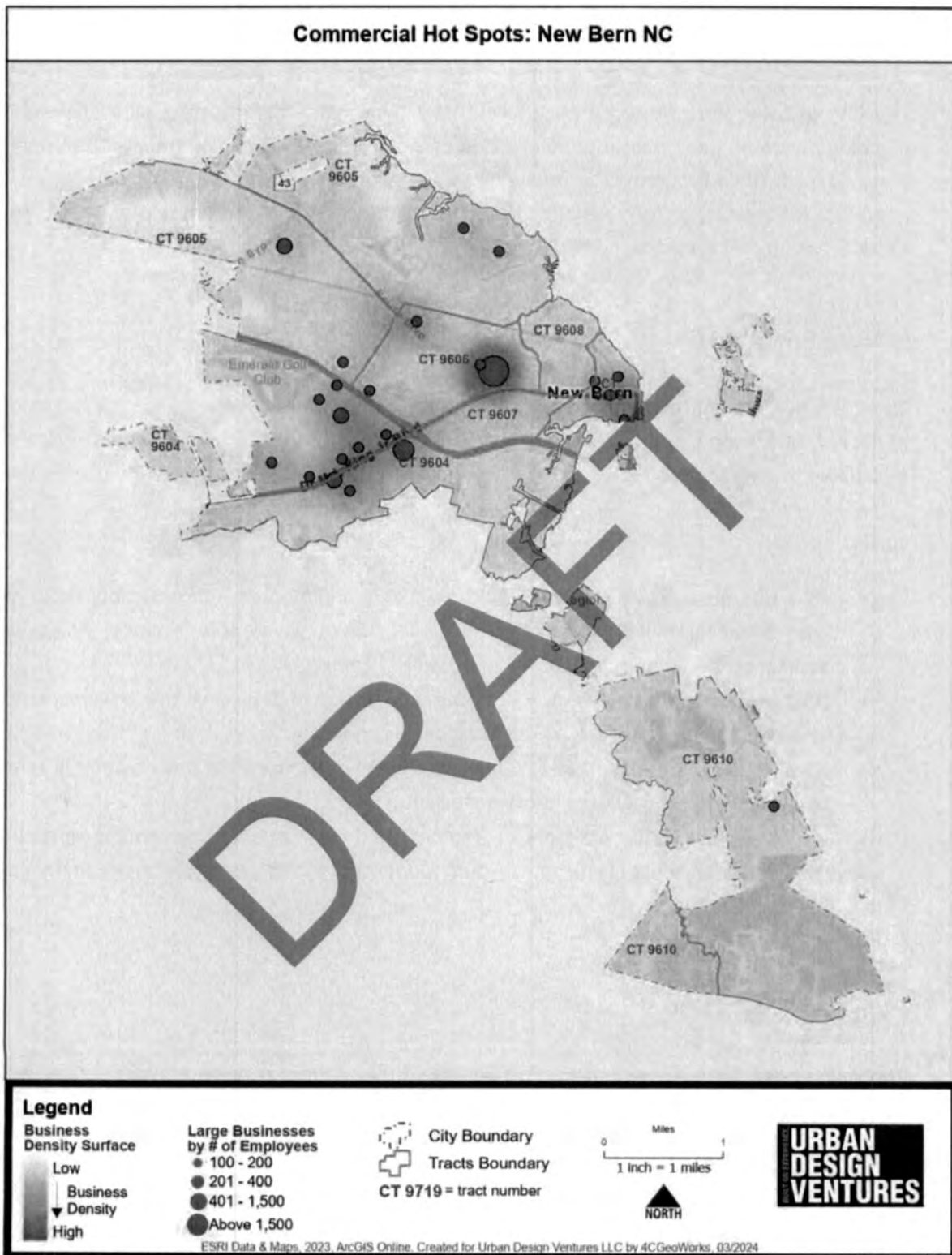
Percent Vacant Housing Units by Block Group



Low-Moderate Income Percentage by Block Group



Low-Moderate Income with Minority Percentage by Block Group



Commercial Hot Spots

2. Summary of the objectives and outcomes identified in the Plan Needs Assessment Overview

The City of New Bern, North Carolina's Five Year Consolidated Plan serves as a consolidated planning document, an application, and a strategic plan for the City's Community Development Block Grant (CDBG) Program. The following six (6) priorities with subsequent goals have been identified for the City of New Bern for the FY 2024 through FY 2028 Community Development Block Grant (CDBG) Program:

Housing Priority - HS

There is a need to improve the quality of the housing stock in the City by increasing the amount of decent, safe, sound, and accessible housing for homeowners, renters, and homebuyers, that is affordable to low- and moderate-income persons and households living in the City of New Bern.

Goals:

- **HS-1 Homeownership** – Promote and assist low- and moderate-income households who wish to become homeowners by providing down payment assistance, closing cost assistance, and requiring housing counseling training.
- **HS-2 Housing Construction** – Promote and assist in financing the development of affordable housing for both rental and for sales housing.
- **HS-3 Housing Rehabilitation** – Promote and assist in financing the preservation of existing owner and renter occupied housing stock in the City.
- **HS-4 Rent and Utility Assistance** – Promote and assist in financing short term rent and utility assistance programs for low- and moderate-income persons who are in danger of becoming homeless.

Homeless Priority - HO

There is a need for housing and support services for homeless persons and persons at-risk of becoming homeless.

Goals:

- **HO-1 Housing** – Promote and assist in developing housing opportunities for homeless persons and households, and those who may be at-risk of becoming homeless.
- **HO-2 Operations and Support** – Promote and assist in financing support services for the homeless and persons at-risk of becoming homeless.

- **HO-3 Prevention and Rapid Re-Housing** – Promote and assist in the prevention of homelessness through anti-eviction and other programs for rapid re-housing.

Other Special Needs Priority - SN

There is a continuing need for affordable housing, services, and facilities for the elderly, persons with disabilities, persons with HIV/AIDS, victims of domestic violence, persons with alcohol/drug dependency, and persons with other special needs.

Goals:

- **SN-1 Housing** – Promote and assist to increase the supply of affordable, decent, safe, sound, and accessible housing for the elderly, persons with disabilities, persons with HIV/AIDS, victims of domestic violence, persons with alcohol/drug dependency, and persons with other special needs through rehabilitation of existing housing and new construction of accessible housing.
- **SN-2 Social Services** – Promote and assist in supporting social service programs and facilities for the elderly, persons with disabilities, persons with HIV/AIDS, victims of domestic violence, persons with alcohol/drug dependency, and persons with other special needs.
- **SN-3 Accessibility** – Promote and assist in making accessibility improvements to owner occupied housing through rehabilitation and improve renter occupied housing by promoting reasonable accommodations for the physically disabled.

Community Development Priority - CD

There is a need to improve the public and community facilities, infrastructure, public social/welfare services, food programs, public safety, clearance, and the quality of life for all residents of the City of New Bern.

Goals:

- **CD-1 Infrastructure** – Improve the City's infrastructure through reconstruction and new construction of streets, walks, curbs, ADA ramps, retaining walls, sewer, water, storm water management, bridges, bike trails, green infrastructure, etc.
- **CD-2 Community Facilities** – Improve the City's parks, recreational centers, community centers, and public community facilities through rehabilitation and new construction.
- **CD-3 Public Services** – Improve and increase public service programs for the youth, the elderly, disabled, and in general, public service programs for low- and moderate-income persons.

- **CD-4 Food Programs** – Provide assistance for food and nutritional programs for low- and moderate-income persons.
- **CD-5 Public Transit** – Promote the development of additional bus routes and improve public transportation for low- and moderate-income persons.
- **CD-6 Demolition and Clearance** – Remove and eliminate slum and blighting conditions through demolition of vacant, dilapidated, and abandoned structures throughout the City.
- **CD-7 Architectural Barriers** – Remove architectural barriers and make public and community facilities accessible to persons with physically disabled.
- **CD-8 Public Safety** – Improve public safety through upgrades to facilities, purchase of new equipment, firefighting and prevention, crime prevention, community policing, and ability to respond to emergency situations.

Economic Development Priority – ED

There is a need to increase and promote job creation, job retention, self-sufficiency, education, job training, technical assistance, and economic empowerment for low- and moderate-income residents of the City of New Bern.

Goals:

- **ED-1 Employment** – Support and encourage new job creation, job retention, workforce development, employment, and job training services for the unemployed and underemployed persons.
- **ED-2 Financial Assistance** – Support business and commercial growth through expansion and new development with technical assistance and low interest loan programs.
- **ED-3 Redevelopment Program** – Plan and promote the development and redevelopment of vacant commercial and industrial sites, and facilities, and the revitalization efforts in the Greater Five Points Redevelopment Area and other residential neighborhoods.

Administration, Planning, And Management Priority - APM

Provide sound and professional planning, administration, oversight and management of Federal, state, and local funded programs.

Goals:

- **APM-1 Overall Coordination** – Provide program management and oversight for the successful administration of Federal, state, and local funded programs, including planning services for special studies, environmental clearance, fair housing, performance

evaluation, monitoring, and compliance with all Federal, state, and local laws and regulations.

- **APM-2 Fair Housing** – Provide funds for training, education, outreach, and monitoring to affirmatively further fair housing in the City of New Bern.

3. Evaluation of past performance

Each year, the City of New Bern prepares and submits its CAPER to HUD within ninety (90) days after the start of the new program year. The FY 2022 CAPER is the most recent CAPER to be completed by the City of New Bern. The CAPER was approved by HUD. The City obligated 100% of its CDBG funds for the benefit of low- and moderate-income persons. The City was under its 15% public services cap. The City was at the 20% administrative cap. The City's drawdown ratio was 1.33, which is below the 1.5 HUD requirement.

4. Summary of citizen participation process and consultation process

The City has adopted a Citizen Participation Plan (CPP) that outlines the City's policies and procedures for obtaining public input in the planning and decision-making processes associated with the HUD grants. This process included two (2) public hearings and opportunities to submit written comments on the draft plan.

A copy of the plan is currently available for review at the Development Services Department. All comments received during the public comment period will be summarized and addressed as part of the final submission of the plan. Comments received after the completion of the public comment period will still be considered by the City but may not be included in the final submission.

Comments may be sent to:

Ms. D'Aja Fulmore
Community Development Coordinator
City of New Bern's Development Services Department
Economic and Community Development Office
303 First Street, PO Box 1129, New Bern, NC 28563
Phone: (252) 639-7586
Fax: (252) 636-2146
Email: fulmored@newbernc.gov
Website: <http://www.newbernc.gov>

The City conducted consultations with a wide range of community stakeholders, including local social services agencies, housing providers, other City Departments, and other government agencies and offices. A complete list of all consultations is included in PR-10.

5. Summary of public comments

A summary of all public comments received will be included as an attachment to the final submission to HUD.

6. Summary of comments or views not accepted and the reasons for not accepting them

All comments and suggestions that were received to date, have been accepted and incorporated into the planning documents.

7. Summary

To develop this Five Year Consolidated Plan, the City analyzed the level of need through citizen outreach, consultations with service providers, and a review of needs-related data and the local market. The results of the needs assessment indicate the needs of the community have not significantly changed from the last five-year plan. The most pressing needs continue to be the rising cost of housing, the substandard condition of housing, a lack of private investments within the city, and a large number of blighted properties. As such, the resources available to the City through the programs covered by this plan, including the Community Development Block Grant (CDBG), will focus on the improvement of the condition of existing housing stock and investment into public facilities and services that improve the quality of life within the City. The City will also work to better serve its homeless populations and non-homeless populations with special needs.

8. FY 2024 CDBG Budget

Available Funds:

During the FY 2024 Program Year, the City of New Bern will receive the following Federal funds:

- **CDBG: \$291,714.00**
- **Total: \$291,714.00**

FY 2024 CDBG Programs Budget:

The City of New Bern proposes to undertake the following activities with the FY 2024 CDBG Funds:

- **CD-24-01 CDBG Administration** - \$58,342.00
- **CD-24-02 Demolition and Clearance** - \$65,000.00
- **CD-24-03 Street and Sidewalk Improvements** - \$168,372.00
- **FY 2024 CDBG Total = \$ \$291,714.00**

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The Process

PR-05 Lead & Responsible Agencies 24 CFR 91.200(b)

1. Describe agency/entity responsible for preparing the Consolidated Plan and those responsible for administration of each grant program and funding source

The following are the agencies/entities responsible for preparing the Consolidated Plan and those responsible for administration of each grant program and funding source.

Agency Role	Name	Department/Agency
Lead Agency	City of New Bern	Development Services Department
CDBG Administrator	City of New Bern	Development Services Department

Table 1 – Responsible Agencies

Narrative

The City of New Bern Development Services Department is the administrating agency for the CDBG program. The Development Services Department has sufficient and knowledgeable full-time staff members and a planning consulting firm to help assist with the oversight and compliance of the CDBG program. The Development Services Department prepares the Five Year Consolidated Plans, Annual Action Plans, Environmental Review Records (ERRs), the Consolidated Annual Performance and Evaluation Reports (CAPERs), prepares the vouchers and draw the funds from the Integrated Disbursement and Information System (IDIS), administers contracts, and oversees the programs on a day to day basis. Subrecipients are monitored through desk reviews and/or on-site interviews, on an annual basis for compliance.

Five Year Consolidated Plan Public Contact Information

Ms. D’Aja Fulmore
 Community Development Coordinator
 City of New Bern’s Development Services Department
 Economic and Community Development Office
 303 First Street, PO Box 1129, New Bern, NC 28563
 Phone: (252) 639-7586
 Fax: (252) 636-2146
 Email: fulmored@newbernnc.gov
 Website: <http://www.newbernnc.gov>

PR-10 Consultation – 91.100, 91.110, 91.200(b), 91.300(b), 91.215(I) and 91.315(I)**1. Introduction**

The City has adopted a Citizen Participation Plan (CPP) that outlines the City's policies and procedures for obtaining public input in the planning and decision-making processes associated with the HUD grants. During the planning of the FY 2024-2028 Five Year Consolidated Plan and FY 2024 Annual Action Plan, the City of New Bern consulted with different departments of the City of New Bern, the New Bern Housing Authority, social service agencies and organizations, housing agencies and organizations, community development agencies and organizations, economic development agencies and organizations, healthcare organizations, advocacy organizations, and the North Carolina Balance of State Continuum of Care Region 13.

Provide a concise summary of the jurisdiction's activities to enhance coordination between public and assisted housing providers and private and governmental health, mental health and service agencies (91.215(I)).

As part of this year's planning process, the City conducted a number of consultations with service providers and government agencies. Consultations focused on community development needs, strategies, and ways in which coordination could help better serve the community. The City also participated in a number of on-going collaboration efforts, including with the Neuse River Community Development Corporation, Twin Rivers Opportunities, Inc., the New Bern Housing Authority, and the Housing Alliance of Coastal Carolina (HACC) which addresses homeless policy as Region 13 of the North Carolina Balance of State Continuum of Care (CoC). As a result of the consultations, the City will be able to better coordinate with local agencies going forward.

The City of New Bern works with the following agencies to enhance coordination:

- **Neuse River Community Development Corporation** - oversees non-Federally funded housing programs and economic development programs.
- **Twin Rivers Opportunities, Inc.** - oversees Section 8 Housing Choice Vouchers, the Family Self-Sufficiency Program, improvements to public housing communities, and scattered site housing developments.
- **New Bern Housing Authority** - administers the Choice Neighborhood Program, provides housing to low-income City residents.
- **Social Services Agencies/Organizations** - funds to improve services to low- and moderate-income residents of the City of New Bern.
- **Housing Providers** - funds to rehab and develop affordable housing, funds to assist in homeownership, funds to improve housing options for low- and moderate-income families and individuals, and funds to make accessibility improvements.

- **Housing Alliance of Coastal Carolina** - oversees Region 13 of the Balance of State Continuum of Care, addressing the issue of homelessness in Carteret, Craven, Jones, Onslow, and Pamlico Counties.

As part of the CDBG application planning process, local agencies/organizations are invited to submit proposals for CDBG funds for eligible activities. These groups participate in the planning process by attending the public hearing, consultation via Teams, Zoom, phone and/or email, and submission of funding applications.

Describe coordination with the Continuum of Care and efforts to address the needs of homeless persons (particularly chronically homeless individuals and families, families with children, veterans, and unaccompanied youth) and persons at risk of homelessness

The City consulted with the Director of the Housing Alliance of Coastal Carolina (HACC) Continuum of Care (CoC) to discuss current levels of need within the City and the region as a whole. The CoC is focused on serving the homeless and at-risk homeless throughout Craven County. One area that may require better coordination is with homeless prevention. There are several different providers within the area, some that actively participate in the CoC and some that operate outside of the CoC. Another need discussed is the lack of emergency shelters within the City. A more detailed summary of the needs of homeless and those near homelessness can be found in the NA-40 Homeless Needs Assessment and MA-30 Homeless Facilities and Services sections of the plan.

Neither the City of New Bern nor organizations within Craven County (including the County itself) receive HUD Emergency Solutions Grant (ESG) funds. However, the City, the County, and local nonprofits all actively participate in HACC CoC activities to reduce homelessness.

Describe consultation with the Continuum(s) of Care that serves the jurisdiction's area in determining how to allocate ESG funds, develop performance standards and evaluate outcomes, and develop funding, policies and procedures for the administration of HMIS

The City of New Bern does not receive ESG funds directly from HUD. However, the City does work with the CoC to determine the levels of homeless needs and strategies and policies to address those needs.

2. **Describe Agencies, groups, organizations and others who participated in the process and describe the jurisdictions consultations with housing, social service agencies and other entities**

1.	Agency/Group/Organization	City of New Bern
	Agency/Group/Organization Type	Other government - Local Grantee Department
	What section of the Plan was addressed by Consultation?	Housing Need Assessment Homeless Needs - Chronically homeless Homeless Needs - Families with children Homelessness Needs - Veterans Homelessness Needs - Unaccompanied youth Homelessness Strategy Non-Homeless Special Needs Market Analysis Economic Development Anti-poverty Strategy Lead-based Paint Strategy Community Development Strategy
	How was the Agency/Group/Organization consulted and what are the anticipated outcomes of the consultation or areas for improved coordination?	The City of New Bern was the lead entity on the Five Year Consolidated Plan. The City reviewed its program and funded activities that met the goals and objectives as outlined in the City's Five Year Consolidated Plan.
2.	Agency/Group/Organization	City of New Bern – Aldermen
	Agency/Group/Organization Type	Civic Leaders Other government-Local
	What section of the Plan was addressed by Consultation?	Housing Need Assessment Public Housing Needs Homelessness Strategy Market Analysis Other-Community Development Strategy Anti-poverty Strategy Lead-based Paint Strategy Other-Asbestos Abatement Strategy
	How was the Agency/Group/Organization consulted and what are the anticipated outcomes of the consultation or areas for improved coordination?	Spoke with Aldermen Bob Brinson, Bobby Aster, Johnny Ray Kinsey, and Hazel Royal in separate video meetings. Anticipated outcomes include cooperation between the legislative and executive branches of the City government, increased citizen participation in government, and greater awareness of housing problems in the City.

<p>3. Agency/Group/Organization</p>	<p>New Bern Fire Department</p>
<p>Agency/Group/Organization Type</p>	<p>Services-Health Services-Victims Agency-Emergency Management Other government-Local</p>
<p>What section of the Plan was addressed by Consultation?</p>	<p>Housing Need Assessment Non-Homeless Special Needs Other-Community Development Strategy Other-Public Safety</p>
<p>How was the Agency/Group/Organization consulted and what are the anticipated outcomes of the consultation or areas for improved coordination?</p>	<p>Anticipated outcomes include coordination on public safety.</p>
<p>4. Agency/Group/Organization</p>	<p>New Bern Police Department</p>
<p>Agency/Group/Organization Type</p>	<p>Services-Victims of Domestic Violence Services-Victims Agency-Emergency Management Other government-Local</p>
<p>What section of the Plan was addressed by Consultation?</p>	<p>Homelessness Needs – Chronically homeless Homelessness Needs – Unaccompanied Youth Non-Homeless Special Needs Other-Community Development Strategy Other-Public Safety</p>
<p>How was the Agency/Group/Organization consulted and what are the anticipated outcomes of the consultation or areas for improved coordination?</p>	<p>Anticipated outcomes include coordination on public safety.</p>
<p>5. Agency/Group/Organization</p>	<p>New Bern Department of Public Works</p>
<p>Agency/Group/Organization Type</p>	<p>Agency-Managing Flood Prone Areas Agency-Management of Public Land or Water Resources Other government-Local Planning organization Other-Public Works</p>

<p>What section of the Plan was addressed by Consultation?</p>	<p>Housing Needs Assessment Public Housing Needs Non-Homeless Special Needs Market Analysis Other-Community Development Strategy</p>
<p>How was the Agency/Group/Organization consulted and what are the anticipated outcomes of the consultation or areas for improved coordination?</p>	<p>Anticipated outcomes include increased ADA accessibility, improved aesthetics of residential areas, improved parks, better stormwater drainage, and coordination on blight clearance and demolition.</p>
<p>6. Agency/Group/Organization</p>	<p>City of New Bern Community Development Advisory Committee</p>
<p>Agency/Group/Organization Type</p>	<p>Other government-Local Planning organization Civic Leaders</p>
<p>What section of the Plan was addressed by Consultation?</p>	<p>Housing Need Assessment Public Housing Needs Homeless Needs-Chronically homeless Homeless Needs-Families with children Homelessness Needs-Veterans Homelessness Needs-Unaccompanied youth Homelessness Strategy Non-homeless Special Needs Market Analysis Other-Community Development Strategy Anti-poverty Strategy</p>
<p>How was the Agency/Group/Organization consulted and what are the anticipated outcomes of the consultation or areas for improved coordination?</p>	<p>Anticipated outcomes include a commitment to jointly seek sustainable development in the City, potential changes to property zoning, and opening the way to more housing construction and rehabilitation.</p>
<p>7. Agency/Group/Organization</p>	<p>Housing Authority of New Bern</p>
<p>Agency/Group/Organization Type</p>	<p>Housing PHA Services-Fair Housing Services-Housing</p>

<p>What section of the Plan was addressed by Consultation?</p> <p>How was the Agency/Group/Organization consulted and what are the anticipated outcomes of the consultation or areas for improved coordination?</p>	<p>Housing Need Assessment Public Housing Needs</p> <p>Anticipated outcomes include coordination on future housing construction, fair housing education, and the Choice Neighborhood Program.</p>
<p>8. Agency/Group/Organization</p>	<p>Twin Rivers Opportunities, Inc.</p>
<p>Agency/Group/Organization Type</p>	<p>Housing PHA Services-Housing Services-Fair Housing</p>
<p>What section of the Plan was addressed by Consultation?</p>	<p>Housing Need Assessment Public Housing Needs Homeless Needs-Chronically homeless Homeless Needs-Families with children Homelessness Needs-Veterans Homelessness Strategy Non-Homeless Special Needs Market Analysis Anti-poverty Strategy</p>
<p>How was the Agency/Group/Organization consulted and what are the anticipated outcomes of the consultation or areas for improved coordination?</p>	<p>Anticipated outcomes include increased access to affordable housing through housing development and rehabilitation, and placement of City residents into both public housing units and Section 8 Housing Choice Voucher-funded housing units.</p>
<p>9. Agency/Group/Organization</p>	<p>Craven County Schools</p>
<p>Agency/Group/Organization Type</p>	<p>Services-Children Services-Education Other government-County</p>

<p>What section of the Plan was addressed by Consultation?</p>	<p>Housing Need Assessment Public Housing Needs Homeless Needs-Families with children Homelessness Needs-Unaccompanied youth Homelessness Strategy Non-Homeless Special Needs Other-Community Development Strategy Anti-poverty Strategy</p>
<p>How was the Agency/Group/Organization consulted and what are the anticipated outcomes of the consultation or areas for improved coordination?</p>	<p>Anticipated outcomes include decreasing the financial hardship on students and their families, including reducing the rate of homelessness, and lowering paperwork barriers for students to enter school.</p>
<p>10. Agency/Group/Organization</p>	<p>Craven County Emergency Services</p>
<p>Agency/Group/Organization Type</p>	<p>Services-Health Services-Victims Services-Victims of Domestic Violence Agency-Emergency Management Other government-County</p>
<p>What section of the Plan was addressed by Consultation?</p>	<p>Housing Need Assessment Homeless Needs-Chronically homeless Homeless Needs-Families with children Homelessness Needs-Veterans Homelessness Needs-Unaccompanied youth Homelessness Strategy Non-Homeless Special Needs</p>
<p>How was the Agency/Group/Organization consulted and what are the anticipated outcomes of the consultation or areas for improved coordination?</p>	<p>Anticipated outcomes include review of disaster shelter capacity and continued collaboration with the City of New Bern’s Fire and Police departments.</p>
<p>11. Agency/Group/Organization</p>	<p>Craven Community College</p>
<p>Agency/Group/Organization Type</p>	<p>Services-Education Services-Employment Other government-County</p>

<p>What section of the Plan was addressed by Consultation?</p>	<p>Housing Needs Assessment Public Housing Needs Homeless Needs – Families with children Homelessness Needs – Unaccompanied youth Homelessness Strategy Non-Homeless Special Needs Other-Community Development Strategy Anti-poverty Strategy</p>
<p>How was the Agency/Group/Organization consulted and what are the anticipated outcomes of the consultation or areas for improved coordination?</p>	<p>Anticipated outcomes include offering assistance to homeless students or those at risk of homelessness, job training through the Volt Center, as well as the potential of offering public services at the Stanley White Center.</p>
<p>12. Agency/Group/Organization</p>	<p>North Carolina Department of Health and Human Services</p>
<p>Agency/Group/Organization Type</p>	<p>Services-Children Services-Elderly Persons Services-Persons with Disabilities Services-Persons with HIV/AIDS Services-homeless Services-Health Services-Education Publicly Funded Institution/System of Care Other government - State Regional organization Planning organization</p>
<p>What section of the Plan was addressed by Consultation?</p>	<p>Lead-based Paint Strategy Non-Homeless Special Needs Anti-poverty Strategy Community Development Strategy</p>
<p>How was the Agency/Group/Organization consulted and what are the anticipated outcomes of the consultation or areas for improved coordination?</p>	<p>NCDHHS was contacted for health and lead-based paint statistics and information.</p>
<p>13. Agency/Group/Organization</p>	<p>North Carolina DHHS Independent Living Regional Office</p>

<p>Agency/Group/Organization Type</p>	<p>Services-Elderly Persons Services-Persons with Disabilities Services-Housing Services-Health Services-Education Health Agency Publicly Funded Institution/System of Care Other government-State</p>
<p>What section of the Plan was addressed by Consultation?</p>	<p>Housing Need Assessment Public Housing Needs Non-Homeless Special Needs Anti-poverty Strategy</p>
<p>How was the Agency/Group/Organization consulted and what are the anticipated outcomes of the consultation or areas for improved coordination?</p>	<p>Comments include the need for more robust public transportation, more housing options for people with disabilities and limited income, and increased ADA accessibility in public spaces. Anticipated outcomes include a better accessible housing market for the elderly to age in place, and cooperation between the City, County and State on rehab programs.</p>
<p>14. Agency/Group/Organization</p>	<p>Neuse River Community Development Corporation</p>
<p>Agency/Group/Organization Type</p>	<p>Housing Regional organization Planning organization</p>
<p>What section of the Plan was addressed by Consultation?</p>	<p>Housing Need Assessment Public Housing Needs Homeless Needs – Chronically homeless Homeless Needs – Families with children Homelessness Needs – Veterans Homelessness Strategy Market Analysis Other-Community Development Strategy Anti-poverty Strategy</p>
<p>How was the Agency/Group/Organization consulted and what are the anticipated outcomes of the consultation or areas for improved coordination?</p>	<p>Anticipated outcomes include continued cooperation between the City and NR CDC to develop affordable housing.</p>

<p>15. Agency/Group/Organization</p>	<p>Eastern Carolina Council of Governments</p>
<p>Agency/Group/Organization Type</p>	<p>Regional organization Planning organization</p>
<p>What section of the Plan was addressed by Consultation?</p>	<p>Housing Need Assessment Homelessness Strategy Market Analysis Other-Community Development Strategy Anti-poverty Strategy</p>
<p>How was the Agency/Group/Organization consulted and what are the anticipated outcomes of the consultation or areas for improved coordination?</p>	<p>Anticipated outcomes include expansion of the ECC Human Services programs to include intergenerational services for grandparents raising grandchildren, increased economic development, and addressing health and homelessness issues.</p>
<p>16. Agency/Group/Organization</p>	<p>Coastal Women’s Shelter</p>
<p>Agency/Group/Organization Type</p>	<p>Services-Victims of Domestic Violence Services-homeless Services-Health Services-Victims</p>
<p>What section of the Plan was addressed by Consultation?</p>	<p>Housing Needs Assessment Public Housing Needs Homelessness Strategy Homeless Needs - Chronically homeless Homeless Needs - Families with children Homelessness Needs - Veterans Homelessness Needs - Unaccompanied youth Non-Homeless Special Needs Anti-Poverty Strategy</p>
<p>How was the Agency/Group/Organization consulted and what are the anticipated outcomes of the consultation or areas for improved coordination?</p>	<p>Anticipated outcomes include reduced rates of domestic violence through both direct prevention efforts and increased financial stability of residents, as well as more and better-quality shelter space and treatment options.</p>

<p>17. Agency/Group/Organization</p>	<p>Religious Community Services of New Bern</p>
<p>Agency/Group/Organization Type</p>	<p>Housing Services – Housing Services-Children Services-Elderly Persons Services-Persons with Disabilities Services-Persons with HIV/AIDS Services-Victims Services-Victims of Domestic Violence Services-Homeless</p>
<p>What section of the Plan was addressed by Consultation?</p>	<p>Housing Need Assessment Homeless Needs-Chronically homeless Homeless Needs-Families with children Homelessness Needs-Veterans Homelessness Needs-Unaccompanied youth Homelessness Strategy Non-Homeless Special Needs Anti-poverty Strategy</p>
<p>How was the Agency/Group/Organization consulted and what are the anticipated outcomes of the consultation or areas for improved coordination?</p>	<p>Anticipated outcomes include continued cooperation among the homeless shelter providers in and around New Bern, as well as collaboration on community services such as food pantries.</p>
<p>18. Agency/Group/Organization</p>	<p>The 4 Day Movement</p>
<p>Agency/Group/Organization Type</p>	<p>Services-Homeless Services-Elderly Persons Services-Persons with Disabilities Civic Leaders Other: Religious Leaders</p>
<p>What section of the Plan was addressed by Consultation?</p>	<p>Homelessness Strategy Homeless Needs - Families with children Homelessness Needs - Veterans Anti-poverty Strategy</p>

<p>How was the Agency/Group/Organization consulted and what are the anticipated outcomes of the consultation or areas for improved coordination?</p>	<p>Anticipated outcomes include increased resident access to food and clothing aid.</p>
<p>19. Agency/Group/Organization Agency/Group/Organization Type</p>	<p>United Way of Coastal Carolina Housing Services-Children Services-Elderly Persons Services-Persons with Disabilities Services-Housing Services-Employment Services-Fair Housing Regional organization</p>
<p>What section of the Plan was addressed by Consultation?</p>	<p>Housing Need Assessment Homeless Needs – Chronically homeless Homeless Needs – Families with children Homelessness Needs – Veterans Homelessness Needs – Unaccompanied youth Homelessness Strategy Other-Community Development Strategy Anti-poverty Strategy</p>
<p>How was the Agency/Group/Organization consulted and what are the anticipated outcomes of the consultation or areas for improved coordination?</p>	<p>Anticipated outcomes include continued cooperation between the United Way, other area nonprofits and agencies, and the City to address issues including affordable housing, homelessness, community and economic development, and workforce development.</p>
<p>20. Agency/Group/Organization Agency/Group/Organization Type</p>	<p>Craven Literacy Council Services-Children Services-Persons with Disabilities Services-Education Regional Organization</p>
<p>What section of the Plan was addressed by Consultation?</p>	<p>Homeless Needs – Families with children Homelessness Strategy Non-Homeless Special Needs Other-Community Development Strategy Anti-poverty Strategy</p>

<p>How was the Agency/Group/Organization consulted and what are the anticipated outcomes of the consultation or areas for improved coordination?</p>	<p>Anticipated outcomes include greater cooperation between educational organizations in the community and increased literacy in English among residents.</p>
<p>21. Agency/Group/Organization</p>	<p>MERCI Clinic</p>
<p>Agency/Group/Organization Type</p>	<p>Services-Children Services-Elderly Persons Services-Persons with Disabilities Services-Persons with HIV/AIDS Services-Victims of Domestic Violence Services-homeless Services-Health Health Agency Services – Victims Regional organization</p>
<p>What section of the Plan was addressed by Consultation?</p>	<p>Housing Need Assessment Homeless Needs-Chronically Homeless Homeless Needs-Families with children Homelessness Needs-Veterans Homelessness Needs-Unaccompanied youth Homelessness Strategy Non-Homeless Special Needs HOPWA Strategy Anti-poverty Strategy</p>
<p>How was the Agency/Group/Organization consulted and what are the anticipated outcomes of the consultation or areas for improved coordination?</p>	<p>Anticipated outcomes include better availability of healthcare for low-income and homeless City residents.</p>
<p>22. Agency/Group/Organization</p>	<p>The ARC of North Carolina</p>
<p>Agency/Group/Organization Type</p>	<p>Services-Persons with Disabilities Services-Health Child Welfare Agency Regional organization</p>

<p>What section of the Plan was addressed by Consultation?</p>	<p>Housing Need Assessment Homeless Needs - Chronically homeless Homeless Needs - Families with children Homelessness Needs - Veterans Homelessness Needs - Unaccompanied youth Non-Homeless Special Needs Anti-poverty Strategy</p>
<p>How was the Agency/Group/Organization consulted and what are the anticipated outcomes of the consultation or areas for improved coordination?</p>	<p>Anticipated outcomes include better housing security for disabled persons served by the ARC.</p>
<p>23. Agency/Group/Organization Agency/Group/Organization Type</p>	<p>The Salvation Army of New Bern</p> <p>Services-Children Services-Elderly Persons Services-Persons with Disabilities Services-Victims Services-Victims of Domestic Violence Services-Homeless Services-Housing Services-Employment Regional organization Civic Leaders</p>
<p>What section of the Plan was addressed by Consultation?</p>	<p>Housing Need Assessment Homeless Needs - Chronically homeless Homeless Needs - Families with children Homelessness Needs - Veterans Homelessness Needs - Unaccompanied youth Homelessness Strategy Non-Homeless Special Needs</p>
<p>How was the Agency/Group/Organization consulted and what are the anticipated outcomes of the consultation or areas for improved coordination?</p>	<p>Anticipated outcomes include continued coordination between SA and local shelters, increased shelter space and assistance to shelter clients, and advocacy for increasing the availability of housing.</p>

<p>24. Agency/Group/Organization</p>	<p>Interfaith Refugee Ministries</p>
<p>Agency/Group/Organization Type</p>	<p>Housing Services - Housing Services-homeless Services-Victims Services-Employment Regional organization</p>
<p>What section of the Plan was addressed by Consultation?</p>	<p>Housing Need Assessment Homelessness Strategy Homeless Needs - Chronically homeless Homeless Needs - Families with children Homelessness Needs - Veterans Homelessness Needs - Unaccompanied youth Non-Homeless Special Needs Anti-poverty Strategy</p>
<p>How was the Agency/Group/Organization consulted and what are the anticipated outcomes of the consultation or areas for improved coordination?</p>	<p>Anticipated outcomes include helping refugees put down roots in Craven County, easing unrealistic financial expectations for rental applicants, creating workforce opportunities for immigrants, reducing language barriers, and matching immigrants with aid programs.</p>
<p>25. Agency/Group/Organization</p>	<p>LYFE Three, Inc.</p>
<p>Agency/Group/Organization Type</p>	<p>Services-Children Services-Education Regional organization</p>
<p>What section of the Plan was addressed by Consultation?</p>	<p>Housing Need Assessment Homeless Needs-Families with children Homelessness Needs-Unaccompanied youth Homelessness Strategy Non-Homeless Special Needs Other-Community Development Strategy Anti-poverty Strategy</p>
<p>How was the Agency/Group/Organization consulted and what are the anticipated outcomes of the consultation or areas for improved coordination?</p>	<p>Virtual meeting. Anticipated outcomes include cooperation between educational organizations and the City, more after-school activities, and better public facilities for children and families.</p>

<p>26. Agency/Group/Organization</p>	<p>Legal Aid of North Carolina – Greenville Office</p>
<p>Agency/Group/Organization Type</p>	<p>Services-Persons with Disabilities Services-Victims Services-Victims of Domestic Violence Services-Fair Housing Regional organization</p>
<p>What section of the Plan was addressed by Consultation?</p>	<p>Housing Need Assessment Public Housing Needs Homelessness Strategy Non-Homeless Special Needs</p>
<p>How was the Agency/Group/Organization consulted and what are the anticipated outcomes of the consultation or areas for improved coordination?</p>	<p>Anticipated outcomes include more access to legal services for City residents, fewer violations of renters' rights or evictions and decreased financial stress on the elderly.</p>
<p>27. Agency/Group/Organization</p>	<p>Boys & Girls Club of the Coastal Plain</p>
<p>Agency/Group/Organization Type</p>	<p>Services-Children Services-Homeless Services-Education Regional organization Civic Leaders</p>
<p>What section of the Plan was addressed by Consultation?</p>	<p>Housing Need Assessment Public Housing Needs Homeless Needs – Families with children Homelessness Needs – Unaccompanied youth Homelessness Strategy Non-Homeless Special Needs Other-Community Development Strategy Anti-poverty Strategy</p>
<p>How was the Agency/Group/Organization consulted and what are the anticipated outcomes of the consultation or areas for improved coordination?</p>	<p>Anticipated outcomes include increased cooperation between agencies, organizations, and the City to reduce school absenteeism, decrease poverty, and increase housing stability.</p>
<p>Agency/Group/Organization</p>	<p>Habitat for Humanity of Craven County</p>

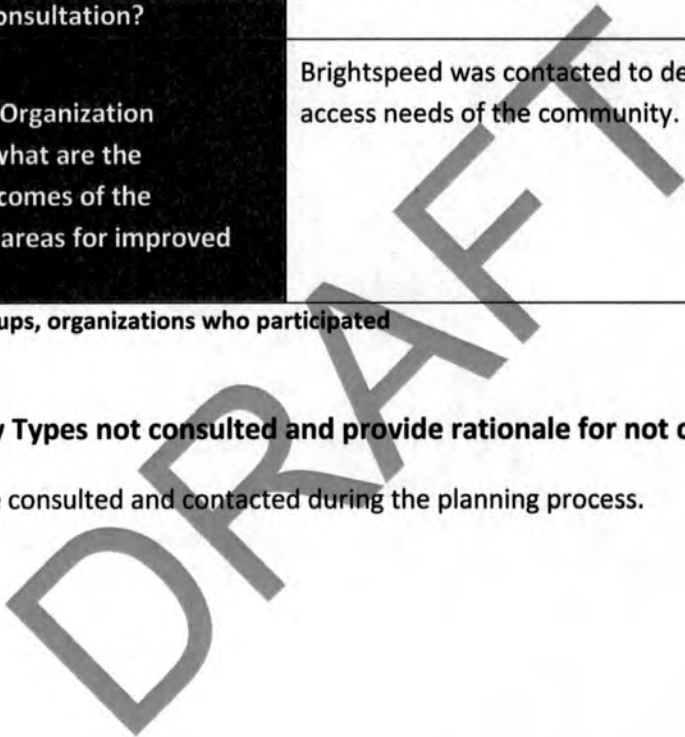
<p>28. Agency/Group/Organization Type</p>	<p>Housing Services-Housing Regional organization</p>
<p>What section of the Plan was addressed by Consultation?</p>	<p>Housing Need Assessment Public Housing Needs Homeless Needs-Chronically homeless Homeless Needs-Families with children Homeless Needs-Veterans Homelessness Strategy Market Analysis Anti-poverty Strategy</p>
<p>How was the Agency/Group/Organization consulted and what are the anticipated outcomes of the consultation or areas for improved coordination?</p>	<p>Anticipated outcomes include continued cooperation with the City and housing providers in New Bern to construct and rehabilitate housing for low-income homebuyers.</p>
<p>29. Agency/Group/Organization</p>	<p>Optimum</p>
<p>Agency/Group/Organization Type</p>	<p>Services - Broadband Internet Service Providers Services - Narrowing the Digital Divide</p>
<p>What section of the Plan was addressed by Consultation?</p>	<p>Broadband Strategy</p>
<p>How was the Agency/Group/Organization consulted and what are the anticipated outcomes of the consultation or areas for improved coordination?</p>	<p>Optimum was contacted to determine the broadband access needs of the community.</p>
<p>30. Agency/Group/Organization</p>	<p>Spectrum</p>
<p>Agency/Group/Organization Type</p>	<p>Services - Broadband Internet Service Providers Services - Narrowing the Digital Divide</p>
<p>What section of the Plan was addressed by Consultation?</p>	<p>Broadband Strategy</p>

<p>How was the Agency/Group/Organization consulted and what are the anticipated outcomes of the consultation or areas for improved coordination?</p>	<p>Spectrum was contacted to determine the broadband access needs of the community.</p>
<p>31. Agency/Group/Organization</p>	<p>Brightspeed</p>
<p>Agency/Group/Organization Type</p>	<p>Services - Broadband Internet Service Providers Services - Narrowing the Digital Divide</p>
<p>What section of the Plan was addressed by Consultation?</p>	<p>Broadband Strategy</p>
<p>How was the Agency/Group/Organization consulted and what are the anticipated outcomes of the consultation or areas for improved coordination?</p>	<p>Brightspeed was contacted to determine the broadband access needs of the community.</p>

Table 2 – Agencies, groups, organizations who participated

Identify any Agency Types not consulted and provide rationale for not consulting

All agency types were consulted and contacted during the planning process.



Other local/regional/state/federal planning efforts considered when preparing the Plan

Name of Plan	Lead Organization	How do the goals of your Strategic Plan overlap with the goals of each plan?
Continuum of Care	Housing Alliance of Coastal Carolina	They are incorporated in the Five Year Consolidated Plan and the Annual Action Plans.
Annual and Five Year Capital Plans	The Housing Authority of New Bern	The Housing Authority of the City of New Bern is the lead agency providing public housing assistance in the City of New Bern. The goals of the City and the Housing Authority are complementary.
Greater Five Points Transformation Plan	City of New Bern Redevelopment Commission	They are incorporated in the Five Year Consolidated Plan and the Annual Action Plans.
The New Bern Gateway Renaissance Plan	City of New Bern Redevelopment Commission	They are incorporated in the Five Year Consolidated Plan and the Annual Action Plans.
Emergency Management Plan	Craven County Emergency Manager	They are incorporated in the Five Year Consolidated Plan and the Annual Action Plans.
State Broadband Plan	North Carolina Department of Information Technology	They are incorporated in the Five Year Consolidated Plan and the Annual Action Plans.

Table 3 – Other local / regional / federal planning efforts

Describe cooperation and coordination with other public entities, including the State and any adjacent units of general local government, in the implementation of the Consolidated Plan (91.215(l))

The City of New Bern’s Department of Development Services’ Economic and Community Development Office is the administrating agency for the CDBG program. Close coordination is maintained with other City departments such as the Public Works, Parks & Recreation, Public Utilities, Administration, Police and Fire Departments, the City of New Bern Housing Authority, Twin Rivers Opportunities, Inc., and the City of New Bern Redevelopment Commission, as well as County departments such as the Eastern Carolina Council, Craven County Economic Development, Craven County Schools, and the North Carolina Balance of State Continuum of Care through the Housing Alliance of Coastal Carolina. Coordination with various non-profit organizations, such as the Coastal Women’s Shelter, the Salvation Army of New Bern, Interfaith Refugee Ministries, and Craven Community College helped aid the planning process and develop priorities. The City works closely with the Craven County Commissioners and County staff to address projects and activities that extend beyond the City limits. The City and the County agencies have a good working relationship.

The North Carolina Balance of State CoC coordinates Con Planning, CoC strategic planning and ESG policies/priorities/allocations. This updated process will result in greater statewide input in identifying unmet needs, priority populations, and ESG performance standards.

PR-15 Citizen Participation – 91.105, 91.115, 91.200(c) and 91.300(c)**1. Summary of citizen participation process/Efforts made to broaden citizen participation****Summarize citizen participation process and how it impacted goal-setting**

The FY 2024-2028 Five-Year Consolidated Plan and FY 2024 Annual Action Plan have many components which try to reach out and encourage citizen participation. These components include the following:

- request for proposals for funding (RFP's) from agencies/organizations;
- interviews and roundtable discussions were held with various stakeholders;
- interviews with different City Departments
- residential surveys;
- agencies/organizations surveys;
- a needs hearing; and
- a second public hearing to gather public comments on the draft plan while it was on public display.

The City's survey forms were posted on the City's website and emailed to agencies and organizations who were invited to stakeholder meetings. The City received 57 completed resident surveys and 7 completed agency/organization surveys. The City posted the FY 2024-2028 Five-Year Consolidated Plan, FY 2024 Annual Action Plan, and the Analysis of Impediments to Fair Housing Choice on the City's website. All of these comments are included in the Five-Year Consolidated Plan, Annual Action Plan, and Analysis of Impediments to Fair Housing Choice in the Exhibit Section of this document. Through the citizen participation process, the City uses resident input to develop how the plan will serve the needs of the low- and moderate-income population to reach the goals set forth in the Five-Year Consolidated Plan.

The City has followed its approved Citizens Participation Plan to develop its Five-Year Consolidated Plan and Annual Action Plan.

Citizen Participation Outreach

Sort Order	Mode of Outreach	Target of Outreach	Summary of Response/ attendance	Summary of Comments received	Summary of comments not accepted and reasons	URL (If applicable)
1.	Newspaper Ad	-Minorities -Persons with disabilities -Non-targeted/broad community -Residents of Public and Assisted Housing -Agencies/ Organizations	None.	None.	None.	Not Applicable.
2.	Flyers	-Minorities -Persons with disabilities -Non-targeted/broad community -Residents of Public and Assisted Housing -Agencies/ Organizations	None.	None.	None.	Not Applicable.
3.	Internet Outreach	-Minorities -Persons with disabilities -Non-targeted/broad community -Residents of Public and Assisted Housing -Agencies/ Organizations	The City posted the community public hearing notice on the City's Community Development Grant Programs webpage.	None.	None.	https://www.newbernnc.gov/departments/development_services/comm dev_grant_programs.php

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4.	Public Meeting	<ul style="list-style-type: none"> -Minorities -Persons with disabilities -Non-targeted/broad community -Residents of Public and Assisted Housing -Agencies/ Organizations 	<p>The City held a community “needs” public meeting on February 26, 2024 at 6:00 PM in the City Development Services Department to discuss the City’s upcoming needs and the proposed FY 2024 Budget.</p>	<p>Meeting minutes can be found in the Consolidated Plan’s Appendix section.</p>	<p>All comments were accepted.</p>	<p>Not Applicable.</p>
5.	Live Streaming	<ul style="list-style-type: none"> -Minorities -Persons with disabilities -Non-targeted/broad community -Citywide 	<p>The City’s community “needs” public hearing was simultaneously live-streamed.</p>	<p>Meeting minutes can be found in the Consolidated Plan’s Appendix section.</p>	<p>All comments were accepted.</p>	
6.	Resident Surveys	<ul style="list-style-type: none"> -Minorities -Persons with disabilities -Non-targeted/broad community -Residents of Public and Assisted Housing -Citywide 	<p>A digital Resident Survey was made available on the City’s website, social media outlets, and through email to stakeholder organizations and agencies. It was also distributed in printed form at City Hall, the Craven County Public Library, the New Bern Housing Authority main office and housing facilities, and via stakeholders to their clients and residents.</p>	<p>The City received 57 resident surveys. The tabulations of the Resident Surveys can be found in the Five Year Consolidated Plan’s Exhibit section.</p>	<p>All comments were accepted.</p>	<p>https://www.surveymonkey.com/r/NewBernCDBG-2024-2028</p>

7.	Agency & Organization Surveys	<ul style="list-style-type: none"> -Minorities -Persons with disabilities -Non-targeted/broad community -Residents of Public and Assisted Housing -Agencies/ Organizations 	An Agency Survey was emailed to stakeholders in order to solicit their feedback about community needs. Seven (7) surveys were completed and returned.	A summary of the survey responses can be found in the Five Year Consolidated Plan's Appendix section.	All comments were accepted.	Not Applicable.
8.	Stakeholder Meetings	<ul style="list-style-type: none"> -Minorities -Persons with disabilities -Non-targeted/broad community -Residents of Public and Assisted Housing -Agencies/ Organizations 	The City met with 17 agencies & organizations as part of its stakeholder roundtables and individual meetings.	A summary of the meeting minutes can be found in the Five Year Consolidated Plan's Appendix section.	All comments were accepted.	Not Applicable.
9.	Newspaper Ad	<ul style="list-style-type: none"> -Minorities -Persons with disabilities -Non-targeted/broad community -Residents of Public and Assisted Housing -Agencies/ Organizations 	None.	None.	None.	Not Applicable.

10.	Internet Outreach	<ul style="list-style-type: none"> -Minorities -Persons with disabilities -Non-targeted/broad community -Residents of Public and Assisted Housing -Agencies/ Organizations 	<p>The City posted the Final Public Hearing Notice on the City’s Community Development Grant Programs webpage, as well as a notification that the FY 2024-2028 Five Year Consolidated Plan, FY 2024 Annual Action Plan, and Analysis of Impediments to Fair Housing were on public display for 30 days.</p>	None.	None.	<p>https://www.newbernc.gov/departments/development_services/comm_dev_grant_programs.php</p>
11.	Public Meeting	<ul style="list-style-type: none"> -Minorities -Persons with disabilities -Non-targeted/broad community -Residents of Public and Assisted Housing -Agencies/ Organizations 	<p>The Public Hearing was held on Tuesday, June 25, 2024 at 6:00 PM the City’s Development Services Department.</p>	<p>A summary of the meeting minutes can be found in the Five Year Consolidated Plan’s Appendix section.</p>	<p>All comments were accepted.</p>	<p>Not Applicable.</p>

Table 4 – Citizen Participation Outreach

Needs Assessment

NA-05 Overview

Needs Assessment Overview

The City of New Bern used the HUD Comprehensive Housing Affordability Strategy (CHAS) data, which provides statistical data on housing needs, to prepare its estimates and projections. The tables in this section have been prepopulated with HUD data sets, based on the American Community Survey (ACS) 2016-2020 Five Year Estimates, and the 2000 U.S. Census. This data is the most current information available to assess housing needs, homeless needs, special needs, social service needs, economic development needs, etc.

New Bern is part of the North Carolina-Balance of State Continuum of Care. The City of New Bern is a member of Region 13 of the CoC. Data for the development for the homeless needs section was obtained from consultation with the CoC and member agencies that serve the City of New Bern, such as Religious Community Services and Coastal Women's Shelter.

Additional needs for the City of New Bern were obtained from input and interviews with various social service agencies, housing providers, City staff, and survey responses.

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NA-10 Housing Needs Assessment - 24 CFR 91.205 (a,b,c)

Summary of Housing Needs

Based on a comparison between the 2009 and 2020 population, the City of New Bern had a 1% decrease in its population. The population decrease was 230 persons, but the housing supply increased by 920 households. The median income of the area increased by 5% from \$41,148 to \$43,406. This increase in median income represents a change in nominal dollars and not a change in real dollars. In order to calculate the change in real dollars, the Consumer Price Index is used to calculate the inflation rate for a given period. Between 2009 and 2020, the cumulative inflation rate was approximately 20.64%, meaning that the \$41,148 median income in 2009 would be \$49,640 if it were expressed in terms of 2020 dollars. By taking into consideration the rate of inflation, the median income in New Bern has not kept up with the rate of inflation.

In speaking with stakeholders and residents, housing costs were regularly cited as the biggest issue facing the community. Low-income renters say they're having trouble affording to stay in the city and owner-occupied housing units are being bought by incoming retirees, leading to rising housing costs despite the median income barely changing. Among the existing housing units, many are in deplorable condition and are also located in a floodplain, leading to severe flooding during Hurricane Florence in 2017, as well as other hurricanes and flooding likely to happen in the future.

Demographics	Base Year: 2009	Most Recent Year: 2020	% Change
Population	30,215	29,985	-1%
Households	12,745	13,665	7%
Median Income	\$41,148.00	\$43,406.00	5%

Table 5 - Housing Needs Assessment Demographics

Data Source: 2000 Census (Base Year), 2016-2020 ACS (Most Recent Year)

Number of Households Table

	0-30% HAMFI	>30-50% HAMFI	>50-80% HAMFI	>80-100% HAMFI	>100% HAMFI
Total Households	2,065	2,080	2,655	1,245	5,610
Small Family Households	470	590	770	520	2,209
Large Family Households	165	330	75	80	520
Household contains at least one person 62-74 years of age	620	355	810	225	1,690
Household contains at least one person age 75 or older	285	350	660	210	540
Households with one or more children 6 years old or younger	384	500	285	90	465

Table 6 - Total Households Table

Data Source: 2016-2020 CHAS

Housing Needs Summary Tables

1. Housing Problems (Households with one of the listed needs)

	Renter					Owner				
	0-30% AMI	>30-50% AMI	>50-80% AMI	>80-100% AMI	Total	0-30% AMI	>30-50% AMI	>50-80% AMI	>80-100% AMI	Total
NUMBER OF HOUSEHOLDS										
Substandard Housing - Lacking complete plumbing or kitchen facilities	210	0	10	0	220	25	0	0	0	25
Severely Overcrowded - With >1.51 people per room (and complete kitchen and plumbing)	70	0	15	0	85	0	15	0	0	15
Overcrowded - With 1.01-1.5 people per room (and none of the above problems)	40	145	45	0	230	0	60	4	80	144
Housing cost burden greater than 50% of income (and none of the above problems)	640	424	40	0	1,104	460	280	60	20	820

	Renter					Owner				
	0-30% AMI	>30-50% AMI	>50-80% AMI	>80-100% AMI	Total	0-30% AMI	>30-50% AMI	>50-80% AMI	>80-100% AMI	Total
Housing cost burden greater than 30% of income (and none of the above problems)	170	440	505	50	1,165	35	185	630	120	970
Zero/negative Income (and none of the above problems)	140	0	0	0	140	60	0	0	0	60

Table 7 – Housing Problems Table

Data Source: 2016-2020 CHAS

2. Housing Problems 2 (Households with one or more Severe Housing Problems: Lacks kitchen or complete plumbing, severe overcrowding, severe cost burden)

	Renter					Owner				
	0-30% AMI	>30-50% AMI	>50-80% AMI	>80-100% AMI	Total	0-30% AMI	>30-50% AMI	>50-80% AMI	>80-100% AMI	Total
NUMBER OF HOUSEHOLDS										
Having 1 or more of four housing problems	960	564	105	0	1,629	480	355	65	100	1,000
Having none of four housing problems	525	765	1,180	550	3,020	95	400	1,295	600	2,390
Household has negative income, but none of the other housing problems	0	0	0	0	0	0	0	0	0	0

Table 8 – Housing Problems 2

Data Source: 2016-2020 CHAS

3. Cost Burden > 30%

	Renter				Owner			
	0-30% AMI	>30-50% AMI	>50-80% AMI	Total	0-30% AMI	>30-50% AMI	>50-80% AMI	Total
NUMBER OF HOUSEHOLDS								
Small Related	220	325	165	710	95	165	90	350
Large Related	155	40	0	195	0	35	0	35
Elderly	540	228	80	848	250	200	544	994
Other	210	270	305	785	175	65	45	285
Total need by income	1,125	863	550	2,538	520	465	679	1,664

Table 9 – Cost Burden > 30%

Data 2016-2020 CHAS
Source:

4. Cost Burden > 50%

	Renter				Owner			
	0-30% AMI	>30-50% AMI	>50-80% AMI	Total	0-30% AMI	>30-50% AMI	>50-80% AMI	Total
NUMBER OF HOUSEHOLDS								
Small Related	0	0	125	125	95	95	0	190
Large Related	0	0	40	40	0	0	0	0
Elderly	450	83	10	543	215	150	39	404
Other	0	145	170	315	175	0	0	175
Total need by income	450	228	345	1,023	485	245	39	769

Table 10 – Cost Burden > 50%

Data 2016-2020 CHAS
Source:

5. Crowding (More than one person per room)

	Renter					Owner				
	0-30% AMI	>30-50% AMI	>50-80% AMI	>80-100% AMI	Total	0-30% AMI	>30-50% AMI	>50-80% AMI	>80-100% AMI	Total
NUMBER OF HOUSEHOLDS										
Single family households	110	145	15	0	270	0	75	4	80	159

	Renter					Owner				
	0-30% AMI	>30-50% AMI	>50-80% AMI	>80-100% AMI	Total	0-30% AMI	>30-50% AMI	>50-80% AMI	>80-100% AMI	Total
Multiple, unrelated family households	0	0	45	0	45	0	0	0	0	0
Other, non-family households	0	0	0	0	0	0	0	0	0	0
Total need by income	110	145	60	0	315	0	75	4	80	159

Table 11 – Crowding Information – 1/2

Data Source: 2016-2020 CHAS

	Renter				Owner			
	0-30% AMI	>30-50% AMI	>50-80% AMI	Total	0-30% AMI	>30-50% AMI	>50-80% AMI	Total
Households with Children Present								

Table 12 – Crowding Information – 2/2

Describe the number and type of single person households in need of housing assistance.

According to the 2018-2022 American Community Survey (ACS), there were 14,182 households in 2022 in the City of New Bern. Based on this number of households, 5,126 (36.1%) of all households were single person households living alone. Single person households aged 65 and over comprised 5,016 households or (35.4%) of all households. Based on the ACS estimates, 53.5% of all persons living alone are seniors, and it is presumed that as they age in place, additional accommodations and supportive services will be necessary for this portion of the City’s population. The City will need to assist in obtaining funding and collaborating with housing services and elderly support agencies to provide programs, activities, and accommodations for its growing elderly population.

Of the 195 households on the public housing waiting list according to the New Bern Housing Authority as of April 1, 2024 (last waiting list available), 99, or 50.8%, applied for 2-bedroom units and 85, or 43.6%, applied for 3-bedroom units. This shows that there is a shortage of subsidized, affordable housing for family households.

In New Bern Towers, there were 26 households on the waiting list according to the New Bern Housing Authority as of April 22, 2024 (last waiting list available). On this list, 24, or 92.3% applied for 1-bedroom

units. This shows that there is a shortage of subsidized, affordable housing for the elderly, near-elderly, and disabled. Many of those in the elderly or disabled populations are on fixed incomes.

Estimate the number and type of families in need of housing assistance who are disabled or victims of domestic violence, dating violence, sexual assault and stalking.

Disabled Population – Based on the 2016-2020 CHAS Data and the 2018-2022 ACS Data, it is estimated that the disabled population of the City of New Bern is 15.1%, and about 71.4% of the elderly in the City are disabled. A breakdown of the types of disability (of the total civilian noninstitutionalized population in New Bern) is as follows: hearing difficulty = 4.6%; vision difficulty = 2.6%; cognitive difficulty = 6.4%; ambulatory difficulty = 8.1%; self-care difficulty = 3.9%; and independent living difficulty = 6.4%.

Victims of Domestic Violence, Dating Violence, sexual assault, and stalking – The Coastal Women’s Shelter serves victims of domestic violence, dating violence, sexual assault, and stalking in the City of New Bern and Craven County. They also provide shelters for men or other survivors.

The Coastal Women’s Shelter prioritizes providing safe, affordable housing for victims of domestic violence. The shelter has 16 total beds. The Coastal Women’s Shelter will work with trusted landlords to place people in housing, but there is a shortage of trusted landlords.

Domestic violence survivors have additional needs beyond housing. These needed services include transportation, employment, and job training. Additionally, those displaced by domestic violence issues with children will be forced to move their children to other schools, which is a disruption in their education.

What are the most common housing problems?

The largest housing problem in the City of New Bern is housing affordability. According to the 2018-2022 ACS data, an estimated 48.4% of all renter households are cost overburdened by 30% or more, and an estimated 24.2% of all owner households are cost overburdened by 30% or more. Approximately 30.5% of owner-occupied households with a mortgage are cost overburdened by 30% or more, compared to only 14.5% of owner occupied households without a mortgage.

In consultations, interviews and surveys, the lack of affordable, accessible housing for the residents of the area is a problem. The lack of affordable housing was exacerbated by Hurricane Florence, which damaged many of the affordable units in the floodplain to the point of being uninhabitable. Many residents must make costly repairs to their houses which they cannot afford. Various social services, housing agencies, homeless providers, and economic development agencies have stressed the impact of the damage from Hurricane Florence on the City and its older housing stock, and the need to either make costly repairs or

construct new housing. The housing situation since the Covid-19 pandemic has mirrored national trends, with housing prices and inflation rising, making residents struggle further to find affordable housing.

Much of the existing housing in the City is old and inefficient. Utility costs are high because of poor insulation and inefficient HVAC. Like other problems in the City, these issues increased because of Hurricane Florence and will continue to affect the community with future flooding.

Are any populations/household types more affected than others by these problems?

Single-person households, such as the elderly and disabled, Black or African American households, and immigrant family households in New Bern are the most affected by the lack of affordable, accessible housing. The elderly and disabled are often on fixed or limited incomes. The lack of affordable housing that is decent, safe, sound, and accessible forces them into housing that does not meet these standards. The City of New Bern has created a Redevelopment Area in the part of the City where many of these families live, with the intent of assisting low- and moderate-income people to attain affordable, accessible housing and services.

Another group affected by the lack of affordable housing is the homeless and persons at-risk of becoming homeless, including persons who are victims of domestic violence. Much of the population, which is at-risk of becoming homeless, is facing a housing cost overburden problem, and would benefit from emergency housing assistance for rent, emergency rehabilitations, and/or mortgage payments and utilities to help them avoid eviction or foreclosures. There are short term assistance options available, but these are scarce and hard to come by, especially if it is needed by the same person more than once. People transitioning from shelter care, prison, or a health care facility are also affected by the cost overburden housing problem, particularly when trying to secure a source of income to maintain housing.

Describe the characteristics and needs of Low-income individuals and families with children (especially extremely low-income) who are currently housed but are at imminent risk of either residing in shelters or becoming unsheltered 91.205(c)/91.305(c)). Also discuss the needs of formerly homeless families and individuals who are receiving rapid re-housing assistance and are nearing the termination of that assistance

According to the area homeless service providers, characteristics and needs of both low-income individuals and families with children who receive services in Craven County are as follows:

Individuals: Mental Health issues; criminal histories which severely limit job opportunities; lack of sustainable living wages and skills for available jobs; a lack of transportation; a lack of quality affordable medical care; substance abuse issues; and those that formerly had housing but were displaced by Hurricane Florence and the Covid-19 Pandemic.

Families with Children: Single mothers with an average of 2.5 children; no means of transportation; lack of affordable childcare; a lack of education; a lack of job skills; evictions; unemployed, or underemployed in a low paying job that cannot sustain a family with one income; a lack of quality affordable medical care; substance abuse issues; and those that formerly had housing but were displaced by Hurricane Florence and the Covid-19 Pandemic.

Formerly Homeless Individuals / Families Receiving Rapid Re-Housing Assistance Nearing Termination: The CoC encourages these individuals to contribute to the CoC decision-making process through events such as Project Connect to develop strategies to target this group. The CoC increased its funding and state ESG funding of Rapid Rehousing programs and homeless prevention programs to target these groups.

Specific needs of former homeless individuals and families receiving rapid re-housing include: affordable and decent housing; job training; and affordable medical care.

According to the NC Balance of State CoC Application for 2018, the CoC restructured its board to greater represent the diverse groups that make up the homeless population. The CoC utilizes Coordinated Entry to track the various subpopulations and divides them up into 13 local referral zones across the 79 counties that the CoC serves. Much of the area served by the CoC is rural, and the CoC has created advertisements and hotlines to target these subpopulations which allows them to access the Coordinated Entry process.

If a jurisdiction provides estimates of the at-risk population(s), it should also include a description of the operational definition of the at-risk group and the methodology used to generate the estimates:

The McKinney-Vento Act established categories in the Homeless Definition Final Rule for the At Risk Group. The Act was amended to include assistance to those at risk of becoming homeless who did not meet the definition in the Final Rule. These include: 1) individuals and families; 2) unaccompanied children and youth and; 3) families with children and youth.

According to the CoC, the methodology used to generate estimates is based on historical incidence, such as the yearly Point In Time (PIT) Counts and Homeless Management Information System (HMIS) data, which is a local information technology system used to collect client-level data on the provision of housing and services to homeless individuals and families and persons at risk of becoming homeless. The NC Balance of State CoC has adopted the HUD definitions of homelessness. Included in these definitions are two types of at-risk groups: persons that are imminently in danger of losing their housing; and those who are housed in unstable units and are at risk of losing their housing.

Imminently losing their housing - Persons who are housed but are at imminent risk of losing housing include people who at program entry or program exit are experiencing one of the following:

- Being evicted from a private dwelling unit (including housing provided by family/friends).
- Being discharged from a hospital or other institution.

- Living in housing that has been condemned by housing inspectors and is no longer considered safe for human habitation.

Additionally, a person residing in one of these places must also meet the following two conditions:

- Have no appropriate subsequent housing options identified; AND
- Lack the financial resources and support networks needed to obtain immediate housing or remain in their existing housing.

Unstable housed and at-risk of losing their housing - persons who are housed and are at-risk of losing housing include people who at program entry or program exit:

- Are in their own housing or doubled up with friends or relatives and are at-risk of losing their housing due to high housing costs, conflict, or other conditions negatively impacting their ability to remain housed; AND
- Lack the resources and support networks needed to maintain or obtain housing.

Specify particular housing characteristics that have been linked with instability and an increased risk of homelessness

The high cost of decent, safe, sound, and affordable housing in the City creates instability and an increased risk of homelessness for lower income families in the area. Many families are living from paycheck to paycheck and are paying over 30% of their income for housing, which may or may not be decent, safe, sound, and affordable, as housing costs in the region mirror nationwide trends towards increasing housing costs.

Contributing housing characteristics which contribute to instability and increased risk of homelessness include: untreated/undiagnosed mental health issues; substance abuse issues; physical disabilities, rendering a person unable to work, but not receiving Social Security Disability benefits; single and unemployed mothers expecting another child; domestic violence, poor rental and credit issues; and unemployed, often troubled, young adults aging out of foster care, who are made to leave the home by the foster parents.

In New Bern, natural disasters such as flooding pose an additional threat to stability for those at an increased risk of homelessness. Many of the neighborhoods with the highest concentrations of low- and moderate-income persons are most likely cost overburdened and live in the 100-year floodplain.

Discussion

The population of New Bern is increasing, and many residents are facing the effects of rising housing costs and a shortage of decent, safe, sound, and affordable housing.

NA-15 Disproportionately Greater Need: Housing Problems – 91.205 (b)(2)

Assess the need of any racial or ethnic group that has disproportionately greater need in comparison to the needs of that category of need as a whole.

Introduction

During the planning process for the preparation of the City of New Bern’s Five Year Consolidated Plan, an evaluation and comparison was made to determine if any racial or ethnic group has a greater disproportionate need in the City. Disproportionately greater need is defined as a group having at least 10 percentage points higher than the percentage of persons as a whole. According to the 2016-2020 American Community Survey, The total number of White Households in the City of New Bern is 8,509 households (65.5%); the number of Black/African American Households is 4,149 households (32.0%); the number of American Indian and Alaska Native is 44 households (0.3%), the number of Asian Households is 499 households (3.8%); the number of Native Hawaiian and Other Pacific Islander is 0 households (0.0%), and the number of Hispanic Households is 649 households (5.0%).

0%-30% of Area Median Income

Housing Problems	Has one or more of four housing problems	Has none of the four housing problems	Household has no/negative income, but none of the other housing problems
Jurisdiction as a whole	1,240	420	80
White	420	155	35
Black / African American	690	265	45
Asian	55	0	0
American Indian, Alaska Native	0	0	0
Pacific Islander	0	0	0
Hispanic	40	0	0

Table 13 - Disproportionally Greater Need 0 - 30% AMI

Data 2016-2020 CHAS
Source:

**The four housing problems are:*

1. Lacks complete kitchen facilities,
2. Lacks complete plumbing facilities,
3. More than one person per room,
4. Cost Burden greater than 30%

30%-50% of Area Median Income

Housing Problems	Has one or more of four housing problems	Has none of the four housing problems	Household has no/negative income, but none of the other housing problems
Jurisdiction as a whole	1,275	385	0
White	465	155	0
Black / African American	605	230	0
Asian	130	0	0
American Indian, Alaska Native	0	0	0
Pacific Islander	0	0	0
Hispanic	20	0	0

Table 14 - Disproportionally Greater Need 30 - 50% AMI

Data 2016-2020 CHAS
Source:

**The four housing problems are:*

1. Lacks complete kitchen facilities,
2. Lacks complete plumbing facilities,
3. More than one person per room,
4. Cost Burden greater than 30%

50%-80% of Area Median Income

Housing Problems	Has one or more of four housing problems	Has none of the four housing problems	Household has no/negative income, but none of the other housing problems
Jurisdiction as a whole	1,360	725	0
White	785	350	0
Black / African American	360	270	0
Asian	65	0	0
American Indian, Alaska Native	10	0	0
Pacific Islander	0	0	0
Hispanic	130	80	0

Table 15 - Disproportionally Greater Need 50 - 80% AMI

Data 2016-2020 CHAS
Source:

**The four housing problems are:*

1. Lacks complete kitchen facilities,
2. Lacks complete plumbing facilities,
3. More than one person per room,
4. Cost Burden greater than 30%

80%-100% of Area Median Income

Housing Problems	Has one or more of four housing problems	Has none of the four housing problems	Household has no/negative income, but none of the other housing problems
Jurisdiction as a whole	445	1,035	0
White	245	560	0
Black / African American	75	285	0
Asian	45	30	0
American Indian, Alaska Native	0	0	0
Pacific Islander	0	0	0
Hispanic	85	140	0

Table 16 - Disproportionally Greater Need 80 - 100% AMI

Data 2016-2020 CHAS
Source:

**The four housing problems are:*

1. Lacks complete kitchen facilities,
2. Lacks complete plumbing facilities,
3. More than one person per room,
4. Cost Burden greater than 30%

Discussion

The racial composition of households in the City of New Bern, according to the 2016-2020 American Community Survey, was 65.5% White; 31.9% African American/Black; 3.8% Asian; and 0.34% American Indian. The Hispanic or Latino population was 5.0%. In the 0%-30% of Area Median Income category, African American/Black households had one or more housing problems, with a disproportionate need at 55.6%. Also, in the 30%-50% of Area Median Income category, African American/Black households had one or more housing problems, with a disproportionate need at 47.5%.

Also of note are the groups of Asian households at 30%-50% of Area Median Income, with 26.1% of all Asian households in New Bern having one or more housing problems in this income category. The Hispanic or Latino population also had a notable need in terms of housing problems in the 50-80% of Area Median Income category at 9.6% of total households in that category. Though these groups do not meet the ten percentage point threshold for disproportionate need, they are notably higher than the proportions of the population in the City as a whole.

NA-20 Disproportionately Greater Need: Severe Housing Problems – 91.205 (b)(2)

Assess the need of any racial or ethnic group that has disproportionately greater need in comparison to the needs of that category of need as a whole.

Introduction

During the planning process for the preparation of the City of New Bern’s Five Year Consolidated Plan, an evaluation and comparison was made to determine if any racial or ethnic group is disproportionately affected by severe housing problems in the City. Disproportionately greater need is defined as a group having at least 10 percentage points higher than the percentage of persons as a whole. Severe housing problems are distinguished from housing problems by a threshold of more than 1.5 persons per room as opposed to more than 1 persons per room for overcrowding, as well as a cost burden threshold of over 50% of income as opposed to over 30% of income. Data detailing information by racial group and Hispanic origin has been compiled from the 2016-2020 CHAS data and the 2016-2020 American Community Survey Five Year Estimates. The following tables illustrate the disproportionate needs of specific groups living in the City of New Bern.

0%-30% of Area Median Income

Severe Housing Problems*	Has one or more of four housing problems	Has none of the four housing problems	Household has no/negative income, but none of the other housing problems
Jurisdiction as a whole	940	725	80
White	285	300	35
Black / African American	535	420	45
Asian	55	0	0
American Indian, Alaska Native	0	0	0
Pacific Islander	0	0	0
Hispanic	35	4	0

Table 17 – Severe Housing Problems 0 - 30% AMI

Data Source: 2016-2020 CHAS

**The four severe housing problems are:*

- 1. Lacks complete kitchen facilities,*
- 2. Lacks complete plumbing facilities,*
- 3. More than 1.5 persons per room,*
- 4. Cost Burden over 50%*

30%-50% of Area Median Income

Severe Housing Problems*	Has one or more of four housing problems	Has none of the four housing problems	Household has no/negative income, but none of the other housing problems
Jurisdiction as a whole	740	915	0
White	290	330	0
Black / African American	295	540	0
Asian	105	30	0
American Indian, Alaska Native	0	0	0
Pacific Islander	0	0	0
Hispanic	20	0	0

Table 18 – Severe Housing Problems 30 - 50% AMI

Data Source: 2016-2020 CHAS

*The four severe housing problems are:

1. Lacks complete kitchen facilities,
2. Lacks complete plumbing facilities,
3. More than 1.5 persons per room,
4. Cost Burden over 50%

50%-80% of Area Median Income

Severe Housing Problems*	Has one or more of four housing problems	Has none of the four housing problems	Household has no/negative income, but none of the other housing problems
Jurisdiction as a whole	505	1,580	0
White	260	875	0
Black / African American	145	480	0
Asian	35	30	0
American Indian, Alaska Native	0	10	0
Pacific Islander	0	0	0
Hispanic	65	145	0

Table 19 – Severe Housing Problems 50 - 80% AMI

Data Source: 2016-2020 CHAS

*The four severe housing problems are:

1. Lacks complete kitchen facilities,
2. Lacks complete plumbing facilities,
3. More than 1.5 persons per room,
4. Cost Burden over 50%

80%-100% of Area Median Income

Severe Housing Problems*	Has one or more of four housing problems	Has none of the four housing problems	Household has no/negative income, but none of the other housing problems
Jurisdiction as a whole	125	1,360	0
White	44	760	0
Black / African American	20	335	0
Asian	45	30	0
American Indian, Alaska Native	0	0	0
Pacific Islander	0	0	0
Hispanic	15	210	0

Table 20 – Severe Housing Problems 80 - 100% AMI

Data 2016-2020 CHAS
Source:

**The four severe housing problems are:*

- 1. Lacks complete kitchen facilities,*
- 2. Lacks complete plumbing facilities,*
- 3. More than 1.5 persons per room,*
- 4. Cost Burden over 50%*

Discussion

The racial composition of households in the City of New Bern, according to the 2016-2020 American Community Survey, was 65.5% White; 31.9% African American/Black; 3.8% Asian; and 0.34% American Indian. The Hispanic or Latino population was 5.0%. In the 0%-30% of Area Median Income category, the African American/Black ethnic group has a disproportionate need in terms of severe housing problems at 56.9% of the total households in that income category. The Asian population has disproportionate needs in both the 30%-50% and 80%-100% of Area Median Income categories at 14.2% and 36.0% of the total households in those income categories, respectively.

Also of note are the groups of Asian households at 0%-30% of Area Median Income, with a percentage of 5.9% of households that have one or more severe housing problems, groups of Hispanic households at 50%-80% and 80%-100% of Area Median Income, with a percentage of 12.9% and 12.0% respectively, and African American/Black households at 30%-50% with 39.9% of households that have one or more severe housing problems. Though these groups do not meet the ten-percentage point threshold for disproportionate need, they are notably higher than the proportions of the population in the City as a whole.

NA-25 Disproportionately Greater Need: Housing Cost Burdens – 91.205 (b)(2)

Assess the need of any racial or ethnic group that has disproportionately greater need in comparison to the needs of that category of need as a whole.

Introduction:

During the planning process for the preparation of the City of New Bern’s Five Year Consolidated Plan, an evaluation and comparison was made to determine if any racial or ethnic group is disproportionately affected by housing problems in the City. Disproportionately greater need is defined as a group having at least 10 percentage points higher than the percentage of persons as a whole.

The greatest housing problem facing the City of New Bern is the lack of affordable housing and the fact that many of the City’s lower income households are paying more than 30% of their total household income on housing related costs. The following information was noted: 1,355 White households were cost overburdened by 30% to 50%, and 870 White households were severely cost overburdened by greater than 50%; 910 Black/African American households were cost overburdened by 30% to 50%, and 870 Black/African American households were severely cost overburdened by greater than 50%; 60 Asian households were cost overburdened by 30% to 50%, and 75 Asian households were severely cost overburdened by greater than 50%; and lastly, 170 Hispanic households were cost overburdened by 30% to 50%, and 199 Hispanic households were severely cost overburdened by greater than 50%.

Housing Cost Burden

Housing Cost Burden	<=30%	30-50%	>50%	No / negative income (not computed)
Jurisdiction as a whole	8,265	2,545	2,075	85
White	5,420	1,355	870	35
Black / African American	2,045	910	965	45
Asian	270	60	75	0
American Indian, Alaska Native	30	10	0	0
Pacific Islander	0	0	0	0
Hispanic	445	170	99	0

Table 21 – Greater Need: Housing Cost Burdens AMI

Data Source: 2016-2020 CHAS

Discussion:

Black/African American households were disproportionately affected by a housing cost overburden in the City of New Bern. Black/African American households were considered to be severely cost overburdened,

where 46.5% of the total cases of households that were considered cost overburdened by greater than 50%. This is over ten percentage points higher than the 31.9% of the total number of households that the Black/African American category comprises. Black/African American households also made up a majority of the households with no or negative income with 52.9% of the total cases in that income category.

A total of 1,355 White households were considered cost overburdened by between 30% and 50%, which is 53.3% of the total cases of households that were considered cost overburdened by between 30% and 50%. This number is below the 65.5% of the total number of households that the White category comprises. A total of 910 Black/African American households were considered cost overburdened by between 30% and 50%, which is 35.8% of the total cases of households that were considered cost overburdened by between 30% and 50%. This number is slightly above the 31.9% of the total number of households that the Black/African American category comprises. A total of 60 Asian households were considered cost overburdened by between 30% and 50%, which is 2.4% of the total cases of households that were considered cost overburdened by between 30% and 50%. This number is slightly below the 3.8% of the total number of households that the Asian category comprises. A total of 170 Hispanic households were considered cost overburdened by between 30% and 50%, which is 6.7% of the total cases of households that were considered cost overburdened by between 30% and 50%. This number is slightly above the 5.0% of the total number of households that the Hispanic category comprises.

A total of 870 White households were considered severely cost overburdened by greater than 50%, which is 41.9% of the total cases of households that were considered cost overburdened by greater than 50%. This number is below the 65.5% of the total number of households that the White category comprises. A total of 75 Asian households were considered severely cost overburdened by greater than 50%, which is 3.6% of the total cases of households that were considered cost overburdened by greater than 50%. This number is slightly higher than the 3.3% of the total number of households that the Asian population comprises. A total of 9 Hispanic households were considered severely cost overburdened by greater than 50%, which is 4.8% of the total number of households that were considered cost overburdened by greater than 50%. This number is slightly below the 5.0% of the total number of households that the Hispanic category comprises.

NA-30 Disproportionately Greater Need: Discussion – 91.205(b)(2)**Are there any income categories in which a racial or ethnic group has disproportionately greater need than the needs of that income category as a whole?**

The racial composition of households in the City of New Bern, according to the 2016-2020 American Community Survey, was 65.5% White; 31.9% African American/Black; 3.8% Asian; and 0.34% American Indian. The Hispanic or Latino population was 5.0%.

In the 0%-30% of Area Median Income category, African American/Black households had one or more housing problems, with a disproportionate need at 55.6%. Also, in the 30%-50% of Area Median Income category, African American/Black households had one or more housing problems, with a disproportionate need at 47.5%.

In the 0%-30% of Area Median Income category, the African American/Black ethnic group has a disproportionate need in terms of severe housing problems at 56.9% of the total households in that income category. The Asian population has disproportionate needs in both the 30%-50% and 80%-100% of Area Median Income categories at 14.2% and 36.0% of the total households in those income categories, respectively.

According to the 2016-2020 CHAS data, 26.6% of all White households, 46.3% of Black/African American households, 27.1% of Asian households, and 41.1% of Hispanic households are cost-overburdened by 30% or more. When examining housing problems, 22.9% of White households, 42.8% of Black/African American households, 22.7% of American Indian and Alaska Native households, 59.1% of Asian households, and 42.4% of Hispanic households have a housing problem. The populations most affected by cost overburdens are Black/African American households, American Indian and Alaska Native households, Asian households, and Hispanic households. The numbers are much lower for severe housing problems, with 10.7% of White households, 25.1% of Black/African American households, 48.1% of Asian households, and 20.8% of Hispanic households are experiencing severe housing problems. Overall, these numbers show that African American/Black households and Asian households in the City of New Bern are much more likely to experience a housing problem than to be cost overburdened, and that minority households in general are more likely to be cost-overburdened and have a housing problem than White households.

There is a Burmese refugee population in the City of New Bern, which is assumed to be included in the Asian household population at 0%-50% area median income. Based on the 2016-2020 CHAS data, this population is more likely to have housing problems at 7.4%, and more likely to have severe housing problems at 9.5%. Though these numbers are not large enough to account for a disproportionately greater need for this racial or ethnic group when compared to the total Asian household percentage of 3.8%, the occurrences of housing problems for this population are relatively high and should be noted.

If they have needs not identified above, what are those needs?

When comparing the housing problem numbers to the cost-overburdened numbers, it seems that cost overburdens affect all minorities, but African American/Black families are most likely to be cost overburdened or severely cost overburdened. 46.5% of African American/Black households are considered severely cost overburdened. African American/Black populations also have a disproportionate amount of housing problems and severe housing problems, such as overcrowding or incomplete kitchen or plumbing facilities. 55.6% of this population at 0%-30% area median income has at least one housing problem, and 56.9% of this population at 0%-30% area median income has at least one severe housing problem. Consultations with social service providers and housing providers support this theory, as these organizations have described the poor housing conditions in the largely Black/African American neighborhoods. It can only be assumed that these housing burdens have gotten worse, as housing prices have risen in the years since the last Five-Year Plan. Renting is more common for the residents in the majority Black/African American neighborhoods. Rents in those areas have increased significantly while incomes have not. Thus, there is a need to provide assistance for the Black/African American neighborhoods in the City of New Bern.

The Burmese refugee population has experienced housing burdens disproportionately. Asian households at 0%-50% of area median income are more likely to face housing problems such as overcrowding or incomplete kitchen or plumbing facilities, and cost overburden, with 7.4% of households experiencing at least one housing problem, and 9.5% of households experiencing at least one severe housing problem.

Hispanic or Latino households at 80%-100% of area median income are more likely to face housing problems such as overcrowding or incomplete kitchen or plumbing facilities and cost overburden, with 19.1% of households experiencing at least one housing problem, and 12.0% of households experiencing at least one severe housing problem.

Are any of those racial or ethnic groups located in specific areas or neighborhoods in your community?

The Black/African American population is concentrated in two areas east of the Downtown: around the Trent Court public housing development along the Trent River and in the Duffyfield Neighborhood north of Neuse Boulevard. Black/African American population concentration in the City is concentrated in neighborhoods with groups of 50% or more, as the entire population makes up 32.0% of the City.

Attached to this Plan are maps which illustrate the City of New Bern's demographics which are included in the Exhibits section of the Plan.

NA-35 Public Housing – 91.205(b)

Introduction

The Housing Authority of the City of New Bern’s mission is to:

- Provide equitable housing options throughout the community,
- Provide opportunities to increase the self-sufficiency of the residents, and
- Revitalize the neighborhoods by partnering with government and local agencies.

The Housing Authority of the City of New Bern is not rated as a “troubled” agency by HUD.

The Housing Authority of the City of New Bern owns and professionally manages family communities and elderly/disabled rental apartments. NBHA had one (1) public housing development: Trent Court. NBHA had a total of 218 public housing units with 110 accessible units. NBHA also owns and manages Section 8 Housing for elderly residents in New Bern Towers. There are 106 units in New Bern Towers.

The waiting lists for Trent Court and New Bern Towers are both currently open. The breakdown of the public housing waiting list (Trent Court only) by requested unit size are 11 one-bedroom units, 99 two-bedroom units, and 86 three-bedroom units, and a total of 195 individuals as of April 1, 2024 (the last waiting list available). With public housing occupancy at 96%, and the removal of units in Trent Court due to flooding from Hurricane Florence, there is a greater demand than supply.

The Housing Authority of the City of New Bern does not support any homeownership initiatives. Twin Rivers Opportunities, Inc. administers 995 Section 8 Housing Choice Vouchers as of March 20, 2024. There were 1,300 families/individuals on the Housing Choice Voucher waiting list as of March 20, 2024 (the last waiting list available). The waiting list is currently open.

Totals in Use

	Program Type								
	Certificate	Mod-Rehab	Public Housing	Vouchers Total	Project-based	Tenant-based	Special Purpose Voucher Veterans Affairs Supportive Housing	Family Unification Program	Disabled *
# of units vouchers in use	0	0	567	751	18	729	0	1	0

Table 22 - Public Housing by Program Type

*includes Non-Elderly Disabled, Mainstream One-Year, Mainstream Five-year, and Nursing Home Transition

Data Source: PIC (PIH Information Center)

Characteristics of Residents

	Program Type							
	Certificate	Mod-Rehab	Public Housing	Vouchers Total	Project-based	Tenant-based	Special Purpose Veterans Affairs Supportive Housing	Voucher Family Unification Program
# Homeless at admission	0	0	0	0	0	0	0	0
# of Elderly Program Participants (>62)	0	0	69	104	9	95	0	0
# of Disabled Families	0	0	103	178	7	170	0	0
# of Families requesting accessibility features	0	0	567	751	18	729	0	1
# of HIV/AIDS program participants	0	0	0	0	0	0	0	0
# of DV victims	0	0	0	0	0	0	0	0

Table 23 – Characteristics of Public Housing Residents by Program Type

Data Source: PIC (PIH Information Center)

Race of Residents

Race	Program Type								
	Certificate	Mod-Rehab	Public Housing	Vouchers Total	Project-based	Tenant-based	Special Purpose Veterans Affairs Supportive Housing	Voucher Family Unification Program	Disabled *
White	0	0	11	80	6	74	0	0	0
Black/African American	0	0	554	670	12	654	0	1	0
Asian	0	0	0	1	0	1	0	0	0
American Indian/Alaska Native	0	0	2	0	0	0	0	0	0

Race	Program Type								
	Certificate	Mod-Rehab	Public Housing	Vouchers Total	Project-based	Tenant-based	Special Purpose Voucher		
							Veterans Affairs Supportive Housing	Family Unification Program	Disabled *
Pacific Islander	0	0	0	0	0	0	0	0	0
Other	0	0	0	0	0	0	0	0	0

*includes Non-Elderly Disabled, Mainstream One-Year, Mainstream Five-year, and Nursing Home Transition

Table 24 – Race of Public Housing Residents by Program Type

Data Source: PIC (PIH Information Center)

Ethnicity of Residents

Ethnicity	Program Type								
	Certificate	Mod-Rehab	Public Housing	Vouchers Total	Project-based	Tenant-based	Special Purpose Voucher		
							Veterans Affairs Supportive Housing	Family Unification Program	Disabled *
Hispanic	0	0	5	5	0	5	0	0	0
Not Hispanic	0	0	562	746	18	724	0	1	0

*includes Non-Elderly Disabled, Mainstream One-Year, Mainstream Five-year, and Nursing Home Transition

Table 25 – Ethnicity of Public Housing Residents by Program Type

Data Source: PIC (PIH Information Center)

Section 504 Needs Assessment: Describe the needs of public housing tenants and applicants on the waiting list for accessible units:

NBHA asks in writing for all applicants and resident families if they require any type of accommodations, on their intake application, reexamination documents, and notices of adverse action by NBHA. A specific person and phone number is provided as the contact person for requests for accommodation for persons with disabilities.

NBHA has one (1) Section 8 community that is currently designated as Housing for Elderly Residents, which is New Bern Towers with 106 units. There are eight (8) disabled units in New Bern Towers. Currently, the Housing Authority of the City of New Bern does not plan to designate any additional public housing units in the housing authority inventory for occupancy only by elderly families or families with disabilities. There are 110 units in Trent Court that are accessible to the elderly and/or disabled.

The Housing Authority has been working to make reasonable accommodations to its public housing units to satisfy the Section 504 requirements for persons with physical disabilities such as mobility, visual, and hearing impairments. The Housing Authority is committed to providing accommodations for any resident who is in need and requests them.

According to NBHA's 2023 Five Year and Annual Plan, Hurricane Florence reduced the housing supply in a City that was already in need of additional affordable, quality housing. In response, the NBHA has decided to pursue the following strategies: demolishing outdated units and fostering the development of a comprehensive affordable housing initiative through mixed use development, vouchers, and LIHTC programs.

Most immediate needs of residents of Public Housing and Housing Choice voucher holders

The most immediate needs of Public Housing residents is for employment, training, and transportation. The immediate needs of Housing Choice voucher holders is similar, but there is a lack of safe, sound, and affordable housing units that are available for rent and within the HUD-FMR rent allowance. The severe damage that Hurricane Florence caused to the housing stock in the area limits the amount of available housing and at the same time has increased the demand.

With public housing occupancy at 96%, and much of the housing stock in the City in need of repairs, there is more demand than supply. Also, there is a shortage of availability of Section 8 Vouchers, which is evidenced by the fact that Twin Rivers Opportunities, Inc's waiting list is currently open, but the Section 8 Housing Choice provider's waiting list grew.

Twin Rivers Opportunities, Inc. runs the Family Self-Sufficiency (FSS) Program for the Housing Authority. The program gives Section 8 Voucher Holders the opportunity to establish and reach goals that they set for themselves and their families, as well as save a significant amount of money. Section 8 Voucher Holders may also use their vouchers to realize the American dream of becoming a homeowner. Both of these opportunities are available to Section 8 holders who choose to become participants in the Section 8's Family Self-Sufficiency Program. There are two parts to the program. The first part of the program is the Self-Sufficiency Program where participants have the opportunity to work towards and meet goals that they set for their families as well as save money that will become theirs when they have completed their goals. The second part of the program is the Homeownership Program. In this part of the program, a Section 8 participant can choose to use his or her Section 8 Voucher to assist with the purchase and downpayment of a home, and the monthly costs of a mortgage in place of rent.

How do these needs compare to the housing needs of the population at large

These public housing residents needs are similar to the population at large, which is based on the fact that there is a shortage of decent, safe, sanitary, and affordable housing in the City.

Discussion

The City of New Bern has identified the need for affordable housing that is decent, safe, sanitary, and accessible. The Housing Authority of the City of New Bern and Twin Rivers Opportunities, Inc. are valuable resources in addressing that need. There is a significant number of households in the City that are at or below 50% of AMI that are affected by housing problems, severe housing problems and housing cost burdens. The following are the 2024-2028 Five Year Goals and Objectives for addressing the identified housing needs identified:

DRAFT

NA-40 Homeless Needs Assessment – 91.205(c)

Introduction:

The City of New Bern is part of the NC Balance of State Continuum of Care. The Balance of State is split into thirteen (13) regional groups, each consisting of the governance structure for a CoC. The CoC is governed by a Board that was restructured to reflect the diverse groups across the CoC's 79 counties that may experience homelessness. The Board sets priorities and strategies and is organized into work groups to provide feedback on the goals and strategies of the CoC. Working groups identify regional and local homeless issues and evaluate the strategic actions planned by the CoC. The State of North Carolina sets funding priorities, receives and allocates ESG funds through a competitive application process, completes the Quarterly Performance Report (QPR) and evaluates data through HMIS. The City of New Bern is a member of Region 13, which contains Craven, Pamlico, Jones, Onslow, and Carteret Counties.

The CoC Steering Committee has approved written standards that conform to best practices for Street Outreach, Emergency Shelter, Transitional Housing, Prevention and Rapid Rehousing, Permanent Supportive Housing, and Coordinated Entry Programs. There are additional policies for follow-ups to those that have exited Rapid Re-Housing, Anti-Discrimination, and Emergency Transfers based on the Violence Against Women Act (VAWA). The Balance of State CoC provides additional guidance to rural Continuums of Care.

If data is not available for the categories "number of persons becoming and exiting homelessness each year," and "number of days that persons experience homelessness," describe these categories for each homeless population type (including chronically homeless individuals and families, families with children, veterans and their families, and unaccompanied youth):

Chronically homeless individuals and families – The Chronically Homeless are defined as an individual or family that is homeless and lives or resides in a place not meant for human habitation, a safe haven or in an emergency shelter; has been homeless and living there continually for at least one year or on at least four separate occasions in the last three years; and has an adult head of household (or a minor head of household if no adult is present in the household) with a diagnosable substance use disorder, serious mental illness, developmental disability (as defined in Section 102 of the Developmental Disabilities Assistance and Bill of Rights Act of 2000 (42 U.S.C 15002)), post-traumatic stress disorder, cognitive impairments resulting from brain injury, or chronic physical illness or disability, including the co-occurrence or two or more to those conditions. According to Point In Time count data, Craven County counted 9 chronically homeless people in 2021, 3 in 2022, and 1 in 2023. There

were no chronically homeless families with children. There appears to be a need in the area for outreach and services for the chronically homeless adult population.

Families with children – The Point In Time count for 2023 counted 3 homeless households with children in Craven County. Numbers were lower in 2022 with 1 homeless household with 4 persons. The homeless households in 2023 included 3 homeless households for a total of 8 persons.

Veterans and their families – There are large numbers of Veterans and support systems in place because of the nearby military base in Havelock. Homeless Veterans often require additional services, with mental health services being the most commonly cited need. The number of homeless Veterans in Craven County has risen from 2 in 2021, to 5 in 2022, and 11 in 2023.

Unaccompanied youth – Teens aging out of foster care, and young adults in the 18-24 age transition stage are difficult to locate. Many of them are staying with friends and family temporarily, but are technically homeless. Unaccompanied youth may also move between different shelters. There was 1 unaccompanied youth counted in the 2021 Point In Time count; 3 unaccompanied youth counted in 2022; and 1 unaccompanied youth counted in 2023 for Craven County.

DRAFT

Estimate the number and type of families in need of housing assistance for families with children and the families of veterans.

Though many of the barriers to emergency housing in the City of New Bern and Craven County have been removed, it remains a challenge to rapidly re-house families. The Point In Time count for 2021 counted no homeless households with children in Craven County. Numbers were higher in 2022 with 1 homeless household with 4 persons. The homeless households in 2023 included 3 homeless households for a total of 8 persons. Of the homeless households in 2023, 4 were unsheltered, but 26 persons were in emergency shelters.

The number of homeless Veterans in Craven County has risen from 2 in 2021, to 5 in 2022, and 11 in 2023. In addition to housing, there is a need for wrap around services for veterans. These services largely include mental health care and recovery systems for those with addictions. There are a number of instances of PTSD in the area due to the presence of the military base. Crossroads Adult Mental Health Services provides addiction counseling for Veterans, but they are limited to three (3) day emergency shelter stays. Volunteers transport Veterans with addictions to Crossroads for these services. Twin Rivers Opportunities, Inc. also administers a small number of VASH vouchers for Veterans.

Local social service agencies like NC Works work with the Continuum of Care to provide outreach to disabled veterans. If a homeless veteran is identified in Craven, Jones, or Pamlico County, the veteran is referred to the outreach program and a needs assessment is conducted by the Disabled Veteran Outreach Program.

Describe the Nature and Extent of Homelessness by Racial and Ethnic Group.

Most individuals and families experiencing homelessness, regardless of race or ethnicity, are suffering from substance abuse problems, and/or they are uneducated when it comes to financial literacy. According to homeless providers, the homeless population of Craven County closely mirrors the population of Craven County.

Describe the Nature and Extent of Unsheltered and Sheltered Homelessness.

Unsheltered Homelessness would refer to the segment of a homeless community who do not have ordinary lawful access to buildings in which to sleep, as referred to in the HUD definition as persons occupying "place not meant for human habitation", (examples: bus stop, beach, riverbed, van, RV, sidewalk). Many of the unsheltered homeless suffer from substance abuse and/or mental illness and are reluctant to abide by the rules of the shelter.

Sheltered Homelessness would refer to those in an emergency shelter, in transitional housing, or are exiting an institution where they temporarily resided lacking a fixed nighttime residence. People will be considered homeless if they are exiting an institution where they resided for up to 90 days (it was

previously 30 days). People who are losing their primary nighttime residence, which may be a motel, hotel or a doubled up situation within 14 days and lack resources or support networks to remain housing are considered sheltered homeless as well. The sheltered homeless typically do not have a steady source of income, or any source of income.

The Point In Time Count for Craven County in 2023 counted a total of 43 homeless persons and 38 homeless households. Of these, only 8 persons, or 18.6%, were unsheltered. There were no persons in transitional housing, and 35 persons that were housed in an emergency shelter. There were no chronically homeless families with children nor any unaccompanied youths that were homeless in 2023. Of the 43 homeless people counted, only 1 (2.3%) were considered chronically homeless. There were 11 homeless veterans and none of the homeless veterans were considered chronically homeless. This indicates a need for greater outreach and shelter/housing options for these special needs groups.

Discussion:

Not Applicable.

DRAFT

NA-45 Non-Homeless Special Needs Assessment - 91.205 (b,d)

Introduction:

The assessment of non-homeless special needs includes the following:

- Elderly persons (age 65 years and older)
- Frail elderly
- Persons with mental, physical and/or developmental disabilities
- Persons with alcohol or other drug additions
- Persons with HIV/AIDS and their families
- Victims of domestic violence, dating violence, sexual assault, and stalking

The housing need of each of these groups were determined by consultation with social service providers and statistical information provided by social service provider agencies.

Describe the characteristics of special needs populations in your community:

Elderly Persons are defined as persons who are age 65 years and older. According to the 2018-2022 American Community Survey, elderly persons represent 23.4% of the City's total population. Approximately 40.6% of the elderly population are age 75 years and older. In addition, roughly 19.3% of total households in the City are occupied by an elderly person living alone.

Frail Elderly are those persons who are elderly and have a form of disability, ranging from a hearing loss, vision difficulty, cognitive difficulty, ambulatory problems, and lack of self-help skills. It is estimated that approximately 33.1% of the total elderly population are frail elderly.

Persons with mental, physical and development disabilities, according to the ACS data for 2018-2022, persons with a disability comprise 15.1% (4,616 persons) of the City of New Bern's total population.

Persons with HIV/AIDS and their families comprise a small percentage of the County's overall population. In 2022, it is estimated that there were 262 individuals who have been diagnosed with HIV/AIDS living in Craven County with 10 new diagnoses in 2022. This is based on the North Carolina "2022 Annual HIV Surveillance Summary Report." Approximately 67.8% of those with HIV/AIDS living in the Region 10 of the North Carolina Regional Networks of Care and Prevention are males. Males are disproportionately affected and the HIV/AIDS population is still growing in numbers. There are no statistics available only for the City of New Bern.

Victims of Domestic Violence, dating violence, sexual assault and stalking are increasingly seeking shelter. There has been an increase in victims as a result of (but not limited to) the stress caused by flood damage. Coastal Women's Shelter has been working with victims of domestic violence and sexual assault

in the Craven County and Eastern North Carolina area to provide free and confidential services to victims of domestic and sexual violence and to the significant others of victims.

What are the housing and supportive service needs of these populations and how are these needs determined?

There is a severe need for supportive services associated with mental health care in the City of New Bern and Craven County. There are no public programs for drug and alcohol counseling or mental health care in the area. Many people with mental health issues live in assisted living facilities or find themselves incarcerated because of this lack of services. There are no follow-up services for people that seek drug addiction treatment or their families.

The North Carolina Health Department has clinics for people with communicable diseases and STIs, which can also be used by people with HIV/AIDS. The local HIV Consortium is based out of Greenville, NC in neighboring Pitt County. The Craven County Health Department tracks, monitors, and tests for HIV in the local jail populations, where the population is most likely to spread HIV. However, they have not seen an increase in HIV rates in the last year of recorded data.

Discuss the size and characteristics of the population with HIV/AIDS and their families within the Eligible Metropolitan Statistical Area:

Persons with HIV/AIDS and their families comprise a small percentage of the County's overall population. In 2022, it is estimated that there were 252 individuals who have been diagnosed with HIV/AIDS living in Craven County with 10 new diagnoses in 2022. This is based on the North Carolina "2022 Annual HIV Surveillance Summary Report." Approximately 67.8% of those with HIV/AIDS living in the Region 10 of the North Carolina Regional Networks of Care and Prevention are males. Males are disproportionately affected and the HIV/AIDS population is still growing in numbers. There are no statistics available only for the City of New Bern.

Persons living with HIV/AIDS and their families need supportive services, such as access to treatment and health care, insurance, medications, counselors or life coaches, support groups, job training and education, and transportation.

If the PJ will establish a preference for a HOME TBRA activity for persons with a specific category of disabilities (e.g., persons with HIV/AIDS or chronic mental illness), describe their

unmet need for housing and services needed to narrow the gap in benefits and services received by such persons. (See 24 CFR 92.209(c)(2) (ii))

Not Applicable.

Discussion:

The needs for these various groups of the Special Needs Population are only estimates, based on HUD data, U.S. Census Data, ACS data and interviews with housing providers and social service agencies. Accurate statistics are not available for all of these groups, so therefore “best estimates” are presented.

While many supportive service providers for the special needs population are located in the City of New Bern, their service area and clients are in Craven County, and often span the entire Eastern Carolina region. Therefore, the statistics are not limited to just the City of New Bern.

DRAFT

NA-50 Non-Housing Community Development Needs – 91.215 (f)

How were these needs determined?

These needs for public facilities were determined through:

- Resident surveys;
- Agency needs surveys;
- Interviews with City staff, City Manager, City's Department of Development Services staff, other City and County agencies, and stakeholder organizations;
- Public hearing comments on needs; and
- The City's Comprehensive Plan.

Describe the jurisdiction's need for Public Improvements:

- The sewer system is separate from the stormwater system. Stormwater drainage is a need throughout the City.
- Streets in the Greater Five Points/Duffyfield are narrow, lack sidewalks, and have poor drainage.
- Street lighting is poor in the Greater Five Points/Duffyfield Area.
- In Duffyfield, there is a severe lack of stormwater drainage. The area is in a floodplain. This affects the housing in the area, where the housing stock is already in need of repairs. Flooding makes these conditions worse.
- There is a need for resiliency improvements and redundancies in the infrastructure.
- There is a

How were these needs determined?

These needs for public facilities were determined through the resident surveys; agency needs surveys; interviews with City staff, City Manager, City's Department of Development Services staff, and other City and County agencies; public hearing comments on needs; and the City's Comprehensive Plan.

Describe the jurisdiction's need for Public Services:

- Public transit is provided by CARTS in the City and County. The service is inadequate. Routes do not reach enough destinations. Buses typically do not arrive on time, and there is a high turnover rate for drivers.
- People who require drug addiction or homeless services are not served by public transit. The fixed bus routes do not go to the locations where these services are offered.

- There is a substantial need for mental health care in the City and the surrounding areas. There are high rates of PTSD, addiction to drugs and alcohol, and other mental health issues in New Bern and Craven County.
- Wraparound services for drug addicts, veterans, homeless people, and those with mental health issues are uncommon.
- Persons with criminal histories have trouble finding housing and employment. Services to assist ex-offenders are in place, but they are not common and they are at capacity.
- The number of survivors of domestic violence increased in the area during and after the Covid-19 Pandemic lockdowns. There is a need for more shelter space for victims.
- There is a need for child care, particularly for those who are seeking jobs or job training.
- Many residents in their 20s and 30s are seeking job training. Though there are jobs in outlying areas, there is a disconnect between the employers and the applicants for those jobs.
- There is a need to educate people on digital literacy because many forms and applications for services are online. Some people who are digitally illiterate and struggle to complete forms and applications.

How were these needs determined?

These needs for public facilities were determined through

- Resident surveys;
- Agency needs surveys;
- Interviews with City staff, City Manager, City's Department of Development Services staff, other City and County agencies, and stakeholder organizations;
- Public hearing comments on needs; and
- The City's Comprehensive Plan

Housing Market Analysis

MA-05 Overview

Housing Market Analysis Overview:

The City of New Bern, NC is the county seat of Craven County and is at the core of the New Bern, NC Metropolitan Statistical Area. It is located at the confluence of the Neuse River and Trent River, approximately 30 miles (48 km) north of the Atlantic Coast. MCAS Cherry Point, a large Marine base, is located 18 miles (29 km) south of New Bern in Havelock, NC. New Bern is also home to Carolina East Health, a large regional hospital. The area as a whole has become attractive to manufacturers such as Moen and Bosch home appliances. Both the military base and the manufacturing firms have attracted workers from outside the state, along with retirees who migrate to the area from outside North Carolina. Since 2013, there has been about a 4% increase in out-of-state residents to the City of New Bern every year. The City of New Bern has experienced a steadily increasing population since the 1980's, after it decreased slightly in the 1970's. In 2000, the City of New Bern had 10,006 Households and in 2022 it had 16,265, a 62.6% increase.

13% of all the owner-occupied housing units were built before 1950, which is over 70 years ago. About one-quarter (23.4%) of the housing was built between 1950-1979, and another quarter (28.2%) was built between 1980-1999. Since the year 2000, more than a third (35.4%) of the housing stock was built.

According to 2018-2022 American Community Survey Data, the City now has 8,279 owner-occupied housing units (58.3% of all occupied housing units) and 5,903 renter-occupied housing units (41.6 % of all occupied housing units). Compared to the 2013-2017 American Community Survey Data which had nearly a 50-50 split between owner-occupied and renter-occupied housing units, the proportion of owner-occupied units has risen.

The overall condition of the housing stock is adequate, but a small percentage of the housing stock is either neglected or not adequately maintained. According to the ACS data for 2018-2022, there are 2,069 vacant housing units in the City, which is approximately 13.7% of all the housing units. This is higher than both the housing vacancy rate of Craven County of 10.9% and the statewide vacancy rate of 12.1%.

The median home value as of 2022 was \$202,500 and the median contract rent was \$1,019/month for the same time period.

MA-10 Number of Housing Units – 91.210(a)&(b)(2)

Introduction

According to the 2018-2022 ACS data, there are 16,265 total housing units. There are 14,182 occupied housing units (8,279 owner-occupied and 5,903 renter-occupied), which leaves 2,083 vacant housing units. The majority of the owner-occupied housing are 3 or more bedrooms (86% of all owner-occupied houses). Over a third (41%) of all renter-occupied households have 3 or more bedrooms.

All residential properties by number of units

Property Type	Number	%
1-unit detached structure	10,055	63%
1-unit, attached structure	795	5%
2-4 units	1,150	7%
5-19 units	1,565	10%
20 or more units	1,135	7%
Mobile Home, boat, RV, van, etc	1,185	7%
Total	15,885	100%

Table 26 – Residential Properties by Unit Number

Data Source: 2016-2020 ACS

Unit Size by Tenure

	Owners		Renters	
	Number	%	Number	%
No bedroom	10	0%	175	3%
1 bedroom	20	0%	960	16%
2 bedrooms	1,025	13%	2,355	40%
3 or more bedrooms	6,715	86%	2,405	41%
Total	7,770	99%	5,895	100%

Table 27 – Unit Size by Tenure

Data Source: 2016-2020 ACS

Describe the number and targeting (income level/type of family served) of units assisted with federal, state, and local programs.

The following number of units in the City of New Bern that are assisted with Federal, State and Local Programs is as follows:

- **Public Housing** - There are 218 public housing units in the City of New Bern.
- **Low Income Housing Tax Credit (LIHTC)** – According to HUD’s Low-Income Housing Tax Credit Database, there are a total of 1,234 Low Income Housing Tax Credit units in the City of New Bern

as of the year 2022, all of which are considered low-income units. Of these, 84 are located in Carolina Avenue Apartments, which is owned by the New Bern Housing Authority.

- **Housing Choice Vouchers** – Twin Rivers Opportunities, Inc. administers 995 vouchers that are tenant based.

Provide an assessment of units expected to be lost from the affordable housing inventory for any reason, such as expiration of Section 8 contracts.

Due to extensive damage from Hurricane Florence, the NBHA lost 108 units in the Trent Court public housing development. The Housing Authority has a plan to demolish Trent Court Apartments and replace the site with mixed-income development. The Housing Authority will provide relocation services for residents that were displaced by the demolition.

Does the availability of housing units meet the needs of the population?

There is a sufficient supply of housing units of various types within the City of New Bern. There are 8,279 owner-occupied housing units, 5,903 renter-occupied housing units, and approximately 2,083 vacant units. Of the vacant units, more than half are available, or approximately 463 are for rent and 236 are for sale. The problem is not the "availability" of units in the City of New Bern, it is the "affordability" and the "quality" of some units in the City. The need for affordable housing for singles is evidenced by the Housing Authority's public housing waiting lists.

The majority of applicants on the public housing waiting list (51%) are waiting for a two bedroom unit. After those with extremely low incomes, the applicants most likely to be on the public housing waiting list are those with a disability. There are 99 persons on the public housing waiting list that are waiting for a one bedroom apartment, 9 that identify as elderly or near-elderly, and 7 with a disability. Because the entirety of the persons on the public housing waiting list have incomes at or below 30% AMI (70% extremely low income), it stands to reason that many of the two person households waiting for a zero or one bedroom unit are extremely low income. There are 1,300 persons on the Section 8 Housing Choice Voucher waiting list.

Describe the need for specific types of housing:

The need for more affordable housing was exacerbated by the damage from Hurricane Florence and further by the nationwide rental market surge during and after the Covid-19 Pandemic. Trent Court, NBHA's family housing complex, suffered severe flood damage in 108 units, all of which have been demolished or are scheduled for demolition. The residents who were displaced by Hurricane Florence were given Tenant Protective Vouchers by Twin Rivers Opportunities, Inc. to relocate. This reduction in affordable units in the City has become a problem for all residents that are seeking affordable housing.

The City has since responded by applying for a LIHTC project on Carolina Avenue, which has 84 units of affordable housing, but more units are needed to meet the demand.

There is a need for affordable senior housing in the City of New Bern.

Discussion

According to the 2018-2022 ACS data, there are more owner-occupied housing units than renter-occupied units in the City of New Bern, with 58.4% being owner-occupied and 41.6% being renter-occupied. The goal of the City of New Bern is to encourage home ownership for those in the Greater Five Points target area, and improve rental housing conditions throughout the City. The City has been using its limited financial resources to encourage home ownership and help owner-occupied households rehabilitate their homes.

DRAFT

MA-15 Housing Market Analysis: Cost of Housing - 91.210(a)

Introduction

The cost of housing has increased from \$147,700 to \$160,500 over 11 years for a single family home. The median home value reported by the 2016-2020 American Community Survey is \$160,500. According to Zillow, the median list price for a home in the New Bern area in March 2024 was \$344,000, which is 28.2% higher than the median sale price in New Bern of \$268,269.

The cost of rent has increased by 6% during the period from 2009 to 2020, and the rental vacancy rate in 2022 is at 7.2%, which is higher than the homeowner vacancy rate of 2.7%. These numbers seem to show a higher demand for homeownership.

The City needs to continue its efforts to increase homeownership among residents of the City of New Bern and maintain affordable rental options for the elderly and disabled.

Cost of Housing

	Base Year: 2009	Most Recent Year: 2020	% Change
Median Home Value	147,700	160,500	9%
Median Contract Rent	623	660	6%

Table 28 – Cost of Housing

Data Source: 2000 Census (Base Year), 2016-2020 ACS (Most Recent Year)

Rent Paid	Number	%
Less than \$500	1,710	29.0%
\$500-999	3,490	59.2%
\$1,000-1,499	515	8.7%
\$1,500-1,999	145	2.5%
\$2,000 or more	20	0.3%
Total	5,880	99.8%

Table 29 - Rent Paid

Data Source: 2016-2020 ACS

Housing Affordability

Number of Units affordable to Households earning	Renter	Owner
30% HAMFI	775	No Data
50% HAMFI	1,735	810
80% HAMFI	4,010	2,455
100% HAMFI	No Data	3,175
Total	6,520	6,440

Table 30 – Housing Affordability

Data Source: 2016-2020 CHAS

Monthly Rent

Monthly Rent (\$)	Efficiency (no bedroom)	1 Bedroom	2 Bedroom	3 Bedroom	4 Bedroom
Fair Market Rent	829	834	1,092	1,465	1,860
High HOME Rent	829	834	1,082	1,242	1,488
Low HOME Rent	661	708	850	981	1,095

Table 31 – Monthly Rent

Data Source Comments: HUD HOME Rent Limits

Is there sufficient housing for households at all income levels?

Based on the HUD - CHAS data in the chart above, 68.2% of rental housing is affordable for low-income families and individuals with incomes at or below 80% of Area Median Income. This is based on the HUD-FMR which is lower than the average rent on the private market. However, this information from the ACS data is not consistent with the actual sales prices in the private market. According to CHAS data, there is not sufficient housing for all income levels due to the cost over burden criteria for the following groups:

The following households have housing costs that are 30% to 50% of their AMI:

- White households = 1,355 or 10.4% of total households
- Black/African American households = 910 or 7.0% of total households
- Asian households = 60 or 0.1% of total households
- Hispanic households = 170 or 1.3% of total households

The following households have housing costs that are greater than 50% of their AMI:

- White households = 870 or 6.7% of total households
- Black/African American households = 965 or 7.4% of total households
- Asian households = 75 or 0.6% of total households
- Hispanic households = 99 or 0.8% of total households

When examining the percentage of each racial or ethnic group that have a housing problem, severe housing problem, or are housing cost overburdened, compared to that racial or ethnic group overall, a different picture presents itself. According to the 2016-2020 CHAS data, 15.9% of all White households, 21.9% of Black/African American households, 22.7% of American Indian and Alaska Native households, 12.0% of Asian households, and 26.2% of Hispanic households are cost-overburdened by 30%-50%, while 10.2% of White households, 23.3% of Black households, 15.0% of Asian households, and 15.3% of Hispanic households were cost overburdened by over 50%. When examining housing problems for households at median income or less, 22.9% of White households, 42.8% of Black/African American households, 59.1% of Asian households, and 42.4% of Hispanic households have a housing problem. When comparing these

numbers to the cost-overburdened numbers, it seems as though housing problems are affecting households of all races more than cost overburdens. The numbers are often higher for severe housing problems, with 10.7% of White households, 25.1% of Black/African American households, 48.1% of Asian households, and 20.8% of Hispanic households are experiencing severe housing problems. Overall, these numbers show that many residents of the City of New Bern have a severe housing problem, African American/Black households in the City of New Bern are much more likely to experience a severe housing problem than to be cost overburdened, and that minority households in general are more likely to be cost-overburdened and have a housing problem than White households.

How is affordability of housing likely to change considering changes to home values and/or rents?

With an increasing population of out-of-state migrants moving into the area while the number of available units remains stagnant or declines due to damage from flooding, housing prices will continue to rise. Correspondingly, the amount of affordable housing will decrease as rents and sales prices increase. The median income in the City of New Bern has increased at a slower rate than the increase in the price of housing. This could cause additional housing affordability issues.

How do HOME rents / Fair Market Rent compare to Area Median Rent? How might this impact your strategy to produce or preserve affordable housing?

According to Rentometer (www.rentometer.com), it is estimated that the Area Median Rent for a one bedroom apartment is \$1,200 per month, for a two bedroom apartment is \$1,150 per month, for a three bedroom apartment \$1,800 per month, and for a four bedroom apartment \$2,200 per month. These estimates are higher than the HOME rents and Fair Market rents for one-, two-, three-, and four-bedroom apartments in Craven County. Housing affordability is the biggest housing problem for low-income families and individuals according to the CHAS data, indicating a need for housing subsidies and assistance.

Discussion

The housing market is strong in the City of New Bern, but affordability and housing quality are becoming an increasing problem for the lower income residents.

MA-20 Housing Market Analysis: Condition of Housing – 91.210(a)

Introduction

According to the 2018-2022 ACS data, the City of New Bern contains 3,308 housing units that were constructed prior to 1960, which is 20.3% of all the total housing units in the City. Less than 20% of the housing units were built within the last ten (10) years. Of all the 16,265 total housing units, 14,182 are occupied.

Definitions

The following definitions are used in the table below:

“Selected Housing Conditions:”

- Over-crowding (1.01 or more persons per room)
- Lacking a complete kitchen
- Lack of plumbing facilities and/or other utilities
- Cost overburden

“**Substandard Condition:**” Does not meet code standards, or contains one of the selected housing conditions.

“**Suitable for Rehabilitation:**” The amount of work required to bring the unit up to minimum code standards, and the existing debt on the property, together are less than the fair market value of the property.

“**Not Suitable for Rehabilitation:**” The amount of work required to bring the unit up to minimum code standard exceeds the fair market value of the property after rehabilitation work is complete.

Condition of Units

Condition of Units	Owner-Occupied		Renter-Occupied	
	Number	%	Number	%
With one selected Condition	2,265	29%	2,540	43%
With two selected Conditions	15	0%	350	6%
With three selected Conditions	10	0%	0	0%
With four selected Conditions	0	0%	0	0%
No selected Conditions	5,480	71%	3,005	51%
Total	7,770	100%	5,895	100%

Table 32 - Condition of Units

Data Source: 2016-2020 ACS

Year Unit Built

Year Unit Built	Owner-Occupied		Renter-Occupied	
	Number	%	Number	%
2000 or later	3,065	39%	1,850	31%
1980-1999	2,324	30%	2,240	38%
1950-1979	1,754	23%	1,335	23%
Before 1950	635	8%	475	8%
Total	7,778	100%	5,900	100%

Table 33 – Year Unit Built

Data Source: 2016-2020 CHAS

Risk of Lead-Based Paint Hazard

Risk of Lead-Based Paint Hazard	Owner-Occupied		Renter-Occupied	
	Number	%	Number	%
Total Number of Units Built Before 1980	2,389	31%	1,810	31%
Housing Units build before 1980 with children present	1,265	16%	440	7%

Table 34 – Risk of Lead-Based Paint

Data Source: 2016-2020 ACS (Total Units) 2016-2020 CHAS (Units with Children present)

Vacant Units

	Suitable for Rehabilitation	Not Suitable for Rehabilitation	Total
Vacant Units			
Abandoned Vacant Units			
REO Properties			
Abandoned REO Properties			

Table 35 - Vacant Units

Need for Owner and Rental Rehabilitation

Based on consultation with the City of New Bern’s Housing providers, the greatest need for rehabilitation work is in the Greater Duffyfield Area (expanded to the Greater Five Points Area to include Trent Court) and the Pembroke area. The Greater Duffyfield Area’s homes and structures were largely in need of rehabilitation before the hurricane. The area lies mainly in a floodplain and has experienced extensive damage from Hurricane Florence, which exacerbated the housing problems in the area. The Pembroke area, which is located south of State Route 17, has poor housing stock as well, but lies outside the floodplain.

The Greater Five Points Transformation Plan addresses many of the housing issues in the Greater Duffyfield Area. The plan also calls for enhancing code enforcement, marketing homeowner rehabilitation

programs in the area, increasing homeownership in the area while creating infill housing, and partnering with volunteer groups to provide other neighborhood rehabilitation programs.

One common thread identified by many of the various social service, housing, homeless, and economic development agencies is the effect of Hurricane Florence. All problems related to homelessness and housing stock were exacerbated. There is a need to elevate much of the housing stock that lies in floodplains in preparation for the next flood.

The needs for rental rehabilitation was discussed. The majority of the housing in the Greater Duffyfield Area is single family detached renter-occupied housing. Often, this housing stock has at least one housing problem. There is a concern that landlords that receive funding to rehabilitate these homes will then rent them out to tenants at a higher rate which will displace more residents.

Another need identified through consultation is for a program that improves the efficiency of housing and lowers utility bills. Many householders spend a disproportionate amount of money on their utilities due to poorly insulated housing, missing windows, and other sources of energy inefficiency.

Estimated Number of Housing Units Occupied by Low or Moderate Income Families with LBP Hazards

There are approximately 2,690 (32.4%) owner-occupied and 1,995 (33.8%) renter-occupied housing units that were built prior to 1980. Based on that, approximately 49.9% of the City's housing stock may contain LBP hazards.

Discussion

The City needs to access funds to rehabilitate homes and to construct new housing to replace the vacant and dilapidated units.

MA-25 Public and Assisted Housing – 91.210(b)

Introduction

The Housing Authority of the City of New Bern is a small housing authority that owns and professionally manages family communities and elderly/disabled rental apartments. The apartments are located throughout the City of New Bern. NBHA had one (1) public housing development: Trent Court. NBHA has a total of 218 public housing units, with 110 accessible units. NBHA also owns and manages Section 8 Housing for elderly residents in New Bern Towers and LIHTC Housing in Carolina Avenue Apartments. There are 106 units in New Bern Towers and 84 units in Carolina Avenue Apartments.

Twin Rivers Opportunities, Inc. assists families who wish to live in privately owned housing and receive rental subsidy through the Housing Choice Voucher Program instead of NBHA. Twin Rivers Opportunities administers 995 as of March 20, 2024.

Totals Number of Units

	Program Type								
	Certificate	Mod-Rehab	Public Housing	Total	Project-based	Tenant-based	Vouchers		
							Veterans Affairs Supportive Housing	Family Unification Program	Disabled *
# of units vouchers available	0	0	579	880	34	846	0	13	28
# of accessible units									

*includes Non-Elderly Disabled, Mainstream One-Year, Mainstream Five-year, and Nursing Home Transition

Table 36 – Total Number of Units by Program Type

Data Source: PIC (PIH Information Center)

Describe the supply of public housing developments:

- Trent Court (Family) – 218 units

NBHA also owns and manages Section 8 Housing for elderly residents in New Bern Towers and LIHTC Housing in Carolina Avenue Apartments. There are 106 units in New Bern Towers and 84 units in Carolina Avenue Apartments.

Describe the number and physical condition of public housing units in the jurisdiction, including those that are participating in an approved Public Housing Agency Plan:

There is a total of 218 public housing units in the City of New Bern. The properties owned by the Housing Authority are over 80 years old. The properties received a passing score on their physicals by HUD.

Public Housing Condition

Public Housing Development	Average Inspection Score
Trent Court Apartments	26

Table 37 - Public Housing Condition

Describe the restoration and revitalization needs of public housing units in the jurisdiction:

The Housing Authority of the City of New Bern has determined the needs of the properties at Trent Court and New Bern Towers. The NBHA recently submitted its Five-Year Plan Update for its FY 2023 through FY 2028 Public Housing Capital Fund Program Grant and submitted its complete Five-Year Plan for FY 2023-2028 in September 2022. The Capital Fund Grant award for FY 2023 was \$801,177. The NBHA proposed various activities to improve the overall living environment in New Bern Towers and the transformation plan for Trent Court. The needs of the Housing Authority properties, the results of the sale of the Craven Terrace property, and the plan to transition public housing away from Trent Court were discussed at New Bern Towers on September 13, 2022. Eleven guest attendees (including residents) and seven employees from the NBHA attended the meeting, and the Executive Director for NBHA reported on the 2023 Capital Fund plan and discussed the future of the Trent Court development. The application for the demolition of Trent Court will be submitted for demolition in two phases, which will not be done with FEMA funding in spite of the 108 units damaged in the storm. The 108 residents affected by the flood have been given Tenant Protective Vouchers and have found other housing, and the Housing Authority will be responsible for the relocations of the tenants in the second phase of demolitions, which will include the remaining Trent Court buildings.

The work items for the Housing Authority’s properties are as follows:

Trent Court:

- The housing will be demolished in two phases. The first phase will include the 13 flood-damaged buildings. The rest of the Trent Court units will be demolished and then rebuilt in the second phase.
- The Trent Court site will be developed with a mix of lofts, condominiums, market rate rentals, retail, and affordable housing.

The Housing Authority will expend its 2024 Capital Fund on the following projects:

- Major unit rehab
- Assessing roof conditions and replace as necessary
- Repairing or replacing bathtubs
- Repairing or replacing A/C units
- Painting units as needed
- Purchasing appliances
- Administration and staff development
- Support activities

Describe the public housing agency's strategy for improving the living environment of low- and moderate-income families residing in public housing:

According to the Five Year and Annual Plan for 2023-2028, NBHA's progress in meeting their mission and goals states that NBHA set the goal of cooperating with the City of New Bern and other neighborhood partners to promote neighborhood revitalization and economic development in designated areas of the City, as evidenced by the resident input in the development of the Gateway Renaissance Plan and Greater Five Points Transformation Plan. NBHA has an active Advisory Board (which includes residents) that expresses needs for both the New Bern Towers community and the public housing under the Housing Authority of the City of New Bern as a whole. Trent Court formerly had an active resident council, but Hurricane Florence caused the council to disband, and the residents of Trent Court have struggled to restore it.

Section 8 Voucher Holders have the opportunity to set and reach goals that they set for themselves and their families as well as save a significant amount of money. Section 8 voucher holders may also use their vouchers to realize the American dream of becoming a homeowner. Both of these opportunities are available to section 8 holders who choose to become participants in Section 8's Family Self-Sufficiency Program. There are two parts to the program. The first part of the program is the Self-Sufficiency program where participants have the opportunity to work towards and meet goals that they set for their families as well as save money that will become theirs when they have completed their goals. The second part of the program is the Homeownership Program. In this part of the program, a section 8 participant can choose to use his or her section 8 voucher to assist with the purchase and payment of a home. Each part of the Self-Sufficiency program is detailed below.

Family Self-Sufficiency (FSS) is a voluntary HUD program that encourages and assists families to become self-sufficient. Anyone currently on the Section 8 Housing Choice Voucher program is eligible for this program. FSS offers a financial incentive to families through an escrow account, which is based on an increase in a family's earned income. An example of an increase in earned income would be when a family member has a pay raise, obtains employment or has an increase in his or her working hours that results in an increase in the portion of rent that the family pays each month. For example, if a family member

begins working 40 hours per week, and the family's rent increases by \$25.00 dollars per month, that \$25.00 dollars goes into an escrow account that the Housing Authority establishes for the family. This account becomes available to the family when the family successfully completes their FSS Contract of Participation. Depending upon each participant's situation, the FSS Program can connect tenants with job training, resource planning, credit repair resources, basic skills education, high school equivalency (GED) programs, post-secondary education, and assistance with securing meaningful employment. Advisors provide emotional support, case management, and personalized assistance.

Eligible Section 8 Voucher holders may now use their vouchers to assist in the purchase of their own home through the Section 8 Homeownership Program. The voucher assistance provides a partial payment toward the mortgage every month. Participants are assisted with budgeting and credit repair as needed, provided with homeownership education, and given support every step of the way as they purchase their home.

Discussion:

The Housing Authority of the City of New Bern has been the primary provider of housing for the very low- and extremely low-income residents of the City of New Bern. Twin Rivers Opportunities, Inc. is the Section 8 Housing Voucher provider, and it is a separate entity from the Housing Authority. The Housing Authority of the City of New Bern assists individuals and families through its Public Housing Communities and Low Income Housing Tax Credit Communities. Twin Rivers Opportunities, Inc. assists families through its Section 8 Housing Choice Vouchers program.

DRAFT

MA-30 Homeless Facilities and Services – 91.210(c)

Introduction

Religious Community Services, Coastal Women's Shelter, and other City and County service groups are the providers of housing and supportive services for the City of New Bern's homeless and at risk of being homeless population.

Describe mainstream services, such as health, mental health, and employment services to the extent those services are used to complement services targeted to homeless persons

The NC Balance of State CoC acts as the lead for the SSI/SSDI Outreach, Access, and Recovery (SOAR) program to address the issues of people experiencing homelessness and assisting them in accessing Social Security Administration programs. Caseworkers meet with people experiencing homelessness to provide a direct connection to social service and disability programs and improve positive outcomes. The CoC also maintains partnerships with health care navigators, managed care organizations, free clinics, legal aid, and the Department of Social Services. CoC providers assist clients with applying for benefits such as Medicaid, Medicare, Veteran benefits, TANF, and SNAP.

The CoC staff utilizes a CoC-wide email distribution list to make announcements to its regions and share information on organizations that provide mainstream benefit. Mainstream partners are encouraged to attend regional meetings and educate both clients and providers on the benefits that their organizations can provide.

Local providers help clientele access mainstream health and mental health services along with job training and education. Religious Community Services provides much of the shelter space for individuals and families in the County while also partnering with Craven Community College for job training and Craven-Pamlico Re-Entry to assist ex-offenders with housing, transportation, and vocational skills. NCWorks provides job training and assists in housing homeless Veterans. Coastal Women's Shelter partners with local landlords to provide stable housing and keep children of families experiencing domestic violence in the same schools to assist these children in maintaining stability. Crossroads is the major mental health provider in the area, but the need for mental health care far surpasses the amount of assistance that Crossroads can provide.

List and describe services and facilities that meet the needs of homeless persons, particularly chronically homeless individuals and families, families with children, veterans and their families, and unaccompanied youth. If the services and facilities are listed on screen SP-40 Institutional Delivery Structure or screen MA-35 Special Needs Facilities and Services, describe how these facilities and services specifically address the needs of these populations.

Religious Community Services provides additional services along with beds for the homeless. They provide food and clothing for people in the local community, including those that are homeless and those with

homes but without the means to purchase these items. Religious Community Services partners with Craven Community College for job training and Craven-Pamlico Re-Entry to assist ex-offenders with housing, transportation, and vocational skills.

DRAFT

MA-35 Special Needs Facilities and Services – 91.210(d)

Introduction

The City of New Bern has identified the priorities for services and facilities for special needs population. This includes elderly, frail elderly, persons with disabilities, persons with alcohol or other drug addictions, persons with HIV/AIDS and their families, and public housing residents.

Including the elderly, frail elderly, persons with disabilities (mental, physical, developmental), persons with alcohol or other drug addictions, persons with HIV/AIDS and their families, public housing residents and any other categories the jurisdiction may specify, and describe their supportive housing needs

The following needs and objectives are established under this Five Year Consolidated Plan:

- **Elderly** - rehabilitation of existing owner-occupied housing units, and construction of new affordable and accessible apartments
- **Frail Elderly** - construction of new affordable and accessible apartments with supportive services
- **Persons with Disabilities** - rehabilitation of existing housing units for accessible improvements, reasonable accommodations to rental housing units, and supportive employment opportunities
- **Alcohol and Other Drug Addictions** - supportive services to end addictions, and training to re-enter the work force
- **Public Housing Residents** - housing down payment assistance, job training and job opportunities, housing counseling for home ownership, and assistance in finding affordable housing
- **Victims of Domestic Violence** - additional temporary shelters, supportive services and training programs, and permanent supportive housing options
- **Persons with HIV/AIDS** - permanent supportive housing and health care services

Describe programs for ensuring that persons returning from mental and physical health institutions receive appropriate supportive housing

Hospitals must have written discharge policies for "appropriate referral and transfer plans" including evaluation of a patient's capacity for self-care and possibility of being cared for in "the environment from which s/he entered the hospital." The actual discharge varies with the individual being discharged, their primary and behavioral health needs, and resources and supports available. While health care facilities try to send individuals home or to family, sometimes they discharge to a nursing home, rehab hospital or as last resort, a non-HUD funded shelter. Some shelters have protocols against accepting certain

individuals directly from a hospital. The CoC has a state and local discharge policy for those that are discharged from adult care facilities, as well as a discharge team to address the issues in discharging individuals from foster care, health care, mental health care, and correctional facilities.

Specify the activities that the jurisdiction plans to undertake during the next year to address the housing and supportive services needs identified in accordance with 91.215(e) with respect to persons who are not homeless but have other special needs. Link to one-year goals. 91.315(e)

The City of New Bern proposes as its "Vision" for the Five Year Consolidated Plan the following under "Special Needs Priority":

Priority Need: There is a continuing need for affordable housing, services, and facilities for the elderly, persons with disabilities, persons with HIV/AIDS, victims of domestic violence, persons with alcohol/drug dependency, and persons with other special needs.

Goals/Strategies:

- **SNS-1 Housing** - Promote and assist to increase the supply of affordable, decent, safe, sound, and accessible housing for the elderly, persons with disabilities, persons with HIV/AIDS, victims of domestic violence, persons with alcohol/drug dependency, and persons with other special needs through rehabilitation of existing housing and new construction of accessible housing.
- **SNS-2 Social Services** - Promote and assist in supporting social service programs and facilities for the elderly, persons with disabilities, persons with HIV/AIDS, victims of domestic violence, persons with alcohol/drug dependency, and persons with other special needs.
- **SNS-3 Accessibility** - Promote and assist in making accessibility improvements to owner occupied housing through rehabilitation and improve renter occupied housing by promoting reasonable accommodations for the physically disabled.

For entitlement/consortia grantees: Specify the activities that the jurisdiction plans to undertake during the next year to address the housing and supportive services needs identified in accordance with 91.215(e) with respect to persons who are not homeless but have other special needs. Link to one-year goals. (91.220(2))

Not Applicable.

MA-40 Barriers to Affordable Housing – 91.210(e)

Negative Effects of Public Policies on Affordable Housing and Residential Investment

The following Impediments to Fair Housing Choice along with recommendations to address any impediment are presented to assist the City of New Bern to affirmatively further fair housing in the community. There previously were no identified Impediments to Fair Housing Choice. New impediments to Fair Housing Choice are presented on the pages that follow. Several ongoing impediments are present in the City of New Bern, despite the City's best efforts, and based on economic conditions, will continue to be addressed by the City of New Bern. Below is a list of impediments that were developed as part of New Bern's 2024 Analysis of Impediments to Fair Housing Choice.

Impediments to Fair Housing Choice

- **Impediment 1: Fair Housing Education and Outreach -**

There is a continuing need to educate persons about their rights under the Fair Housing Act and to raise community awareness to affirmatively further fair housing choice.

Goal: All residents of the City of New Bern will have an awareness and knowledge of their rights under the Fair Housing Act and the City will continue to affirmatively further fair housing, especially for low-income residents, minorities, and the disabled population.

Strategies: In order to meet this goal, the following activities and strategies should continue to be undertaken:

- **1-A:** Promote fair housing awareness through the media, seminars, and training to provide educational opportunities for all persons to learn more about their rights under the Fair Housing Act, Americans With Disabilities Act, and the Visitability Tax Credit Program.
- **1-B:** Provide and distribute literature and informational material concerning fair housing issues, an individual's housing rights, and the landlords' responsibilities to affirmatively further fair housing, including laws regarding reasonable modifications and accommodations.
- **1-C:** Support and provide funding for independent fair housing organizations to provide testing services, education, outreach, referrals, and assistance in addressing fair housing complaints that may arise in the City.

- **Impediment 2: Affordable Rental Housing -**

The City of New Bern has housing that is not necessarily affordable to lower income households. The monthly housing cost for apartments has steadily increased to the point that over 36.3% of all households in New Bern are considered cost burdened.

Goal: The development of affordable rental housing will occur throughout the City of New Bern, especially for households whose income is less than 50% AMI, through new construction, in-fill housing, the rehabilitation of vacant buildings, and the development of mixed-income housing, to reduce the number of lower income households who are cost burdened.

Strategies: In order to meet this goal, the following activities and strategies should be undertaken:

- **2-A:** Support and encourage both private developers and non-profit housing providers to develop plans for the construction of new affordable and mixed income rental housing.
- **2-B:** Support and encourage the rehabilitation of the existing housing stock and new housing in the City so it becomes decent, safe, and sound rental housing that is affordable to lower income households.
- **2-C:** Support and encourage the development of independent housing and community living arrangements for the disabled in the City.
- **2-D:** Provide financial assistance in the form of development subsidies so low-income households that are cost burdened, particularly those households whose incomes are at or below 50% AMI, are able to afford decent, safe, and sound housing.
- **2-E:** Promote partnerships with the New Bern Housing Authority and private and non-profit housing developers to construct additional Low Income Housing Tax Credit (LIHTC) multi-family, rental housing in high opportunity areas of the City.
- **2-F:** Promote Section 8 Housing Choice Voucher use throughout the City.

- **Impediment 3: Affordable Housing for Sale -**

The median value and cost to purchase a single family home in New Bern that is decent, safe, and sound, has increased significantly to over \$344,000 (2024 dollars), which limits the choice of housing for lower income households throughout the City.

Goal: Development of for-sale, single family homes for lower income households will occur through new construction, in-fill housing, and the rehabilitation of vacant structures throughout the City of New Bern.

Strategies: In order to meet this goal, the following activities and strategies should be undertaken:

- **3-A:** Support and encourage plans from both private developers and non-profit housing providers to develop and construct new affordable housing that is for sale for lower income households throughout the City of New Bern.
- **3-B:** Support homebuyer education and training programs to improve homebuyer awareness and increase the opportunities for lower-income households to become homebuyers by affirmatively furthering fair housing choice.

▪ **Impediment 4: Accessible Housing Units -**

As an older, built-up urban environment, there is a lack of accessible housing units and limited developable sites in the City of New Bern, since 26.4% of the City's housing units were built before 1960 and most do not contain accessibility features, and 15.1% of the City's population is classified as disabled.

Goal: The number of accessible housing units in the City will be increased through new construction and rehabilitation of existing housing units for the physically disabled and developmentally challenged population.

Strategies: In order to meet this goal, the following activities and strategies should be undertaken:

- **4-A:** Increase the amount of accessible housing through new construction of handicap units that are accessible and visitable.
- **4-B:** Continue to enforce the ADA and Fair Housing requirements for landlords to make "reasonable accommodations" to their rental properties so they become accessible to tenants who are physically disabled.
- **4-C:** Provide financial assistance to elderly homeowners in the City to make accessibility improvements to their properties in order for these residents to remain in their own homes.

• **Impediment 5: Private Lending Practices -**

The HMDA data indicates that there may be a disparity between the approval rates of home mortgage loans originated from minorities and those originated from non-minority applicants.

Goal: Approval rates for all originated home mortgage loans will be fair, unbiased and equal, regardless of race, familial status, and location.

Strategies: In order to meet this goal, the following activities and strategies should be undertaken:

- **5-A:** The City should consider using Federal and State funding to provide housing or credit counseling to potential low- and moderate-income homebuyers in impacted neighborhoods to decrease the number of denials due to poor credit, debt to income ratios, or incomplete applications.
- **5-B:** The City should consider entering into an agreement with Legal Aid of North Carolina to perform testing to determine if any patterns of discrimination are present in home mortgage lending practices for minorities and other protected classes when they wish to purchase properties located in impacted areas of the City.
- **5-C:** The City should consider using Federal and State funding to provide a higher rate of public financial assistance to potential homebuyers in impacted neighborhoods to improve the loan to value ratio, so that private lenders will increase the number of loans made in these areas.

- **Impediment 6: Economic Issues Affect Housing Choice -**

There is a need to increase economic opportunities in the City to improve household income so lower income households have the ability to live outside areas with concentrations of low income, which makes this a fair housing concern.

Goal: The local economy will provide new job opportunities, which will increase household income, and will promote fair housing choice throughout the City of New Bern.

Strategies: In order to meet this goal, the following activities and strategies should be undertaken:

- **6-A:** Strengthen partnerships and program delivery to enhance the City's business base, expand its tax base, and create a more sustainable economy for all residents and businesses.
- **6-B:** Support and enhance workforce development and skills training that will result in a "livable" wage and increase job opportunities.

The zoning ordinance in the City of New Bern was last updated in August 2023. The zoning ordinance was reviewed as part of the Five Year Consolidated Plan process.

MA-45 Non-Housing Community Development Assets – 91.215 (f)

Introduction

The goal of the City of New Bern’s Department of Development Services is to help to plan and design the City’s form and character, support community values, preserve the environment, promote the wise use of resources and protect public health and safety through code enforcement. The Community and Economic Development Office, through the Department of Development Services, is the administration of the Community Development Block Grant. The office also provides outreach and technical assistance for variety of downtown and city-wide community and economic development projects.

Economic Development Market Analysis

Business Activity

Business by Sector	Number of Workers	Number of Jobs	Share of Workers %	Share of Jobs %	Jobs less workers %
Agriculture, Mining, Oil & Gas Extraction	63	29	1	0	0
Arts, Entertainment, Accommodations	1,685	2,775	18	19	1
Construction	399	292	4	2	-2
Education and Health Care Services	1,671	3,714	18	25	7
Finance, Insurance, and Real Estate	320	517	3	4	0
Information	98	157	1	1	0
Manufacturing	1,558	1,860	17	13	-4
Other Services	292	369	3	3	-1
Professional, Scientific, Management Services	499	715	5	5	0
Public Administration	0	0	0	0	0
Retail Trade	1,511	2,604	16	18	2
Transportation and Warehousing	248	110	3	1	-2
Wholesale Trade	251	235	3	2	-1
Total	8,595	13,377	--	--	--

Table 38 - Business Activity

Data: 2016-2020 ACS (Workers), 2020 Longitudinal Employer-Household Dynamics (Jobs)
 Source:

Labor Force

Total Population in the Civilian Labor Force	13,787
Civilian Employed Population 16 years and over	12,865
Unemployment Rate	6.74
Unemployment Rate for Ages 16-24	24.74
Unemployment Rate for Ages 25-65	3.75

Table 39 - Labor Force

Data Source: 2016-2020 ACS

Occupations by Sector	Number of People
Management, business and financial	2,509
Farming, fisheries and forestry occupations	410
Service	1,905
Sales and office	2,355
Construction, extraction, maintenance and repair	1,000
Production, transportation and material moving	1,200

Table 40 – Occupations by Sector

Data Source: 2016-2020 ACS

Travel Time

Travel Time	Number	Percentage
< 30 Minutes	10,051	80%
30-59 Minutes	1,900	15%
60 or More Minutes	641	5%
Total	12,592	100%

Table 41 - Travel Time

Data Source: 2016-2020 ACS

Education:

Educational Attainment by Employment Status (Population 16 and Older)

Educational Attainment	In Labor Force		
	Civilian Employed	Unemployed	Not in Labor Force
Less than high school graduate	1,270	230	715

Educational Attainment	In Labor Force		
	Civilian Employed	Unemployed	Not in Labor Force
High school graduate (includes equivalency)	2,235	35	1,020
Some college or Associate's degree	3,745	225	980
Bachelor's degree or higher	3,090	55	620

Table 42 - Educational Attainment by Employment Status

Data Source: 2016-2020 ACS

Educational Attainment by Age

	Age				
	18-24 yrs	25-34 yrs	35-44 yrs	45-65 yrs	65+ yrs
Less than 9th grade	0	260	455	400	365
9th to 12th grade, no diploma	260	295	120	680	510
High school graduate, GED, or alternative	830	730	765	1,795	1,420
Some college, no degree	770	1,285	740	1,300	2,075
Associate's degree	120	545	360	790	540
Bachelor's degree	270	960	513	955	970
Graduate or professional degree	0	335	505	760	935

Table 43 - Educational Attainment by Age

Data Source: 2016-2020 ACS

Educational Attainment – Median Earnings in the Past 12 Months

Educational Attainment	Median Earnings in the Past 12 Months
Less than high school graduate	21,695
High school graduate (includes equivalency)	48,940
Some college or Associate's degree	96,961
Bachelor's degree	141,553
Graduate or professional degree	150,972

Table 44 – Median Earnings in the Past 12 Months

Data Source: 2016-2020 ACS

Based on the Business Activity table above, what are the major employment sectors within your jurisdiction?

The Arts, Entertainment and Accommodations sector is the largest single sector in terms of number of employees in the City of New Bern, at 1,685 employees. Following the Arts, Entertainment and

Accommodations sector, Education and Health Care Services employs the second-most employees at 1,671. Manufacturing and Retail trade also employ more than 1,000 employees. There are 3,714 jobs in the Education and Health Care Services Sector, so there appears to be an imbalance between jobs available and employees in that sector with only 45.0% of jobs in the sector filled. Similarly, 58.0% of the 2,604 jobs in Retail Trade are filled. There are 2,775 jobs in Arts, Entertainment and Accommodations, with 60.7% of jobs in this sector.

Describe the workforce and infrastructure needs of the business community:

- The City of New Bern, in partnership with Craven County Community College opened the VOLT Center to provide workforce development and education to low- and moderate-income residents of the City of New Bern.
- Workforce development jobs require advertising so that residents take advantage of them.
- Many of the higher paying jobs in the region are seeking employees but the residents of New Bern do not have the skills to fill these positions.
- Major employers are able to attract people from other parts of the United States by offering good salaries. However, the people that emigrate to the area still require affordable housing.
- Apprenticeship programs are growing in popularity. Local organizations are partnering with high schools to provide pathways to apprenticeship and vocational tech training programs.
- Military spouses can obtain their education at Craven Community College.
- Refugee populations are diverse, and some of the refugees are highly educated but lack credentials that transfer to the United States. The business community would like to tap into this talent.
- Any work done on the military base in Havelock requires a prevailing wage for the employees. Craven County does not require these wages. This creates a wage disparity for those that work on the base and those that do not.
- North Carolina is a right to work state. Workers on the military base have unionized and created training programs, but there are no unions nor training programs outside the base.
- There is a transition academy for individuals with disabilities who have the potential to be employed in the traditional workforce.
- Transportation remains a challenge for workers. There are few good transit links to the hospital and the industrial park, which are both major employers.

Describe any major changes that may have an economic impact, such as planned local or regional public or private sector investments or initiatives that have affected or may affect job and business growth opportunities during the planning period. Describe any needs for workforce development, business support or infrastructure these changes may create.

Local investment in the Downtown New Bern Business District has attracted talent and encouraged a younger workforce to remain in New Bern. Manufacturers such as Bosch and Moen have located outside the City, but workers have trouble finding transportation to these places. Craven Area Rapid Transit System (CARTS) has a Transit Development Plan to increase ridership.

How do the skills and education of the current workforce correspond to employment opportunities in the jurisdiction?

According to the 2018-2022 ACS, the unemployment rate for persons aged 20-24, at 12.3%, is considerably higher than the overall unemployment rate at 4.5%. The local workforce does not have the skills to match the current job opportunities. Many residents that could potentially become employees of the manufacturing companies outside the City or the hospital struggle to pass a drug test. Additionally, younger people in the region have expressed the need for job training programs.

Describe any current workforce training initiatives, including those supported by Workforce Investment Boards, community colleges and other organizations. Describe how these efforts will support the jurisdiction's Consolidated Plan.

The City of New Bern is leasing land near its Development Services office to Craven Community College to act as the VOLT Center. This center is designed for those seeking job training and provides them with vocational and technical training.

Other organizations partner with Craven Community College to assist various subgroups that require job training. Religious Community Services (RCS) continues to partner with Craven Community College (CCC) to provide job training for those that stay in its shelters. RCS and CCC share space in the same building, as does Craven-Pamlico Re-Entry Council, which partners with CCC to train ex-offenders and prevent recidivism.

Does your jurisdiction participate in a Comprehensive Economic Development Strategy (CEDS)?

The City of New Bern does not participate in a Comprehensive Economic Development Strategy (CEDS).

If so, what economic development initiatives are you undertaking that may be coordinated with the Consolidated Plan? If not, describe other local/regional plans or initiatives that impact economic growth.

Not Applicable.

Discussion

There is a need for job training for residents of the City of New Bern. The City partners with Craven County Community College to address this need through the VOLT Center. The VOLT Center provides a variety of vocational and technical programs for residents of the Greater Five Points Area and the City as a whole.

DRAFT

MA-50 Needs and Market Analysis Discussion

Are there areas where households with multiple housing problems are concentrated? (include a definition of "concentration")

Areas with multiple housing problems are concentrated in the block groups that are greater than 51% Low- and Moderate-Income. The following census tracts and block groups have at least 51% of the households with low- and moderate-incomes:

- C.T. 9605, B.G. 2
- C.T. 9606, B.G. 4
- C.T. 9608, B.G. 1
- C.T. 9608, B.G. 2
- C.T. 9608, B.G. 3
- C.T. 9608, B.G. 4
- C.T. 9609, B.G. 2

Additionally, because the City of New Bern is an exception grantee and all Census Tracts where at least 50.6% of households with low- and moderate-incomes are CDHC eligible, the following Census Tract is eligible:

- C.T. 9609, B.G. 1 (50.6% low- and moderate-income)

What are the characteristics of the market in these areas/neighborhoods?

The Greater Five Points Redevelopment Area is an area of concentrated racial minorities who are also low-income. The neighborhood is composed of mostly renters and the quality of the housing stock is in need of repair. Many of the houses require rehabilitation and are inefficient, causing high utility bills for residents. Additionally, the area lies in a 100-year floodplain, and many of the housing problems that affected the neighborhood were exacerbated by Hurricane Florence.

Are there other strategic opportunities in any of these areas?

The VOLT Center is currently under construction, which is on a public transit route that connects these areas. The VOLT Center provides job training for residents of the area through a partnership between the City of New Bern and Craven Community College. It is largely accessible to City residents, but through consultation with stakeholders, students at the Volt Center have trouble with the limited transportation that only runs on weekdays and does not run into the evening.

MA-60 Broadband Needs of Housing occupied by Low- and Moderate-Income Households - 91.210(a)(4), 91.310(a)(2)

Describe the need for broadband wiring and connections for households, including low- and moderate-income households and neighborhoods.

The North Carolina Department of Information Technology has formed a Division of Broadband and Digital Equity to close the digital divide by addressing infrastructure and access, digital literacy, and affordability for residents throughout the state to access reliable, affordable internet. The state of North Carolina has been allocated \$1 billion in federal American Rescue Plan funds to be spent by the end of 2026 to build infrastructure in unserved areas to give internet speeds of 100/20 Mbps to households and support digital literacy and skills training.

The lack of broadband access is prominent in rural areas of North Carolina but for low- and moderate-income households across the state, including New Bern, the cost of internet access is a burden. Access to broadband services increases opportunities for low- and moderate-income persons by connecting them with, housing opportunities (classifieds), educational resources, and job opportunities.

The broadband issue for low- and moderate-income persons in New Bern is not availability but affordability. According to the NC Broadband Availability Index as published by the North Carolina Department of Information Technology, 97.4% of Craven County residents in 2021 could access the internet with at least a 25mb/s download speed, which is only slightly lower than the statewide access rate of 98.4% during the same period. New Bern is a long-established community, and as such, availability of services such as broadband have been in place for a number of years. Persons living on fixed incomes or working low wage jobs may not be able to afford the monthly payment for broadband access. There are locations such as libraries and public facilities which do provide access though it may not be the most convenient for users. However, in today's market the use of wireless internet through a smartphone has likely become the option of choice for most users including low- and moderate-income persons. Additionally, developers generally will include broadband wiring during construction.

Describe the need for increased competition by having more than one broadband Internet service provider serve the jurisdiction.

Having multiple service providers in an area stimulates innovation as companies compete with each other to have the optimal product for end users. The growth of these companies would also stimulate local economies as job opportunities become available to deploy and expand broadband infrastructure, and to install, improve, and/or expand broadband systems.

There does not appear to be a need for additional completion for broadband providers in New Bern. The City has approximately ten (10) providers for broadband service. These companies provide a variety of

means for access ranging from HughesNet with satellite service to Optimum and Spectrum with cable service to Brightspeed with fiber and T-Mobile with 5G. Optimum is the most available non-satellite internet provider with 77.6% availability.

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MA-65 Hazard Mitigation - 91.210(a)(5), 91.310(a)(3)**Describe the jurisdiction's increased natural hazard risks associated with climate change.**

Given the City's proximity to the Neuse and Trent Rivers and the eastern coast of North Carolina, New Bern is at risk from hurricanes and flooding. In 2018, Hurricane Florence made landfall 88 miles away from the City and caused storm surges and flooding, damaging or destroying a large portion of the city's housing units. According to interviews with community stakeholders, New Bern is still feeling the effects of Hurricane Florence and many people who were displaced by the flooding still have trouble finding stable, livable housing. In the Trent Court community run by the New Bern Housing Authority, over 100 units became flooded and uninhabitable.

With climate change leading to stronger and more numerous hurricanes hitting the eastern seaboard, it is likely that New Bern will be hit by more hurricanes in the coming years.

Describe the vulnerability to these risks of housing occupied by low- and moderate-income households based on an analysis of data, findings, and methods.

FEMA publishes a National Risk Index dataset that shows the amount of risk, expected annual loss, social vulnerability, the amount of risk from specific hazards, and community resilience for counties and census tracts. Craven County has a Risk Index of 96.4, which is considered "Relatively High." This Risk Index is higher than 96% of other U.S. counties. Among the 18 hazard types that are studied for prevalence or likelihood of risk in Craven County, hurricanes are identified as the hazard with the highest risk factor, with \$104,034,527 in expected annual losses. For perspective, the hazard type with the second highest expected annual losses is tornadoes, with expected annual losses of \$4,202,601. From these findings, New Bern, as located in Craven County, is at a high risk of being severely impacted by hurricanes.

Low- and moderate-income census tracts in the city are also at high risk according to the FEMA National Risk Index. The two census tracts in New Bern with majority low- and moderate-income residents, Census Tracts 9608 and 9609, have Risk Indices of 96.7 and 97.46, respectively. These two Census Tracts have a greater Risk Index than Craven County, though they are approximately in line with the other Census Tracts in New Bern.

Low-income households are also more likely to live in areas with greater exposure to natural hazards and less likely to live and work in structures that are resilient to these natural hazards. Immediately following disasters, FEMA aid is more oriented towards homeowners than to renters, and the increased demand for rental properties drives up the cost of rent.

Climate change will also have adverse effects on health by increasing the intensity and frequency of natural disasters that indirectly cause health problems, especially among low-income individuals who are already more likely to have chronic health conditions and greater exposure to harmful pollution.

Any occurrence of a disaster whether caused by man, nature or climate change has devastating impacts on the people affected. The impact on vulnerable lower income populations may be even more devastating. A number of these households may not have insurance or sufficient insurance to cover an unexpected event such as a fire or flood. Households renting are likely more vulnerable than homeowners as there is a great possibility a renter does not have insurance to protect themselves. Even lower income homeowners can be affected as they may not have the means to afford insurance.

DRAFT

Strategic Plan

SP-05 Overview

Strategic Plan Overview

The FY 2024-2028 Five-Year Consolidated Plan is a guide for the City of New Bern to use in its housing, community and economic development programs and initiatives. The Strategic Plan portion of the Five-Year Consolidated Plan establishes the City's goals and objectives to address its need for:

- Housing (HS);
- Homelessness (HO);
- Other Special Needs (SN);
- Community Development (CD);
- Economic Development (ED); and
- Administration, Planning, and Management (APM)

This strategy is the result of numerous meetings, surveys, and consultation with stakeholders. It is based on the needs assessment and analysis of market conditions.

The overriding objective and strategy is to assist low- and moderate-income residents (income of less than 80% of the area median income). These residents are referred to as the "target income" group. The City has an overall low- and moderate-income percentage of its population at 40.67%. The City is cognizant of the Federal regulation that at least 70% of all its CDBG funds must principally benefit low- and moderate-income persons. The City is committed to this and has designed its Strategic Plan to meet that requirement.

The principles of the FY 2024-2028 Five Year Consolidated Plan are as follows:

- **Assist** - By developing comprehensive strategies to support and assist those residents who are low and moderate income.
- **Involve** - The community and provide opportunities for citizen input in the planning process and preparation of the plan.
- **Collaborate** - Between public, private, and non-profit agencies and organizations to ensure that activities and services will be efficient and effective.
- **Leverage** - CDBG funds and other local resources to maximize the effectiveness of programs and services.
- **Promote** - Involvement of agencies and organization to undertake specific projects and activities to assist low- and moderate-income persons.

The priority needs of the Five-Year Consolidated Plan were determined based on the following:

- Review of existing reports
- Research of existing data on needs of the City
- Mapping of data
- Thorough consultation with City staff and officials
- Interviews and meetings with stakeholders
- Public hearings
- Citizen surveys
- Surveys of social service providers, housing organizations, and community and economic development agencies

The key factors affecting the determination of the Five-Year priorities for the Five Year Consolidated Plan include the following:

- The types of target income households with the greatest needs
- The areas with the greatest concentration of low-income households
- Activities that will best address the needs of City residents
- The limited amount of funding available to meet the needs
- The ability to leverage additional financial resources

Given the broad range of needs and the limited amount of resources available, the City can only meet a portion of the needs within the community. For the purpose of the Consolidated Plan, the needs identified as "high priority" are those that the City plans on addressing with available federal funds over the next five years. A designation of low priority does not mean the need does not exist in the community. A designation of low indicates that the needs will be met with resources outside of the Consolidated Plan.

This portion of the plan, the Strategic Plan, identifies the City's high priority community development and affordable housing needs that it will address over the next five years. The Strategic Plan also describes how the City will address its priority needs. This includes identifying available resources (Anticipated Resources), who will carry out the activities (Institutional Delivery Structure), and how the conditions of the market will influence the City's actions (Influence of Market Conditions). The Strategic Plan also describes the City's plans to address specific issues required by the regulations, including barriers to affordable housing, lead-paint hazards, and anti-poverty measures.

SP-10 Geographic Priorities – 91.215 (a)(1)

Geographic Area

1	Area Name:	Low- and Moderate-Income Areas
	Area Type:	Local Target area
	Other Target Area Description:	Low- and Moderate-Income Areas
	HUD Approval Date:	-
	% of Low/ Mod:	-
	Revital Type:	Comprehensive
	Other Revital Description:	-
	Identify the neighborhood boundaries for this target area.	<ul style="list-style-type: none"> • C.T. 9605, B.G. 2 • C.T. 9606, B.G. 4 • C.T. 9608, B.G. 1 • C.T. 9608, B.G. 2 • C.T. 9608, B.G. 3 • C.T. 9608, B.G. 4 • C.T. 9609, B.G. 2
	Include specific housing and commercial characteristics of this target area.	Housing in these areas is older and requires rehabilitation, both for renters and homeowners. Some of these block groups lie in the flood plain.
	How did your consultation and citizen participation process help you to identify this neighborhood as a target area?	Residents of New Bern identified these areas as areas in need of housing rehabilitation.
	Identify the needs in this target area.	There is a need for housing rehabilitation. Many of the houses are in poor condition, and some are highly inefficient and require extensive upgrades of the core systems. There is also a need for stormwater improvements. Many of these houses lie in the floodplain, and stormwater drainage would assist in mitigating flood effects.
	What are the opportunities for improvement in this target area?	The housing stock requires rehabilitation, and often proves to be economically viable to rehabilitate regardless of age. Most of the housing damaged by Hurricane Florence-related flooding has already been removed or repaired, but demolition is still an option where rehabilitation is cost-prohibitive.

<p>Are there barriers to improvement in this target area?</p>	<p>Funding is limited for improvements in these areas and the City must decide where to prioritize the use of its funding.</p>
<p>2 Area Name:</p>	<p>Greater Five Points</p>
<p>Area Type:</p>	<p>Local Target area</p>
<p>Other Target Area Description:</p>	<p>-</p>
<p>HUD Approval Date:</p>	<p>-</p>
<p>% of Low/ Mod:</p>	<p>-</p>
<p>Revital Type:</p>	<p>Comprehensive</p>
<p>Other Revital Description:</p>	<p>-</p>
<p>Identify the neighborhood boundaries for this target area.</p>	<ul style="list-style-type: none"> • C.T. 9605, B.G. 2 • C.T. 9606, B.G. 4 • C.T. 9608, B.G. 1 • C.T. 9608, B.G. 2 • C.T. 9608, B.G. 3 • C.T. 9608, B.G. 4 • C.T. 9609, B.G. 2
<p>Include specific housing and commercial characteristics of this target area.</p>	<p>The housing in the area is old and the majority of the residents of the area are renters. The housing is of poor quality and requires rehabilitation. The neighborhood lies in a floodplain and much of the housing took extensive damage from Hurricane Florence. Many houses in the area are also inefficient, causing high utility bills for residents. There is little commercial activity in the area despite proximity to Downtown New Bern and a street that is zoned for commercial in the neighborhood.</p>
<p>How did your consultation and citizen participation process help you to identify this neighborhood as a target area?</p>	<p>The Redevelopment Commission of the City of New Bern discussed the redevelopment plan for the Greater Five Points area.</p>

<p>Identify the needs in this target area.</p>	<p>There are needs for housing, infrastructure, recreation, and public service improvements. The area features many vacant lots and infill housing is required. The area is in a floodplain and the stormwater drainage is poor. Streets in the neighborhood are narrow and lack sidewalks. The Stanley White Recreation Center was closed due to the flood, and there is no longer programming in the neighborhood.</p>
<p>What are the opportunities for improvement in this target area?</p>	<p>The community in the neighborhood is engaged and strives to improve the conditions in the area.</p>
<p>Are there barriers to improvement in this target area?</p>	<p>The Greater Five Points neighborhood has the highest concentration of residents that are low- and moderate-income in the City.</p>

Table 45 - Geographic Priority Areas

General Allocation Priorities

Describe the basis for allocating investments geographically within the jurisdiction (or within the EMSA for HOPWA)

The City of New Bern will focus its investment of CDBG funds in neighborhoods where more than 51% of the residents are low or moderate income (earning less than 80% of the area median income) as well as a specific targeted Neighborhood Revitalization Strategy Area. A map of low- and moderate-income areas by Census Block Group is included as an attachment to this plan.

Overall, the City estimates approximately 100% of the City's CDBG funds will be used in low- and moderate-income neighborhoods throughout the City or by organizations that principally serve and low- and moderate-income clientele. In certain cases, the City may use CDBG for the acquisition and/or demolition of structures outside of low- and moderate-income neighborhoods in order to prevent or eliminate blighting influences. In addition, economic development projects will either be located in a low and moderate-income census tract/block group with a poverty rate greater than 20%, part of a redevelopment plan, or will make 51% of the jobs available to low and moderate-income persons.

SP-25 Priority Needs - 91.215(a)(2)

Priority Needs

1. Priority Need Name	Housing Strategy
Priority Level	High
Population	Extremely Low Low Moderate Middle Large Families Families with Children Elderly Public Housing Residents Rural Chronic Homelessness Individuals Families with Children Mentally Ill Chronic Substance Abuse veterans Persons with HIV/AIDS Victims of Domestic Violence Unaccompanied Youth Elderly Frail Elderly Persons with Mental Disabilities Persons with Physical Disabilities Persons with Developmental Disabilities Persons with Alcohol or Other Addictions Persons with HIV/AIDS and their Families Victims of Domestic Violence Non-housing Community Development
Geographic Areas Affected	Greater Five Points Area Citywide
Associated Goals	HS-1 Homeownership HS-2 Housing Construction HS-3 Housing Rehabilitation HS-4 Rent and Utility Assistance

<p>Description</p>	<p>There is a need to improve the quality of the housing stock in the City by increasing the amount of decent, safe, sound and accessible housing for homeowners, renters, and homebuyers, that is affordable to low- and moderate-income persons and households living in the City of New Bern.</p>
<p>Basis for Relative Priority</p>	<p>Approximately 36.4% of housing within the City jurisdiction was built before 1980 (forty years old or older). This is lower than the nationwide rate (about 50.3% was built before 1980 nationwide) which may be due to older housing being damaged and demolished after Hurricane Florence. The remaining older housing is disproportionately owned by low- and moderate-income homeowners who may find it difficult to maintain the condition of older units. According to the most recent CHAS data, 29.5% of all City homeowners have a HUD-defined housing problem, but 65% of low- and moderate-income homeowners have a housing problem. The City has built internal capacity on owner-occupied housing rehabilitation programs. Based on the available data and knowledge of the housing market, the City plans to fund housing rehabilitation programs over the next five (5) years.</p> <p>Of the four HUD-defined housing problems, cost burden is the most common problem. 45.0% of renters had a cost burden, meaning that more than 30% of household income went toward housing costs, and 24.2% were severely cost-burdened (more than 50% of income going to housing costs). Only 11.8% of renter-occupied households had a different housing problem (overcrowded, lacking complete plumbing or kitchens, or housing cost not computed). For cost-overburdened renters in particular, there is a high risk of homelessness whenever there is a disruption in income such as loss of employment or reduction of hours, or if a major cost comes due such as a medical expense or car repair. In particular, car repairs often take precedence over rent and utility payments due to needing mobility for employment and not having viable public transit options.</p>
<p>2. Priority Need Name</p>	<p>Homeless Strategy</p>
<p>Priority Level</p>	<p>High</p>

Population	Extremely Low Low Large Families Families with Children Elderly Rural Chronic Homelessness Individuals Families with Children Mentally Ill Chronic Substance Abuse veterans Persons with HIV/AIDS Victims of Domestic Violence Unaccompanied Youth
Geographic Areas Affected	Citywide
Associated Goals	HO-1 Housing HO-2 Operations/Support HO-3 Prevention and Rapid Re-Housing
Description	There is a need for housing and support services for homeless persons and persons at-risk of becoming homeless.
Basis for Relative Priority	Need was identified through consultation with the CoC.
3. Priority Need Name	Other Special Needs Strategy
Priority Level	Low

Population	Extremely Low Low Moderate Middle Large Families Families with Children Elderly Public Housing Residents Mentally Ill Chronic Substance Abuse veterans Persons with HIV/AIDS Victims of Domestic Violence Elderly Frail Elderly Persons with Mental Disabilities Persons with Physical Disabilities Persons with Developmental Disabilities Persons with Alcohol or Other Addictions Persons with HIV/AIDS and their Families Victims of Domestic Violence Non-housing Community Development
Geographic Areas Affected	Citywide
Associated Goals	SN-1 Housing SN-2 Social Services SN-3 Accessibility
Description	There is a continuing need for affordable housing, services, and facilities for the elderly, persons with disabilities, persons with HIV/AIDS, victims of domestic violence, persons with drug/alcohol dependency, and persons with other special needs.
Basis for Relative Priority	There is an increasing number of special needs population that cannot afford to live in the City.
4. Priority Need Name	Community Development Strategy
Priority Level	High

<p>Population</p>	<p>Extremely Low Low Moderate Middle Large Families Families with Children Elderly Public Housing Residents Rural Chronic Homelessness Individuals Families with Children Mentally Ill Chronic Substance Abuse veterans Persons with HIV/AIDS Victims of Domestic Violence Unaccompanied Youth Elderly Frail Elderly Persons with Mental Disabilities Persons with Physical Disabilities Persons with Developmental Disabilities Persons with Alcohol or Other Addictions Persons with HIV/AIDS and their Families Victims of Domestic Violence Non-housing Community Development</p>
<p>Geographic Areas Affected</p>	<p>Greater Five Points Area Citywide</p>
<p>Associated Goals</p>	<p>CD-1 Infrastructure CD-2 Community Facilities CD-3 Public Services CD-4 Food Programs CD-5 Public Transit CD-6 Demolition and Clearance CD-7 Architectural Barriers CD-8 Public Safety</p>

<p>Description</p>	<p>There is a need to improve the public and community facilities, infrastructure, public social/welfare services, food programs, public safety, clearance, and the quality of life for all residents of the City of New Bern.</p>
<p>Basis for Relative Priority</p>	<p>The City's facilities/infrastructure are old and in need of repair/replacement. The City feels the use of funds for supportive services, especially those geared toward seniors and youth, is an effective use of funds that can substantially improve the living situations for these residents. This priority need was based in part on consultations with local non-profit service providers.</p>
<p>5. Priority Need Name</p>	<p>Economic Development Strategy</p>
<p>Priority Level</p>	<p>Low</p>
<p>Population</p>	<p>Extremely Low Low Moderate Middle Large Families Families with Children Elderly Public Housing Residents Rural Chronic Homelessness Individuals Families with Children Mentally Ill Chronic Substance Abuse veterans Persons with HIV/AIDS Victims of Domestic Violence Unaccompanied Youth Elderly Frail Elderly Persons with Mental Disabilities Persons with Physical Disabilities Persons with Developmental Disabilities Persons with Alcohol or Other Addictions Persons with HIV/AIDS and their Families Victims of Domestic Violence Non-housing Community Development</p>

Geographic Areas Affected	Citywide
Associated Goals	ED-1 Employment ED-2 Financial Assistance ED-3 Redevelopment Program
Description	There is a need to increase and promote job creation, self-sufficiency, education, job training, technical assistance, and economic empowerment for low- and moderate-income residents of the City of New Bern.
Basis for Relative Priority	The City has a relatively high unemployment rate and a low percentage of persons in the labor force with a college degree.
6. Priority Need Name	Administration, Planning, and Management Strategy
Priority Level	High

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<p>Population</p>	<p>Extremely Low Low Moderate Middle Large Families Families with Children Elderly Public Housing Residents Rural Chronic Homelessness Individuals Families with Children Mentally Ill Chronic Substance Abuse Veterans Persons with HIV/AIDS Victims of Domestic Violence Unaccompanied Youth Elderly Frail Elderly Persons with Mental Disabilities Persons with Physical Disabilities Persons with Developmental Disabilities Persons with Alcohol or Other Addictions Persons with HIV/AIDS and their Families Victims of Domestic Violence Non-housing Community Development Other</p>
<p>Geographic Areas Affected</p>	<p>Greater Five Points Area Citywide</p>
<p>Associated Goals</p>	<p>AM-1 Overall Coordination AM-2 Fair Housing</p>
<p>Description</p>	<p>There is a continuing need to provide sound and professional planning, administration, oversight and management of Federal, state, and local funded programs.</p>
<p>Basis for Relative Priority</p>	<p>Funds are needed to administer the programs and abide by Federal Regulation.</p>

Table 46 – Priority Needs Summary

Narrative (Optional)

The results of the needs assessment, citizen outreach, and consultation process indicate the most pressing need is now the lack of affordable housing of any type, especially affordable housing that can be classed as decent, safe, and sanitary. Meeting this goal will include improvement of the large number of housing properties in substandard condition as well as constructing new affordable units and rehabilitating existing housing stock. Other priority needs include homelessness, economic and community development, and increased access to public services.

For each need described above, the City indicated a relative high priority or low priority. A high priority need is one that the City will focus its available time, effort, and resources to address. A low priority indicates that the resources available through this plan will most likely be used to address the need. It should be noted that a low priority need does not mean the need does not exist or the City will not take action to address that need. For example, public housing was designated as a low priority. However, the City will coordinate closely with the Housing Authority to ensure they are able to meet their goals, but since the NBHA receives adequate funding to meet its needs, the City will use its limited resources elsewhere. It should be noted that as funding availability changes over the term of the Consolidated Plan, the City may need to use Consolidated Plan funds to leverage a project that meets a low priority need that also serves overarching community development or affordable housing priorities described in this plan.

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SP-30 Influence of Market Conditions – 91.215 (b)

Influence of Market Conditions

Affordable Housing Type	Market Characteristics that will influence the use of funds available for housing type
Tenant Based Rental Assistance (TBRA)	The City of New Bern does not provide Tenant Based Rental Assistance.
TBRA for Non-Homeless Special Needs	The City of New Bern does not provide Tenant Based Rental Assistance.
New Unit Production	There is a high need for infill housing in the City. The City needs affordable, accessible, decent, safe, and sanitary housing.
Rehabilitation	There is a high demand in the City of New Bern to provide rehabilitation assistance. The City needs affordable, accessible, decent, safe, and sanitary housing that could be accomplished through rehabilitation.
Acquisition, including preservation	Though the remaining damage from Hurricane Florence has created the need for demolitions of structures damaged by the flooding, there is no need for the City to acquire the properties beyond demolition.

Table 47 – Influence of Market Conditions

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SP-35 Anticipated Resources - 91.215(a)(4), 91.220(c)(1,2)

Introduction

The City of New Bern is receiving \$291,714 from CDBG funds. The program year goes from July 1, 2024 through June 30, 2025. These funds will be used to address the following priority needs:

- Community Development
- Administration, Planning, and Management

The expected amount of Federal funds available for the remainder of the Five Year Consolidated Plan is based on the FY 2024 Federal Allocation times five (5) years, this amount does not include program income.

- **FY 2024** - CDBG = \$291,714.00
- **FY 2025** - CDBG = \$291,714.00
- **FY 2026** - CDBG = \$291,714.00
- **FY 2027** - CDBG = \$291,714.00
- **FY 2028** - CDBG = \$291,714.00
- **Totals - CDBG = \$1,458,570.00**

The yearly accomplishments of these projects/activities are reported in the FY 2024 Consolidated Annual Performance and Evaluation Report (CAPER) and then annually thereafter for the entire FY 2024-2028 Five Year Consolidated Plan period.

Anticipated Resources

Program	Source of Funds	Uses of Funds	Expected Amount Available Year 1				Expected Amount Available Remainder of Con Plan \$	Narrative Description
			Annual Allocation: \$	Program Income: \$	Prior Year Resources: \$	Total: \$		
CDBG	Public-Federal	Acquisition	\$291,714	\$0.00	\$0.00	\$291,714	\$1,166,856	3 projects/activities were funded based on FY 2024 CDBG allocations.
		Admin and Planning						
		Economic Development						
		Housing						
		Public Improvements						
		Public Services						

Table 48 - Anticipated Resources

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Explain how federal funds will leverage those additional resources (private, state and local funds), including a description of how matching requirements will be satisfied

In addition to the entitlement funds, the City of New Bern anticipates the following Federal resources may be available to local non-profit organizations to undertake the housing strategies identified in the Five Year Consolidated Plan.

- Supportive Housing Program
- Low-Income Housing Tax Credit Program (LIHTC)
- Section 8 Rental Assistance Program
- Public Housing Capital Fund Program
- Rental Assistance Demonstration (RAD)
- Economic Development Initiative (EDI) Community Project Funding (CPF) Congressionally Directed Funding

Private and non-Federal resources that may be available to the City of New Bern in FY 2024 to address needs identified in the FY 2024-2028 Five Year Consolidated Plan are listed below.

- **EDA Workforce Development Grant** – The United States Economic Development Administration fields a competitive application for workforce development funding.
- **Golden LEAF Funding** – This North Carolina grant supports workforce development in rural areas of the state of North Carolina that were once dependent on agriculture and tobacco farming.
- **Tobacco Trust Fund Grant** – The North Carolina Tobacco Trust Fund (NCTTFC) was created to assist current and former tobacco farmers, former quota holders, persons engaged in tobacco-related business, and individuals displaced from tobacco-related employment that were affected by the major tobacco settlement in 1998. These funds are used for projects that support employment for these groups.
- **Federal Home Loan Bank Affordable Housing Program (AHP)** – Congress has mandated that ten (10%) of the Federal Home Loan Bank's profits be allocated to provide affordable housing. The FHLB encourages its members to work with public agencies and non-profit housing development organizations in creating highly leveraged affordable housing initiatives. Both sales and rental housing are eligible.

If appropriate, describe publicly owned land or property located within the jurisdiction that may be used to address the needs identified in the plan

The City intends to build affordable housing on these lots. The lots are scattered throughout the Area. Some are buildable and meet the zoning requirements, others are not and will be transferred by sale or donation to adjacent property owners.

Discussion

Not Applicable.

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SP-40 Institutional Delivery Structure – 91.215(k)

Explain the institutional structure through which the jurisdiction will carry out its consolidated plan including private industry, non-profit organizations, and public institutions

Responsible Entity	Responsible Entity Type	Role	Geographic Area Served
City of New Bern	Government	Planning	Jurisdiction
Housing Authority of the City of New Bern	PHA	LIHTC Public Housing Rental	Jurisdiction
Twin Rivers Opportunities, Inc.	PHA	Rental	Jurisdiction
North Carolina Balance of State CoC	Continuum of Care	Homelessness Non-homeless special needs Planning public services Rental	Region

Table 49 - Institutional Delivery Structure

Assessment of Strengths and Gaps in the Institutional Delivery System

Persons with HIV/AIDS and their families comprise a small percentage of the County’s overall population. According to the 2022 North Carolina HIV Surveillance Data Tables, it is estimated that there were 262 individuals who have been diagnosed with HIV/AIDS living in Craven County with 10 new HIV diagnoses. The “North Carolina HIV/AIDS Surveillance Report Vol. 2023, No. 4” lists an additional 9 new HIV diagnoses between January and December 2023. Approximately 67.8% of those with HIV/AIDS living in the eleven-county Region 10 of the North Carolina Regional Networks of Care and Prevention are men, 31.0% are women and 1.2% are transgender or gender non-conforming. Males are disproportionately affected and while retroviral treatment is relatively readily available, the population with HIV or AIDS is still growing in numbers. There are no statistics available solely for the City of New Bern.

The North Carolina Health Department has clinics for people with communicable diseases and STIs, which can be used by people with HIV/AIDS. The local HIV Consortium is based out of Greenville, NC in neighboring Pitt County. The Craven County Health Department tracks, monitors, and tests for HIV in the local jail populations, which are the populations that most typically spread HIV. As of the most recent report in 2019, they have not seen an increase in HIV in this population.

Availability of services targeted to homeless persons and persons with HIV and mainstream services

Homelessness Prevention Services	Available in the Community	Targeted to Homeless	Targeted to People with HIV
Homelessness Prevention Services			
Counseling/Advocacy	X		
Legal Assistance	X		
Mortgage Assistance	X		
Rental Assistance	X		
Utilities Assistance	X		
Street Outreach Services			
Law Enforcement			
Mobile Clinics			
Other Street Outreach Services	X	X	
Supportive Services			
Alcohol & Drug Abuse	X	X	
Child Care	X		
Education	X		
Employment and Employment Training	X	X	
Healthcare	X		
HIV/AIDS	X		
Life Skills	X	X	
Mental Health Counseling	X		
Transportation			
Other			

Table 50 - Homeless Prevention Services Summary

Describe how the service delivery system including, but not limited to, the services listed above meet the needs of homeless persons (particularly chronically homeless individuals and families, families with children, veterans and their families, and unaccompanied youth)

Throughout the service area of the Continuum of Care there are groups, governmental entities, and organizations that provide assistance and services to all of these populations. While many of the services may not be reserved and limited to homeless persons and persons with HIV, they are widely advertised and made available to the general public.

The following services are targeted to the homeless:

- Religious Community Services provides shelter, food, and clothing to homeless individuals and families in Craven County.
- Coastal Women’s Shelter provides housing for persons who have been victims of domestic violence. They provide shelter for families as well.

- Children’s Developmental Services Agency serves the youngest children in the region. They will travel between various shelters to assist families and develop competencies for parents.
- MERCI Clinic offers a free clinic for people without insurance aged 18-64. They do not have a large staff and many of their patients are given referrals to other services.
- The North Carolina Health Department provides clinics for people with communicable diseases and STIs.

Describe the strengths and gaps of the service delivery system for special needs population and persons experiencing homelessness, including, but not limited to, the services listed above

There is a growing special needs population in the City of New Bern, especially for persons with mental health issues and persons with addictions and substance abuse issues. The City also has an increasing retiree population that is in need of supportive housing and services. The growing opioid crisis has put a strain on healthcare facilities and local public services. Other North Carolina cities are able to use allocations of Emergency Solutions Grants (ESG) to fund rapid re-housing programs and homeless prevention programs that somewhat help alleviate the need for emergency shelters, but New Bern does not receive an ESG allocation.

Provide a summary of the strategy for overcoming gaps in the institutional structure and service delivery system for carrying out a strategy to address priority needs

The City of New Bern has partnered with various County agencies, nonprofits, and service providers to carry out the services required by special needs populations. However, there are significant needs for mental health services and addiction counseling services in the region. The City will continue to partner with nonprofits that manage partnerships with these organizations and assist persons with special needs.

SP-45 Goals Summary – 91.215(a)(4)

Goals Summary Information

Sort Order	Goal Name	Start Year	End Year	Category	Geographic Area	Needs Addressed	Funding	Goal Outcome Indicator
1.	HS-1 Homeownership	2024	2028	Affordable Housing	Greater Five Points Low- and Moderate-Income Areas	Housing	CDBG: \$0	Direct Financial Assistance to Homebuyers: 0 Households Assisted
2.	HS-2 Housing Construction	2024	2028	Affordable Housing	Greater Five Points Low- and Moderate-Income Areas	Housing	CDBG: \$0	Rental units constructed: 0 Household Housing Unit Homeowner Housing Added: 0 Household Housing Unit
3.	HS-3 Housing Rehabilitation	2024	2028	Affordable Housing	Greater Five Points Low- and Moderate-Income Areas	Housing	CDBG: \$75,000	Homeowner Housing Rehabilitated: 4 Household Housing Unit

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Sort Order	Goal Name	Start Year	End Year	Category	Geographic Area	Needs Addressed	Funding	Goal Outcome Indicator
4.	HS-4 Rent and Utility Assistance	2024	2028	Affordable Housing	Greater Five Points Low- and Moderate-Income Areas	Housing	CDBG: \$10,000	Public service activities for Low/Moderate Income Housing Benefit: 20 Households Assisted Tenant-based rental assistance / Rapid Rehousing: 0 Households Assisted Other: 0 Other
5.	HO-1 Housing	2024	2028	Homeless	Low- and Moderate-Income Areas	Homeless	CDBG: \$0	Public Facility or Infrastructure Activities for Low/Moderate Income Housing Benefit: 0 Households Assisted Overnight/Emergency Shelter/Transitional Housing Beds added: 0 Beds Other: 0 Other

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Sort Order	Goal Name	Start Year	End Year	Category	Geographic Area	Needs Addressed	Funding	Goal Outcome Indicator
6.	HO-2 Operations and Support	2024	2028	Homeless	Low- and Moderate-Income Areas	Homeless	CDBG: \$0	Tenant-based rental assistance / Rapid Rehousing: 0 Households Assisted Homeless Person Overnight Shelter: 0 Persons Assisted Overnight/Emergency Shelter/Transitional Housing Beds added: 0 Beds Homelessness Prevention: 0 Persons Assisted Other: 0 Other
7.	HO-3 Prevention and Rapid Re-Housing	2024	2028	Homeless	Low- and Moderate-Income Areas	Homeless	CDBG: \$0	Tenant-based rental assistance / Rapid Rehousing: 0 Households Assisted Homelessness Prevention: 0 Persons Assisted Other: 0 Other

Sort Order	Goal Name	Start Year	End Year	Category	Geographic Area	Needs Addressed	Funding	Goal Outcome Indicator
8.	SN-1 Housing	2024	2028	Non-Homeless Special Needs	Greater Five Points Low- and Moderate-Income Areas	Special Needs	CDBG: \$0	Tenant-based rental assistance / Rapid Rehousing: 0 Households Assisted Other: 0 Other
9.	SN-2 Social Services	2024	2028	Non-Homeless Special Needs	Low- and Moderate-Income Areas	Special Needs	CDBG: \$0	Public service activities other than Low/Moderate Income Housing Benefit: 0 Persons Assisted Public service activities for Low/Moderate Income Housing Benefit: 0 Households Assisted Other: 0 Other

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Sort Order	Goal Name	Start Year	End Year	Category	Geographic Area	Needs Addressed	Funding	Goal Outcome Indicator
10.	SN-3 Accessibility	2024	2028	Non-Homeless Special Needs	Low- and Moderate- Income Areas	Special Needs	CDBG: \$0	Public Facility or Infrastructure Activities other than Low/Moderate Income Housing Benefit: 0 Persons Assisted Rental units rehabilitated: 0 Household Housing Unit Homeowner Housing Rehabilitated: 0 Household Housing Unit Other: 0 Other
11.	CD-1 Infrastructure	2024	2028	Non-Housing Community Development	Greater Five Points Low- and Moderate- Income Areas	Community Development	CDBG: \$292,987	Public Facility or Infrastructure Activities other than Low/Moderate Income Housing Benefit: 500 Persons Assisted Other: 2 Other

Sort Order	Goal Name	Start Year	End Year	Category	Geographic Area	Needs Addressed	Funding	Goal Outcome Indicator
12.	CD-2 Community Facilities	2024	2028	Non-Housing Community Development	Greater Five Points Low- and Moderate-Income Areas	Community Development	CDBG: \$298,845	Public Facility or Infrastructure Activities other than Low/Moderate Income Housing Benefit: 500 Persons Assisted Other: 3 Other
13.	CD-3 Public Services	2024	2028	Non-Housing Community Development	Greater Five Points Low- and Moderate-Income Areas	Community Development	CDBG: \$155,028	Public service activities other than Low/Moderate Income Housing Benefit: 80 Persons Assisted Public service activities for Low/Moderate Income Housing Benefit: 0 Households Assisted Other: 0 Other

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Sort Order	Goal Name	Start Year	End Year	Category	Geographic Area	Needs Addressed	Funding	Goal Outcome Indicator
14.	CD-4 Food Programs	2024	2028	Non-Housing Community Development	Greater Five Points Low- and Moderate-Income Areas	Community Development	CDBG: \$5,000	Public service activities other than Low/Moderate Income Housing Benefit: 250 Persons Assisted Other: 0 Other
15.	CD-5 Public Transit	2024	2028	Non-Housing Community Development	Greater Five Points Low- and Moderate-Income Areas	Community Development	CDBG: \$0	Public service activities other than Low/Moderate Income Housing Benefit: 0 Persons Assisted Other: 0 Other
16.	CD-6 Demolition and Clearance	2024	2028	Non-Housing Community Development	Greater Five Points Low- and Moderate-Income Areas	Community Development	CDBG: \$325,000	Buildings Demolished: 25 Buildings
17.	CD-7 Architectural Barriers	2024	2028	Non-Housing Community Development	Greater Five Points Low- and Moderate-Income Areas	Community Development	CDBG: \$0	Public Facility or Infrastructure Activities other than Low/Moderate Income Housing Benefit: 0 Persons Assisted Other: 0 Other

Sort Order	Goal Name	Start Year	End Year	Category	Geographic Area	Needs Addressed	Funding	Goal Outcome Indicator
18.	CD-8 Public Safety	2024	2028	Non-Housing Community Development	Greater Five Points Low- and Moderate-Income Areas	Community Development	CDBG: \$0	Public service activities other than Low/Moderate Income Housing Benefit: 0 Persons Assisted Other: 0 Other
19.	ED-1 Employment	2024	2028	Non-Housing Community Development	Low- and Moderate-Income Areas	Economic Development	CDBG: \$5,000	Jobs created/retained: 2 Jobs Businesses assisted: 0 Businesses Assisted Other: 0 Other
20.	ED-2 Financial Assistance	2024	2028	Non-Housing Community Development	Low- and Moderate-Income Areas	Economic Development	CDBG: \$0	Jobs created/retained: 0 Jobs Businesses assisted: 0 Businesses Assisted Other: 0 Other

Sort Order	Goal Name	Start Year	End Year	Category	Geographic Area	Needs Addressed	Funding	Goal Outcome Indicator
21.	ED-3 Redevelopment Program	2024	2028	Non-Housing Community Development	Greater Five Points Low- and Moderate-Income Areas	Economic Development	CDBG: \$0	Facade treatment/business building rehabilitation: 0 Business Brownfield acres remediated: 0 Acre Jobs created/retained: 0 Jobs Businesses assisted: 0 Businesses Assisted Other: 0 Other
22.	APM-1 Overall Coordination	2024	2028	Administration	Greater Five Points Low- and Moderate-Income Areas	Administration, Planning, and Management	CDBG: \$291,710	Other: 5 Others
23.	APM-2 Fair Housing	2024	2028	Administration	Greater Five Points Low- and Moderate-Income Areas	Administration, Planning, and Management	CDBG: \$0	Other: 5 Others

Table 51 – Goals Summary

Goal Descriptions

1.	Goal Name	HS-1 Homeownership
	Goal Description	Promote and assist low- and moderate-income households who wish to become homeowners by providing down payment assistance, closing cost assistance, and requiring housing counseling training.
2.	Goal Name	HS-2 Housing Construction
	Goal Description	Promote and assist in financing the development of affordable housing for both rental and for-sale housing.
3.	Goal Name	HS-3 Housing Rehabilitation
	Goal Description	Promote and assist in financing the preservation of existing owner- and renter-occupied housing stock in the City.
4.	Goal Name	HS-4 Rent and Utility Assistance
	Goal Description	Promote and assist in financing short-term rent and utility assistance programs for low- and moderate-income persons who are in danger of becoming homeless.
5.	Goal Name	HO-1 Housing
	Goal Description	Promote and assist in developing housing opportunities for homeless persons and households, and those who may be at-risk of becoming homeless.
6.	Goal Name	HO-2 Operations/Support
	Goal Description	Promote and assist in financing support services for the homeless and persons at-risk of becoming homeless.
7.	Goal Name	HO-3 Prevention and Rapid Re-Housing
	Goal Description	Promote and assist in the prevention of homelessness through anti-eviction and other programs for rapid re-housing.
8.	Goal Name	SN-1 Housing
	Goal Description	Promote and assist to increase the supply of affordable, decent, safe, sound, and accessible housing for the elderly, persons with disabilities, persons with HIV/AIDS, victims of domestic violence, persons with alcohol/drug dependency, and persons with other special needs through rehabilitation of existing housing and new construction of accessible housing.
9.	Goal Name	SN-2 Social Services

	Goal Description	Promote and assist in supporting social service programs and facilities for the elderly, persons with disabilities, persons with HIV/AIDS, victims of domestic violence, persons with alcohol/drug dependency, and persons with other special needs.
10.	Goal Name	SN-3 Accessibility
	Goal Description	Promote and assist in making accessibility improvements to owner occupied housing through rehabilitation and improve renter occupied housing by promoting reasonable accommodations for the physically disabled.
11.	Goal Name	CD-1 Infrastructure
	Goal Description	Improve the City's infrastructure through reconstruction and new construction of streets, walks, curbs, ADA ramps, retaining walls, sewer, water, storm water management, bridges, bike trails, green infrastructure, etc.
12.	Goal Name	CD-2 Community Facilities
	Goal Description	Improve the City's parks, recreational centers, community centers, and public community facilities through rehabilitation and new construction.
13.	Goal Name	CD-3 Public Services
	Goal Description	Improve and increase public service programs for the youth, the elderly, disabled, and in general, public service programs for low- and moderate-income persons.
14.	Goal Name	CD-4 Food Programs
	Goal Description	Provide assistance for food and nutritional programs for low- and moderate-income persons.
15.	Goal Name	CD-5 Public Transit
	Goal Description	Promote the development of additional bus routes and improve public transportation for low- and moderate-income persons.
16.	Goal Name	CD-6 Demolition and Clearance
	Goal Description	Remove and eliminate slum and blighting conditions through demolition of vacant, dilapidated, and abandoned structures throughout the City.
17.	Goal Name	CD-7 Architectural Barriers
	Goal Description	Remove architectural barriers and make public and community facilities accessible to persons with physically disabled.
18.	Goal Name	CD-8 Public Safety

	Goal Description	Improve public safety through upgrades to facilities, purchase of new equipment, firefighting and prevention, crime prevention, community policing, and ability to respond to emergency situations.
19.	Goal Name	ED-1 Employment
	Goal Description	Support and encourage new job creation, job retention, workforce development, employment, and job training services for the unemployed and underemployed persons.
20.	Goal Name	ED-2 Financial Assistance
	Goal Description	Support business and commercial growth through expansion and new development with technical assistance and low interest loan programs.
21.	Goal Name	ED-3 Redevelopment Program
	Goal Description	Plan and promote the development and redevelopment of vacant commercial and industrial sites and facilities, and the revitalization efforts in the Greater Five Points Redevelopment Area and other residential neighborhoods.
22.	Goal Name	APM-1 Overall Coordination
	Goal Description	Provide program management and oversight for the successful administration of Federal, state, and local funded programs, including planning services for special studies, environmental clearance, fair housing, performance evaluation, monitoring, and compliance with all Federal, state, and local laws and regulations.
23.	Goal Name	APM-2 Fair Housing
	Goal Description	Provide funds for training, education, outreach, and monitoring to affirmatively further fair housing in the City of New Bern.

Estimate the number of extremely low-income, low-income, and moderate-income families to whom the jurisdiction will provide affordable housing as defined by HOME 91.315(b)(2)

The City of New Bern proposes to assist the following:

- **Extremely Low Income** – 0 households
- **Low Income** – 1 households
- **Moderate Income** – 3 households

SP-50 Public Housing Accessibility and Involvement – 91.215(c)**Need to Increase the Number of Accessible Units (if Required by a Section 504 Voluntary Compliance Agreement)**

The Housing Authority of the City of New Bern currently has no requests to make Section 504 accommodations. The Housing Authority has made these accommodations in the past, and is not under a Voluntary Compliance Agreement.

There are currently 1,300 people on the Section 8 waiting list through Twin Rivers Opportunities, Inc. There are 5 applicants on the Public Housing waiting list that identified as elderly and 17 that identified as near elderly. It would be reasonable to assume that the percentage of elderly applicants on the waiting list will be increasing, based on the numbers of applicants that identify as near elderly.

Activities to Increase Resident Involvements

According to the Five Year and Annual Plan for 2023-2028, NBHA's progress in meeting their mission and goals states that NBHA set the goal of cooperating with the City of New Bern and other neighborhood partners to promote neighborhood revitalization and economic development in designated areas of the City, as evidenced by the resident input in the development of the Gateway Renaissance Plan and Greater Five Points Transformation Plan. New Bern Towers has an active resident council that expresses needs for both the New Bern Towers community and the public housing under the Housing Authority of the City of New Bern as a whole. Trent Court formerly had an active resident council, but Hurricane Florence caused the council to disband, and the residents of Trent Court have struggled to restore it.

Is the public housing agency designated as troubled under 24 CFR part 902?

The Housing Authority of the City of New Bern is not designated as troubled.

Plan to remove the 'troubled' designation

Not Applicable.

SP-55 Barriers to affordable housing – 91.215(h)

Barriers to Affordable Housing

The following Impediments to Fair Housing Choice along with recommendations to address any impediment are presented to assist the City of New Bern to affirmatively further fair housing in the community. There previously were no identified Impediments to Fair Housing Choice. New impediments to Fair Housing Choice are presented on the pages that follow. Several ongoing impediments are present in the City of New Bern, despite the City's best efforts, and based on economic conditions, will continue to be addressed by the City of New Bern. Below is a list of impediments that were developed as part of New Bern's 2024 Analysis of Impediments to Fair Housing Choice.

- **Impediment 1: Fair Housing Education and Outreach -**

There is a continuing need to educate persons about their rights under the Fair Housing Act and to raise community awareness to affirmatively further fair housing choice.

Goal: All residents of the City of New Bern will have an awareness and knowledge of their rights under the Fair Housing Act and the City will continue to affirmatively further fair housing, especially for low-income residents, minorities, and the disabled population.

- **Impediment 2: Affordable Rental Housing -**

The City of New Bern has housing that is not necessarily affordable to lower income households. The monthly housing cost for apartments has steadily increased to the point that over 36.3% of all households in New Bern are considered cost burdened.

Goal: The development of affordable rental housing will occur throughout the City of New Bern, especially for households whose income is less than 50% AMI, through new construction, in-fill housing, the rehabilitation of vacant buildings, and the development of mixed-income housing, to reduce the number of lower income households who are cost burdened.

- **Impediment 3: Affordable Housing for Sale -**

The median value and cost to purchase a single family home in New Bern that is decent, safe, and sound, has increased significantly to over \$344,000 (2024 dollars), which limits the choice of housing for lower income households throughout the City.

Goal: Development of for-sale, single family homes for lower income households will occur through new construction, in-fill housing, and the rehabilitation of vacant structures throughout the City of New Bern.

- **Impediment 4: Accessible Housing Units -**

As an older, built-up urban environment, there is a lack of accessible housing units and limited developable sites in the City of New Bern, since 26.4% of the City's housing units were built before

1960 and most do not contain accessibility features, and 15.1% of the City's population is classified as disabled.

Goal: The number of accessible housing units in the City will be increased through new construction and rehabilitation of existing housing units for the physically disabled and developmentally challenged population.

- **Impediment 5: Private Lending Practices -**

The HMDA data indicates that there may be a disparity between the approval rates of home mortgage loans originated from minorities and those originated from non-minority applicants.

Goal: Approval rates for all originated home mortgage loans will be fair, unbiased and equal, regardless of race, familial status, and location.

- **Impediment 6: Economic Issues Affect Housing Choice -**

There is a need to increase economic opportunities in the City to improve household income so lower income households have the ability to live outside areas with concentrations of low-income, which makes this a fair housing concern.

Goal: The local economy will provide new job opportunities, which will increase household income, and will promote fair housing choice throughout the City of New Bern.

Strategy to Remove or Ameliorate the Barriers to Affordable Housing

The City has developed the following strategies to remove or ameliorate the Barriers to Affordable Housing:

Goal # 1 Strategy:

- **1-A:** Promote fair housing awareness through the media, seminars, and training to provide educational opportunities for all persons to learn more about their rights under the Fair Housing Act, Americans With Disabilities Act, and the Visitability Tax Credit Program.
- **1-B:** Provide and distribute literature and informational material concerning fair housing issues, an individual's housing rights, and the landlords' responsibilities to affirmatively further fair housing, including laws regarding reasonable modifications and accommodations.
- **1-C:** Support and provide funding for independent fair housing organizations to provide testing services, education, outreach, referrals, and assistance in addressing fair housing complaints that may arise in the City.

Goal # 2 Strategy:

- **2-A:** Support and encourage both private developers and non-profit housing providers to develop plans for the construction of new affordable and mixed income rental housing.
- **2-B:** Support and encourage the rehabilitation of the existing housing stock and new housing in the City so it becomes decent, safe, and sound rental housing that is affordable to lower income households.
- **2-C:** Support and encourage the development of independent housing and community living arrangements for the disabled in the City.
- **2-D:** Provide financial assistance in the form of development subsidies so low-income households that are cost burdened, particularly those households whose incomes are at or below 50% AMI, are able to afford decent, safe, and sound housing.
- **2-E:** Promote partnerships with the New Bern Housing Authority and private and non-profit housing developers to construct additional Low Income Housing Tax Credit (LIHTC) multi-family, rental housing in high opportunity areas of the City.
- **2-F:** Promote Section 8 Housing Choice Voucher use throughout the City.

Goal # 3 Strategy:

- **3-A:** Support and encourage plans from both private developers and non-profit housing providers to develop and construct new affordable housing that is for sale for lower income households throughout the City of New Bern.
- **3-B:** Support homebuyer education and training programs to improve homebuyer awareness and increase the opportunities for lower income households to become homebuyers by affirmatively furthering fair housing choice.

Goal # 4 Strategy:

- **4-A:** Increase the amount of accessible housing through new construction of handicap units that are accessible and visitable.
- **4-B:** Continue to enforce the ADA and Fair Housing requirements for landlords to make "reasonable accommodations" to their rental properties so they become accessible to tenants who are physically disabled.
- **4-C:** Provide financial assistance to elderly homeowners in the City to make accessibility improvements to their properties in order for these residents to remain in their own homes.

Goal # 5 Strategy:

- **5-A:** The City should consider using Federal and State funding to provide housing or credit counseling to potential low- and moderate-income homebuyers in impacted neighborhoods to

decrease the number of denials due to poor credit, debt to income ratios, or incomplete applications.

- **5-B:** The City should consider entering into an agreement with Legal Aid of North Carolina to perform testing to determine if any patterns of discrimination are present in home mortgage lending practices for minorities and other protected classes when they wish to purchase properties located in impacted areas of the City.
- **5-C:** The City should consider using Federal and State funding to provide a higher rate of public financial assistance to potential homebuyers in impacted neighborhoods to improve the loan to value ratio, so that private lenders will increase the number of loans made in these areas.

Goal # 6 Strategy:

- **6-A:** Strengthen partnerships and program delivery to enhance the City's business base, expand its tax base, and create a more sustainable economy for all residents and businesses.
- **6-B:** Support and enhance workforce development and skills training that will result in a "livable" wage and increase job opportunities.

Eastern North Carolina lags behind the urban centers of the state economically. As a result, low- and moderate-income people have less income, and housing affordability is a greater issue in the area for all residents. Residents in protected classes can face even more housing affordability challenges, particularly when they cannot prove discrimination.

The most common fair housing complaint in the City of New Bern, as is the case nationally, is on the basis of disability. In Eastern North Carolina, there have been multiple instances of residents that faced evictions because landlords were unwilling to provide reasonable accommodations.

Transportation is a common barrier to affordable housing in the area. The local public transit system is unreliable and limited in routes. To access services and employment, residents must live near service providers and employers.

One of the major barriers to affordable housing in the City of New Bern is that cases go largely unreported. Though there are likely more instances of discrimination in the area, very few complaints are filed, and little data is available on the types of complaints.

Though it has been six years since Hurricane Florence, fair housing in the region is still recovering from its damage. Many affordable housing units were destroyed in the Hurricane, resulting in the relocation of low- and moderate-income people. Following these relocations, people often found themselves farther away from the services that they needed.

The City of New Bern intends to address housing affordability issues with the construction of new affordable housing. New construction will increase the supply for housing for low- and moderate-income persons. Additional units will also be targeted to housing those displaced by Hurricane Florence.

The Housing Authority of the City of New Bern provides reasonable accommodations for its residents upon request. There is a need for additional accessibility improvements, which the City will undertake over the course of the Five Year Consolidated Plan.

The City of New Bern intends to partner with CARTS, the local transit agency, to improve services and transit-related infrastructure. CARTS has adopted a strategic transit plan to increase ridership, which the City will support with supplemental infrastructure projects.

To address the issue of unreported complaints, the City will conduct education and outreach on fair housing so that residents can know their rights and be aware of the instances when those rights are violated.

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SP-60 Homelessness Strategy – 91.215(d)

Reaching out to homeless persons (especially unsheltered persons) and assessing their individual needs

The 2023 Point-In-Time Count revealed that as of January 2023, 43 homeless individuals resided in Craven County. 35 of these persons resided in Emergency Shelter in January 2023, none (0) in Transitional Housing, and eight (8) were unsheltered. The majority of the homeless persons (34 of the 43) were single adults age 25 or older; there was one (1) single adult between 18 and 24, and the balance belonged to three (3) families with a total of three (3) adults over the age of 25, one (1) adult between the ages of 18 and 24, and three (3) children age 17 and under. There were no (0) unaccompanied youth experiencing homelessness. Of the full group, one (1) adult and no (0) children out of the 43 individuals were considered chronically homeless, eleven (11) were veterans, and one (1) household was a Youth Household with every member under 25 years of age. This indicates a need for greater outreach and shelter/housing options for veterans and families in particular.

Families with children – The Point-In-Time count for 2020 only counted 1 homeless household with 3 persons. However, in 2023 there were 3 families with children counted among the homeless population with a total of 8 people.

Veterans and their families – There are large numbers of Veterans and support systems because of the nearby military base in Havelock. Homeless Veterans often require additional services, with mental health services being the most commonly cited need. The number of homeless Veterans in Craven County decreased from 11 in 2016 to a low of 2 in 2020, but has risen back to 11 in 2023.

Unaccompanied youth – Teens aging out of foster care and young adults in the 18-24 transition stage can be hard to locate. Many of them are staying with friends and family temporarily and are technically homeless. Unaccompanied youth may also move between different shelters. For these reasons, no unaccompanied youth were reported in the 2023 PIT count.

The CoC utilizes Coordinated Entry to track the various subpopulations and divides them up into 13 local referral zones across the 79 counties that the CoC serves. Much of the area served by the CoC is rural, and the CoC creates advertisements and hotlines to target these subpopulations and allow them to access the Coordinated Entry process.

Addressing the emergency and transitional housing needs of homeless persons

The 2023 Point-In-Time Count saw a rise in homelessness in Craven County following the Covid-19 pandemic and the expiration of pandemic-focused aid programs. Though many of the barriers to emergency housing in the City of New Bern and Craven County had been removed in response to Hurricane Florence, it remains a challenge to rapidly re-house families. According to the Point-In-Time count for 2020 (counted in January 2020 before the emergence of the Covid-19 pandemic), there was 1

homeless household with 3 persons. There were 21 homeless persons counted overall, and all 21 homeless persons counted were in emergency shelters. In 2023, there was 3 homeless households with children totaling 8 persons. There were 43 homeless persons counted overall, and 35 homeless persons counted were in emergency shelters.

Religious Community Services provides much of the shelter space for individuals and families in the County while also partnering with Craven Community College for job training and Craven-Pamlico Re-Entry to assist ex-offenders with housing, transportation, and vocational skills. NCWorks provides job training and assists in housing homeless veterans. Coastal Women's Shelter partners with local landlords to provide stable housing and keep children of families experiencing domestic violence in the same schools to assist these children in maintaining stability. Crossroads is the major mental health provider in the area, but the need for mental health care far surpasses the amount of assistance that Crossroads can provide. The following shelter beds are available in Craven County:

Religious Community Services has 37 total beds, with the following emergency shelter beds for target homeless populations:

- **Homeless Families** – 12 beds
- **Homeless Women** – 6 beds
- **Homeless Veterans** – 5 beds

The Coastal Women's Shelter prioritizes providing safe, affordable housing for victims of domestic violence. The shelter has 19 total beds, 3 of which are infant cribs and 6 of which are for unaccompanied domestic violence victims. The Coastal Women's Shelter will work with trusted landlords to place people in housing, but there is a shortage of trusted landlords.

Helping homeless persons (especially chronically homeless individuals and families, families with children, veterans and their families, and unaccompanied youth) make the transition to permanent housing and independent living, including shortening the period of time that individuals and families experience homelessness, facilitating access for homeless individuals and families to affordable housing units, and preventing individuals and families who were recently homeless from becoming homeless again.

The North Carolina Balance of State CoC's written standards focus on a Housing First model and follow the best practices of that model. The written standards utilize several strategies to increase the number of people who exist Emergency Shelter, Transitional Housing, and Rapid Re-housing to Permanent Housing destinations. Evaluations of these standards will be based on the length-of-time homeless of an individual or family in Emergency Shelter, Transitional Housing, or Rapid Re-Housing. The CoC will seek to make progress on the turnover rate of individuals and families, the targeting of individuals and families based on risk, and the number of positive exits into Permanent Housing

The CoC Steering Committee has approved written standards that conform to best practices for Street Outreach, Emergency Shelter, Transitional Housing, Prevention and Rapid Rehousing, Permanent Supportive Housing, and Coordinated Entry Programs on September 6, 2016 and last updated these standards on November 2, 2021. There are additional policies for follow-ups to those that have exited Rapid Re-Housing, Anti-Discrimination, and Emergency Transfers based on the Violence Against Women Act (VAWA). The Balance of State CoC provides additional guidance to rural Continuums of Care.

The number of homeless Veterans in Craven County has risen from 2 in 2021, to 5 in 2022, and 11 in 2023. In addition to housing, there is a need for wrap around services for veterans. These services largely include mental health care and recovery systems for those with addictions. There are a number of instances of PTSD in the area due to the presence of the military base.

Help low-income individuals and families avoid becoming homeless, especially extremely low-income individuals and families who are likely to become homeless after being discharged from a publicly funded institution or system of care, or who are receiving assistance from public and private agencies that address housing, health, social services, employment, education or youth needs

Discharge policies at local hospitals are designed to prevent those leaving the hospitals from being referred to Religious Community Services. Religious Community Services supports the homeless in the community through operating emergency shelters and food and clothing services for those in need. By providing other supportive services, Religious Community Services intends to assist people who may be extremely low income and help feed and clothe them so that other family income may go to rent.

Local services such as Craven-Pamlico Re-Entry Council, Children's Developmental Services Agency, and Carolina East Health work with various populations that are at-risk of becoming homeless. Wraparound services are necessary to prevent homelessness and encourage self-sufficiency. Discharge policies are also put in place to direct low-income individuals who are at risk of homelessness to services that may assist them. There is a need for additional caseworkers to expand these services.

SP-65 Lead based paint Hazards – 91.215(i)

Actions to address LBP hazards and increase access to housing without LBP hazards

The revised Federal lead-based paint regulations published on September 15, 1999 (24 CFR Part 35) have had a significant impact on many activities – rehabilitation, tenant based rental assistance, and property acquisition – supported by the CDBG program. The City of New Bern will comply with Title 24 Part 35: Lead-Based Paint Poisoning Prevention in Certain Residential Structures (Current Rule).

If the City of New Bern would implement a housing rehabilitation program using Federal funds, the City of New Bern will ensure that:

- Applicants for rehabilitation funding receive the required lead-based paint information and understand their responsibilities.
- Staff properly determines whether proposed projects are exempt from some or all lead-based paint requirements.
- The level of federal rehabilitation assistance is properly calculated and the applicable lead-based paint requirements determined.
- Properly qualified personnel perform risk management, paint testing, lead hazard reduction, and clearance services when required.
- Required lead hazard reduction work and protective measures are incorporated into project rehabilitation specifications.
- Risk assessment, paint testing, lead hazard reduction, and clearance work are performed in accordance with the applicable standards established in 24 CFR Part 35.
- Required notices regarding lead-based paint evaluation, presumption, and hazard reduction are provided to occupants and documented.
- Program documents establish the rental property owner's responsibility to perform and document ongoing lead-based paint maintenance activities, when applicable.

Program staff monitors owner compliance with ongoing lead-based paint maintenance activities, when applicable.

How are the actions listed above related to the extent of lead poisoning and hazards?

The City is prioritizing new construction over housing rehabilitation to meet its housing needs. The construction of new housing will mitigate the risks of lead poisoning due to the use of paint that is not lead-based. If the City implements a housing rehabilitation program during this five year consolidated plan period, it will ensure that the aforementioned steps are taken.

How are the actions listed above integrated into housing policies and procedures?

If the City of New Bern implements a housing rehabilitation program, the City of New Bern will ensure that:

- Applicants for homeownership assistance receive adequate information about lead-based paint requirements.
- Staff properly determines whether proposed projects are exempt from some or all lead based paint requirements.
- A proper visual assessment is performed to identify deteriorated paint in the dwelling unit, any common areas servicing the unit, and exterior surfaces of the building or soil.
- Prior to occupancy, properly qualified personnel perform paint stabilization and the dwelling passes a clearance exam in accordance with the standards established in 24 CFR Part 35.
- The home purchaser receives the required lead-based paint pamphlet and notices.

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SP-70 Anti-Poverty Strategy – 91.215(j)

Jurisdiction Goals, Programs and Policies for reducing the number of Poverty-Level Families

According to the 2018-2022 American Community Survey, 16.5% of all people in the City of New Bern have incomes below the poverty level. Additionally, 47.4% of female-headed households with children with no spouse present live in poverty, which rises to 95.3% when the children are under 5 years old. Individuals living on the threshold of poverty were faced with a collection of obstacles that prevent them from escaping their situation. Some may need adequate affordable housing, job skills training, day care for children, treatment for medical or substance abuse issues or they may be children and adults with educational needs. The City's goal is to reduce the extent of poverty by actions the City can control and through work with other agencies/organizations.

The resources and opportunities that the City has for reducing the number of families with incomes below the poverty line are limited. Since poverty is a function of income, its effect on housing opportunity and choice is apparent. Conversely, without adequate, stable housing, alleviating poverty is more difficult. Still, the means of addressing both issues are fragmented. Several structural barriers to poverty are addressed through different local policies. For example, the City has a policy that requires the employment of Section 3 households in construction contracts when possible.

More direct efforts to alleviate poverty by combining case management, social services job training, and housing assistance are becoming more common. City and county social service agencies have become more committed to the continuum of care models being introduced across the country. As these agencies become more proficient at providing services to the needy, the poverty rates will decline.

The City's anti-poverty strategy is based on attracting a range of businesses and supporting workforce development including job-training services for low-income residents. In addition, the City's strategy is to provide supportive services for target income residents.

Planned economic development programs include:

- **ED-1 Employment** – Support and encourage new job creation, job retention, workforce development, employment, and job training services for the unemployed and underemployed persons.
- **ED-2 Financial Assistance** – Support business and commercial growth through expansion and new development with technical assistance and low interest loan programs.
- **ED-3 Redevelopment Program** – Plan and promote the development and redevelopment of vacant commercial and industrial sites, and facilities, and the revitalization efforts in the Greater Five Points Redevelopment Area and other residential neighborhoods.

How are the Jurisdiction poverty reducing goals, programs, and policies coordinated with this affordable housing plan

Providing access and increasing the supply of affordable housing is integrally tied to the City's anti-poverty strategy. The most successful way to implement this is through job training/creation activities while providing affordable housing.

Until an official directive on the matter is received from the Federal and state agencies responsible for these entitlement programs, the City will try to induce the local program coordinators to confer on the matter and develop local strategies.

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SP-80 Monitoring – 91.230

Describe the standards and procedures that the jurisdiction will use to monitor activities carried out in furtherance of the plan and will use to ensure long-term compliance with requirements of the programs involved, including minority business outreach and the comprehensive planning requirements

The City of New Bern Community Development Coordinator has the primary responsibility for monitoring the City's Five Year Consolidated Plan and Annual Action Plan and will maintain records on the progress toward meeting the goals and the statutory and regulatory compliance of each activity. Service area documentation is maintained along with income surveys. Timeliness of expenditures is achieved through scheduling activities, drawdown of funds, and maintenance of budget spread sheets which indicate the dates of expenditures. Program modifications are considered if project activities are not able to be completed within the allowable time limits of the grant. The Community Development Coordinator is also responsible for the on-going monitoring of any sub-recipients for similar compliance.

The City of New Bern's Community Development Coordinator has a "monitoring checklist" that is utilized when programs and activities are reviewed. This checklist was developed in accordance with Sub-Part J of 24 CFR, Part 85 "Uniform Administrative Requirement for Grants and Cooperative Agreements of State and Local Governments" and the HUD Community Planning and Development Monitoring Handbook (HUD 6509.2)

CDBG funded activities are monitored periodically, during the construction phase, and a final inspection is performed which details the cost benefit and benefit to low- and moderate-income persons. During the on-site inspections, compliance with the local building and housing codes are reviewed. Copies of financial statements and audit reports are required and kept on file. For those activities which trigger Davis-Bacon Wage Rates, employee payrolls are required prior to payments and on-site employee interviews will be held. These monitoring standards are required for all City administered projects and sub-recipient activities.

For each activity authorized under the National Affordable Housing Act, the City of New Bern has established fiscal and management procedures that will ensure program compliance and fund accountability. Additionally, the Department will ensure that the reports to the U.S. Department of Housing & Urban Development (HUD) are complete and accurate.

The monitoring process is not a "one-time" event. The process is an on-going system of planning, implementation, communication and following up.

Expected Resources

AP-15 Expected Resources – 91.220(c)(1,2)

Introduction

The City of New Bern is receiving \$291,714 from CDBG funds. The program year goes from July 1, 2024 through June 30, 2025. These funds will be used to address the following priority needs:

- Community Development
- Administration, Planning, and Management

The expected amount of Federal funds available for the remainder of the Five-Year Consolidated Plan is based on the FY 2024 Federal Allocation times five (5) years, this amount does not include program income.

- **FY 2024** - CDBG = \$291,714.00
- **FY 2025** - CDBG = \$291,714.00
- **FY 2026** - CDBG = \$291,714.00
- **FY 2027** - CDBG = \$291,714.00
- **FY 2028** - CDBG = \$291,714.00
- **Totals - CDBG = \$1,458,570.00**

The yearly accomplishments of these projects/activities are reported in the FY 2024 Consolidated Annual Performance and Evaluation Report (CAPER) and then annually thereafter for the entire FY 2024-2028 Five Year Consolidated Plan period.

Anticipated Resources

Program	Source of Funds	Uses of Funds	Expected Amount Available Year 1				Expected Amount Available Remainder of Con Plan \$	Narrative Description
			Annual Allocation: \$	Program Income: \$	Prior Year Resources: \$	Total: \$		
CDBG	Public Federal	Acquisition Admin and Planning Economic Development Housing Public Improvements Public Services	\$291,714.00	\$0.00	\$0.00	\$291,714.00	\$1,166,856	Three (3) projects/activities were funded based on the FY 2024 CDBG allocation.

Table 52 - Expected Resources – Priority Table

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Explain how federal funds will leverage those additional resources (private, state and local funds), including a description of how matching requirements will be satisfied

In addition to the entitlement funds, the City of New Bern anticipates the following Federal resources may be available to local non-profit organizations to undertake the housing strategies identified in the Five Year Consolidated Plan.

- Supportive Housing Program
- Low-Income Housing Tax Credit Program (LIHTC)
- Section 8 Rental Assistance Program
- Public Housing Capital Fund Program
- Rental Assistance Demonstration (RAD)
- Economic Development Initiative (EDI) Community Project Funding (CPF) Congressionally Directed Funding

Private and non-Federal resources that may be available to the City of New Bern in FY 2024 to address needs identified in the FY 2024-2028 Five Year Consolidated Plan are listed below.

- **EDA Workforce Development Grant** – The United States Economic Development Administration fields a competitive application for workforce development funding.
- **Golden LEAF Funding** – This North Carolina grant supports workforce development in rural areas of the state of North Carolina that were once dependent on agriculture and tobacco farming.
- **Tobacco Trust Fund Grant** – The North Carolina Tobacco Trust Fund (NCTTFC) was created to assist current and former tobacco farmers, former quota holders, persons engaged in tobacco-related business, and individuals displaced from tobacco-related employment that were affected by the major tobacco settlement in 1998. These funds are used for projects that support employment for these groups.
- **Federal Home Loan Bank Affordable Housing Program (AHP)** – Congress has mandated that ten (10%) of the Federal Home Loan Bank's profits be allocated to provide affordable housing. The FHLB encourages its members to work with public agencies and non-profit housing development organizations in creating highly leveraged affordable housing initiatives. Both sales and rental housing are eligible.

If appropriate, describe publicly owned land or property located within the jurisdiction that may be used to address the needs identified in the plan

The City intends to build affordable housing on these lots. The lots are scattered throughout the Area. Some are buildable and meet the zoning requirements, others are not and will be transferred by sale or donation to adjacent property owners.

Discussion

Not Applicable.

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Annual Goals and Objectives

AP-20 Annual Goals and Objectives

Goals Summary Information

Sort Order	Goal Name	Start Year	End Year	Category	Geographic Area	Needs Addressed	Funding	Goal Outcome Indicator
1.	CD-1 Infrastructure	2024	2028	Non-Housing Community Development	Greater Five Points Low- and Moderate-Income Areas	Community Development	CDBG: \$168,372	Public Facility or Infrastructure Activities other than Low/Moderate Income Housing Benefit: 500 Persons Assisted Other: 1 Other
2.	CD-6 Demolition and Clearance	2024	2028	Non-Housing Community Development	Greater Five Points Low- and Moderate-Income Areas	Community Development	CDBG: \$65,000	Buildings Demolished: 5 Buildings
3.	APM-1 Overall Coordination	2024	2028	Administration	Greater Five Points Low- and Moderate-Income Areas	Administration, Planning, and Management	CDBG: \$58,342	Other: 1 Other
4.	APM-2 Fair Housing	2024	2028	Administration	Greater Five Points Low- and Moderate-Income Areas	Administration, Planning, and Management	CDBG: \$0	Other: 1 Other

Table 53 – Goals Summary

Goal Descriptions

1. Goal Name	CD-1 Infrastructure
Goal Description	Improve the City’s infrastructure through reconstruction and new construction of streets, walks, curbs, ADA ramps, retaining walls, sewer, water, storm water management, bridges, bike trails, green infrastructure, etc.
2. Goal Name	CD-6 Demolition and Clearance
Goal Description	Remove and eliminate slum and blighting conditions through demolition of vacant, dilapidated, and abandoned structures throughout the City.
3. Goal Name	APM-1 Overall Coordination
Goal Description	Provide program management and oversight for the successful administration of Federal, state, and local funded programs, including planning services for special studies, environmental clearance, fair housing, performance evaluation, monitoring, and compliance with all Federal, state, and local laws and regulations.
4. Goal Name	APM-2 Fair Housing
Goal Description	Provide funds for training, education, outreach, and monitoring to affirmatively further fair housing in the City of New Bern.

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Projects

AP-35 Projects – 91.220(d)

Introduction

The FY 2024 Annual Action Plan outlines the needs, resources, priorities and proposed activities of the City of New Bern to be undertaken with the FY 2024 Community Development Block Grant (CDBG). The City of New Bern has participated in CDBG as an Entitlement recipient since 2014.

The City’s Development Services Department is the Lead Agency that maintains and administers New Bern CDBG funds and responsibilities, including completion of the Annual Action Plan. The planning process actively encouraged participation of City housing and community service organizations, including the Housing Authority of the City of New Bern, Twin Rivers Opportunities, Inc., affordable housing providers, service agencies that assist the low- and moderate-income and principally low- and moderate-income clientele, advocates, and others.

The City of New Bern encourages citizens to provide input and participate in planning, implementation and assessment of the CDBG program. The FY 2024 Annual Action Plan was developed through public hearings, the use of existing data from previously approved plans and studies, consultation with local non-profit agencies, and discussions with other City of New Bern departments. For-profit, non-profit, community and faith-based organizations were engaged throughout the year to assess City needs and priorities.

The City of New Bern proposes to undertake the following activities with FY 2024 CDBG funds:

Projects

#	Project Name
1.	CDBG Administration
2.	Demolition and Clearance
3.	Street and Sidewalk Improvements

Table 54 – Project Information

Describe the reasons for allocation priorities and any obstacles to addressing underserved needs

The City of New Bern has allocated its CDBG funds based on principally benefiting Low/Mod income persons; or an activity in which predominantly low- and moderate-income areas or which has a presumed benefit; or an activity with an income requirement of low- and moderate-income persons. All allocated

funding has been utilized in a timely manner and within budget.

Many of the obstacles to addressing underserved needs are outside of the City's control. The largest obstacle is the lack of local, state, and federal resources available to the City of New Bern to adequately address these needs. This reduction in funds, combined with increasing numbers of individuals in need of housing, social service, homeless, or infrastructure support, unfortunately means that the City of New Bern is at a disadvantage in addressing underserved needs in the community. However, the City of New Bern maintains close cooperation with the County, the Housing Authority, housing providers, economic development agencies, and social service providers, to address any underserved needs in the City.

The proposed activities and projects for FY 2024 are located in areas of the City with the highest percentages of low- and moderate-income persons, and those block groups with a higher than average percentage of minority persons. The following census tracts and block groups have at least 51% of the households with low- and moderate-incomes, according to HUD's most recent analysis in 2020:

- C.T. 9605, B.G. 2
- C.T. 9606, B.G. 4
- C.T. 9608, B.G. 1
- C.T. 9608, B.G. 2
- C.T. 9608, B.G. 3
- C.T. 9608, B.G. 4
- C.T. 9609, B.G. 2

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AP-38 Project Summary

Project Summary Information

1. Project Name	CDBG Administration
Target Area	Low- and Moderate-Income Areas
Goals Supported	APM-1 Overall Coordination
Needs Addressed	Administration, Planning, and Management Priority
Funding	CDBG: \$58,342.00
Description	Overall program administration of the CDBG Programs, including: staff salaries, wages, and benefits; related costs to administer the programs including supplies, materials, mailings, duplications, etc.; monitoring and oversight; advertising and public hearing costs; market studies; planning activities and the preparation of the Annual Action Plan, Environmental Review Record, Consolidated Annual Performance and Evaluation Report, Fair Housing, etc.
Target Date	6/30/2025
Estimate the number and type of families that will benefit from the proposed activities	1 Organization
Location Description	Citywide
Planned Activities	The Matrix Code is 21A General Program Administration.
2. Project Name	Demolition and Clearance
Target Area	Low- and Moderate-Income Areas
Goals Supported	CDS-5 Clearance
Needs Addressed	Community Development Priority
Funding	CDBG: \$65,000.00
Description	Demolition of vacant substandard structures to remove slums and blight on a spot basis in the City.
Target Date	6/30/2025
Estimate the number and type of families that will benefit from the proposed activities	5 Structures

Location Description	To be determined.
Planned Activities	The National Objective is Slum and Blight Removal on a Spot Basis (SBS). The HUD Matrix Code is 04, Clearance and Demolition.
3. Project Name	Street and Sidewalk Improvements
Target Area	Greater Five Points
Goals Supported	CD-1 Infrastructure
Needs Addressed	Community Development Priority
Funding	CDBG: \$168,372.00
Description	CDBG funds will be used to reconstruct streets and make sidewalk improvements in the Five Points neighborhood.
Target Date	6/30/2025
Estimate the number and type of families that will benefit from the proposed activities	1 Other
Location Description	Citywide
Planned Activities	The National Objective is Low/Mod Area Benefit (LMA). The HUD Matrix Codes are 03K Street Improvements and 03L Sidewalks.

Table 55 – Project Summary

AP-50 Geographic Distribution – 91.220(f)

Description of the geographic areas of the entitlement (including areas of low-income and minority concentration) where assistance will be directed

The following information provides a profile of the population, age, and racial/ethnic composition of the City of New Bern. This information was obtained from the U.S. Census Bureau American Factfinder website, <http://data.census.gov>. The 2018-2022 American Community Survey 5-Year Estimates (ACS) were used to analyze the social, economic, housing, and general demographic characteristics of the City of New Bern. The Decennial Census and 5-year estimates are the most recent data available for the City. The 2020 Decennial Census data and 2013-2017 ACS data is included when necessary and for comparison.

Population

- The City's population was an estimated 31,373 according to the 2018-2022 ACS, a 5.8% increase from 29,664 in the 2013-2017 ACS.

Age

- The median age in New Bern is 40.4 years of age as of the 2018-2022 ACS estimates, up from 37.1 years in the 2013-2017 ACS.
- Youth under age 18 account for an estimated 22.9% of the total population.
- Seniors age 65 and over account for 18.9% of the total population.

Race/Ethnicity

Composition from the 2018-2022 American Community Survey:

- 56.6% of population is White
- 31.7% of population is Black or African American
- 6.5% of population is Asian
- 2.4% of population identify Two or More Races
- 6.7% is Hispanic or Latino (of any race).

Income Profile

The current Median Income for a family of four (4) in Craven County, North Carolina Metropolitan Statistical Area (MSA) is \$77,100 according to HUD's FY 2023 Income Limits. The following is a summary of income statistics for the City of New Bern:

- At the time of the 2018-2022 American Community Survey, the median household income in the City of New Bern was \$55,673 which was lower than the State of North Carolina (\$66,186).
- 40.9% of households have earnings received from Social Security income.
- 29.3% of households have earnings received from retirement income.
- 8.0% of households have earnings received from cash public assistance.

- 47.4% of female-headed households with children under 18 years were living in poverty.
 - 95.3% of female-headed households with children under 5 years were living in poverty.
- 24.6% of all youth under 18 years of age were living in poverty.

Low/Mod Income Profile

The low- and moderate-income profile for City of New Bern is a measurement of the area's needs. The City of New Bern has an overall low- and moderate-income percentage of 40.67%.

Economic Profile

The following illustrates the economic profile for the City of New Bern as of the 2018-2022 American Community Survey:

- Of the City’s population of 24,810 people 16 years and over, only 59.5% were in the labor force. 58.0% were employed in the civilian labor force and 1.6% were in the Armed Forces.
- Occupation:
 - 36.9% of the employed civilian population had management, business, science and arts occupations.
 - 22.4% had service occupations.
 - 18.5% had sales and office occupations.
- Industry:
 - 25.9% of employed civilian workers were in the educational services, and health care and social assistance industries.
 - 15.0% worked in the arts, entertainment, and recreation, and accommodation and food services industries.
 - 11.8% worked in the manufacturing industries.
- Class of Worker:
 - 78.6% of employed civilian workers were classed as private wage and salary workers.
 - 17.9% were classed as government workers.

According to the U.S. Labor Department, the preliminary unadjusted unemployment rate for the City of New Bern in January of 2024 was 3.6%. New Bern’s unemployment rate matched the January 2024 rate of the State of North Carolina at 3.6%, and both were lower than the national unadjusted rate of 4.2%.

Geographic Distribution

Target Area	Percentage of Funds
Low- and Moderate-Income Areas	67%
Greater Five Points	33%

Table 56 - Geographic Distribution

Rationale for the priorities for allocating investments geographically

The proposed activities and projects for FY 2024 are located in areas of the City with the highest percentages of low- and moderate-income persons, and those block groups with a higher than average percentage of minority persons. The following census tracts and block groups have at least 51% of the households with low- and moderate-incomes:

- C.T. 9605, B.G. 2
- C.T. 9606, B.G. 4
- C.T. 9608, B.G. 1
- C.T. 9608, B.G. 2
- C.T. 9608, B.G. 3
- C.T. 9608, B.G. 4
- C.T. 9609, B.G. 2

The total amount of FY 2024 CDBG funds available is \$291,714 of which 20.0% (\$58,342) is for administration and 80.0% (\$233,372) is allocated for project activities. Approximately 72% (\$168,372) of funds for project activities will principally benefit low- and moderate-income persons, while 28% (\$65,000) will be used for slum and blight removal.

Discussion

The geographic locations and the public benefit for the FY 2024 CDBG Activities are as follows:

- **General Administration** - 303 First Street, New Bern, NC 28560
- **Demolition/Clearance** - Citywide; To be determined.; Slum and Blight Removal on a Spot Basis (SBS)
- **Street and Sidewalk Improvements** – Greater Five Points Neighborhood; To be determined.; Low/Mod Area Benefit (LMA)

Affordable Housing

AP-55 Affordable Housing – 91.220(g)

Introduction

One Year Goals for the Number of Households to be Supported	
Homeless	0
Non-Homeless	0
Special-Needs	0
Total:	0

Table 57 - One Year Goals for Affordable Housing by Support Requirement

One Year Goals for the Number of Households Supported Through	
Rental Assistance	0
The Production of New Units	0
Rehab of Existing Units	0
Acquisition of Existing Units	0
Total:	0

Table 58 - One Year Goals for Affordable Housing by Support Type

Discussion

During this program year, the City is not funding any affordable housing projects/activities with CDBG funds.

AP-60 Public Housing – 91.220(h)

Introduction

The Housing Authority of the City of New Bern's mission is:

- Providing affordable housing opportunities in a safe environment
- Revitalizing and maintaining neighborhoods
- Providing opportunities for low and moderate-income homeownership
- Forming effective partnerships to maximize housing, social, and economic opportunities
- Continuing its partnership with the City of New Bern for the revitalization of communities
- Pursuing funding for the development of affordable housing for the residents of New Bern

The Housing Authority of the City of New Bern owns and professionally manages family communities and elderly/disabled rental apartments. NBHA has one (1) public housing development: Trent Court. NBHA had also previously owned a second property: Craven Terrace. This property was sold.

Before Hurricane Florence hit the City, NBHA had a total of 218 public housing units in Trent Court, with 11 accessible units. After Hurricane Florence caused extensive flooding, the Housing Authority was left with 110 units at Trent Court, of which 4 are accessible. In the years following the hurricane, the Authority focused its efforts on repairing the inhabitable structures and securing the uninhabitable ones. Trent Court's waiting list is open.

NBHA also owns and manages Section 8 Housing for elderly residents in New Bern Towers. There are 106 units in New Bern Towers, which also received repairs after Hurricane Florence. The Towers' waiting list also remains open.

Twin Rivers Opportunities, Inc. assists families who wish to live in privately owned housing and receive rental subsidy through the Housing Choice Voucher Program instead of NBHA. Twin Rivers Opportunities, Inc. administers 995 vouchers. There are currently 1,300 households on the waiting list for Housing Choice Vouchers and the waiting list is open.

Carolina Avenue Apartments is an 84-unit Low-Income Housing Tax Credit affordable apartment complex built in 2021. Utilizing its instrumentality, Better Visions Housing Corporation, Inc. (Better Visions), the New Bern Housing Authority partnered with Mosaic Development Group, Inc. on this project. Excel Management Group currently operates the leasing and management of the property.

Actions planned during the next year to address the needs to public housing

During this program year the Housing Authority will continue to maintain its 110 units. The Housing Authority continues to look for more buildable sites for affordable housing and to promote its self-sufficiency programming for its residents.

Actions to encourage public housing residents to become more involved in management and participate in homeownership

According to the Annual Plan for 2023, NBHA's progress in meeting their mission and goals states that NBHA set the goal of cooperating with the City of New Bern and other neighborhood partners to promote neighborhood revitalization and economic development in designated areas of the City, as evidenced by the resident input in the development of the Gateway Renaissance Plan and Greater Five Points Transformation Plan. New Bern Towers has an active resident council that expresses needs for both the New Bern Towers community and the public housing under the Housing Authority of the City of New Bern as a whole. Trent Court formerly had an active resident council, but Hurricane Florence in 2017 caused the council to disband, and the residents of Trent Court have struggled to restore it in the years since.

The Housing Authority of the City of New Bern does not support any homeownership initiatives. NBHA previously held homeownership classes in Trent Court and Craven Terrace, and these classes had active participation. However, these classes have ceased since Craven Terrace was sold.

Twin Rivers Opportunities, Inc. runs the Family Self-Sufficiency (FSS) Program. The program gives Section 8 voucher holders the opportunity to set and reach goals that they set for themselves and their families, as well as save a significant amount of money. Section 8 voucher holders may also use their vouchers to realize the American dream of becoming a homeowner. Both of these opportunities are available to Section 8 holders who choose to become participants in Section 8's Family Self-Sufficiency Program. There are two parts to the program. The first part of the program is the Self-Sufficiency program where participants have the opportunity to work towards and meet goals that they set for their families as well as save money that will become theirs when they have completed their goals. The second part of the program is the Homeownership Program. In this part of the program, a Section 8 participant can choose to use his or her Section 8 voucher to assist with the purchase and payment of a home.

If the PHA is designated as troubled, describe the manner in which financial assistance will be provided or other assistance

The Housing Authority of the City of New Bern is not designated as a troubled housing authority.

Discussion

The Housing Authority of the City of New Bern is continuing to meet its goals by securing funding through RAD and CNI for the revitalization of the Greater Five Points area. The Housing Authority will also continue to apply for funding for additional affordable housing.

Trent Court, one of the Housing Authority's public housing communities, was severely affected by

Hurricane Florence. The residents displaced by the Hurricane have been given Section 8 Housing Choice Vouchers. Twin Rivers Opportunities, Inc. has ensured the placement of these residents.

DRAFT

AP-65 Homeless and Other Special Needs Activities – 91.220(i)

Introduction

The North Carolina Coalition to End Homelessness is the collaborative applicant for the North Carolina Balance of State Continuum of Care. The 79 counties covered by the Continuum of Care are divided into 13 regions. The City of New Bern falls under the purview of Region 13 of the CoC, which is known as the Housing Alliance of Coastal Carolina (HACC) and includes Carteret, Craven, Jones, Onslow, and Pamlico Counties.

The leadership of Region 13 is responsible for acting as a member of the Balance of State CoC Steering Committee, the Coordinated Entry lead for the Region, the Point-in-Time and Housing Inventory Count lead for the region and reviewing projects and processing state ESG grants for the regional geography.

The City of New Bern works closely with the homeless service providers within the City to identify and resolve issues of homelessness within the community. The Department of Development Services partners with statewide entities, as well as the local service providers including Religious Community Services, Coastal Women's Shelter, and Reviving Lives Ministries.

The 2023 Point-In-Time Count revealed that as of January 2023, 43 homeless individuals resided in Craven County. There was no data available for the City of New Bern specifically. 35 of these persons resided in Emergency Shelter in January 2023, while 8 were unsheltered. The majority of the homeless persons (34 of the 43) were single adults age 25 or older; there was one single adult between 18 and 24, and the balance belonged to three families with a total of three adults over the age of 25, one adult between the ages of 18 and 24, and three children age 17 and under. There were no unaccompanied children experiencing homelessness at the time of the 2023 PIT count in Craven County.

The 2024 Point-In-Time Count was completed in January 2024, but the data is still being analyzed.

The following shelters are open in the City of New Bern during FY 2024.

- Religious Community Services - Emergency Crisis Shelter
- Religious Community Services - Families in Transition
- Religious Community Services - Veterans Transition Shelter
- Women's Coastal Shelter - Domestic Violence Shelter
- Reviving Lives Ministries - Addiction Recover Shelter

The FY 2024 CoC awards have not yet been announced.

Describe the jurisdictions one-year goals and actions for reducing and ending homelessness including: Reaching out to homeless persons (especially unsheltered persons) and assessing their individual needs

The 2023 Point-In-Time Count revealed that as of January 2023, 43 homeless individuals resided in Craven County. 35 of these persons resided in Emergency Shelter in January 2023, none (0) in Transitional Housing, and eight (8) were unsheltered. The majority of the homeless persons (34 of the 43) were single adults age 25 or older; there was one (1) single adult between 18 and 24, and the balance belonged to three (3) families with a total of three (3) adults over the age of 25, one (1) adult between the ages of 18 and 24, and three (3) children age 17 and under. There were no (0) unaccompanied youth experiencing homelessness. Of the full group, one (1) adult and no (0) children out of the 43 individuals were considered chronically homeless, eleven (11) were veterans, and one (1) household was a Youth Household with every member under 25 years of age. This indicates a need for greater outreach and shelter/housing options for veterans and families in particular.

Families with children – The Point-In-Time count for 2020 only counted 1 homeless household with 3 persons. However, in 2023 there were 3 families with children counted among the homeless population with a total of 8 people.

Veterans and their families – There are large numbers of Veterans and support systems because of the nearby military base in Havelock. The NCWorks Career Center works both employment and housing issues for homeless Veterans. Homeless Veterans often require additional services, with mental health services being the most commonly cited need. The number of homeless Veterans in Craven County decreased from 11 in 2016 to a low of 2 in 2020, but has risen back to 11 in 2023.

Unaccompanied youth – Teens aging out of foster care and young adults in the 18-24 transition stage can be hard to locate. Many of them are staying with friends and family temporarily and are technically homeless. Unaccompanied youth may also move between different shelters. For these reasons, no unaccompanied youth were reported in the 2023 PIT count.

The CoC utilizes Coordinated Entry to track the various subpopulations and divides them up into 13 local referral zones across the 79 counties that the CoC serves. Much of the area served by the CoC is rural, and the CoC creates advertisements and hotlines to target these subpopulations and allow them to access the Coordinated Entry process.

Addressing the emergency shelter and transitional housing needs of homeless persons

The 2023 Point-In-Time Count saw a rise in homelessness in Craven County following the Covid-19 pandemic and the end of pandemic-focused aid programs. Though many of the barriers to emergency housing in the City of New Bern and Craven County had been removed in response to Hurricane Florence, it remains a challenge to rapidly re-house families. In the Point-In-Time count for 2020 (counted in January

before the emergence of the Covid-19 pandemic), there was 1 homeless household with children with a total of 3 persons. There were 21 homeless persons counted overall, and all 21 homeless persons counted were in emergency shelters. In 2021, there were no homeless households with children counted and a total of 16 homeless persons counted overall, all residing in emergency shelters. In 2022, there was 1 homeless household with children with 4 persons. There were 26 homeless persons counted overall, and all 26 homeless persons counted were in emergency shelters. In 2023, there were 3 homeless households with children with 8 persons. There were 43 homeless persons counted overall with 35 in emergency shelters.

Religious Community Services provides much of the shelter space for individuals and families in the County while also partnering with Craven Community College for job training and Craven-Pamlico Re-Entry to assist ex-offenders with housing, transportation, and vocational skills. NCWorks provides job training and assists in housing homeless veterans. Coastal Women's Shelter partners with local landlords to provide stable housing and keep children of families experiencing domestic violence in the same schools to assist these children in maintaining stability. Crossroads is the major mental health provider in the area, but the need for mental health care far surpasses the amount of assistance that Crossroads can provide. The following shelter beds are available in Craven County:

Religious Community Services has 37 total beds, with the following emergency shelter beds for target homeless populations:

- **Homeless Families** – 12 beds
- **Homeless Women** – 6 beds
- **Homeless Veterans** – 5 beds

The Coastal Women's Shelter prioritizes providing safe, affordable housing for victims of domestic violence. The shelter has 19 total beds, 3 of which are infant cribs and 6 of which are for unaccompanied domestic violence victims. The Coastal Women's Shelter will work with trusted landlords to place people in housing, but there is a shortage of trusted landlords.

Helping homeless persons (especially chronically homeless individuals and families, families with children, veterans and their families, and unaccompanied youth) make the transition to permanent housing and independent living, including shortening the period of time that individuals and families experience homelessness, facilitating access for homeless individuals and families to affordable housing units, and preventing individuals and families who were recently homeless from becoming homeless again

The North Carolina Balance of State CoC's written standards focus on a Housing First model and follow the best practices of that model. The written standards utilize several strategies to increase the number of people who exist Emergency Shelter, Transitional Housing, and Rapid Re-housing to Permanent Housing destinations. Evaluations of these standards will be based on the length-of-time homeless of an individual

or family in Emergency Shelter, Transitional Housing, or Rapid Re-Housing. The CoC will seek to make progress on the turnover rate of individuals and families, the targeting of individuals and families based on risk, and the number of positive exits into Permanent Housing.

There are additional policies for follow-ups to those that have exited Rapid Re-Housing, Anti-Discrimination, and Emergency Transfers based on the Violence Against Women Act (VAWA). The Balance of State CoC provides additional guidance to rural Continuums of Care.

The number of homeless Veterans in Craven County has decreased from 11 in 2016, to 4 in 2017, 2 in 2020, went up slightly to 5 in 2022, and returned to 11 persons in 2023. In addition to housing, there is a need for wrap around services for veterans. These services largely include mental health care and recovery systems for those with addictions. There are a number of instances of PTSD in the area due to the presence of the military base. Twin Rivers Opportunities, Inc. received VASH vouchers for Veterans.

Helping low-income individuals and families avoid becoming homeless, especially extremely low-income individuals and families and those who are: being discharged from publicly funded institutions and systems of care (such as health care facilities, mental health facilities, foster care and other youth facilities, and corrections programs and institutions); or, receiving assistance from public or private agencies that address housing, health, social services, employment, education, or youth needs

Discharge policies at local hospitals are designed to prevent those leaving the hospitals from being referred to Religious Community Services. Religious Community Services supports homeless in the community through operating emergency shelters and food and clothing services for those in need. By providing other supportive services, Religious Community Services intends to assist people who may be extremely low income and help feed and clothe them so that other family income may go to rent.

Local services such as Craven-Pamlico Re-Entry Council, Children's Developmental Services Agency, and Carolina East Health work with various populations that are at-risk of becoming homeless. Wraparound services are necessary to prevent homelessness and encourage self-sufficiency. Discharge policies are also put in place to direct low-income individuals who are at risk of homelessness to services that may assist them. There is a need for additional caseworkers to expand these services.

Discussion

Not Applicable.

AP-75 Barriers to affordable housing – 91.220(j)

Introduction

Eastern North Carolina lags behind the urban centers of the state economically. As a result, low- and moderate-income people have less income, and housing affordability is a greater issue in the area for all residents. Residents in protected classes can face even more housing affordability challenges, particularly when they cannot prove discrimination.

The most common fair housing complaint in the City of New Bern, as is the case nationally, is on the basis of disability. In Eastern North Carolina, there have been multiple instances of residents that faced evictions because landlords were unwilling to provide reasonable accommodations.

Transportation is a common barrier to affordable housing in the area. The local public transit system is unreliable. To access services and employment, residents must live near service providers and employers.

One of the major barriers to affordable housing in the City of New Bern is that cases go largely unreported. Though there are likely more instances of discrimination in the area, especially in terms of disability, very few complaints are filed and little data is available on the types of complaints.

Hurricane Florence also affected access to fair housing in the region. Many affordable housing units were destroyed in the hurricane, and even after five years, not all of the units have been replaced. This has resulted in the relocation of low- and moderate-income people. Following these relocations, people often find themselves farther away from services.

Actions it planned to remove or ameliorate the negative effects of public policies that serve as barriers to affordable housing such as land use controls, tax policies affecting land, zoning ordinances, building codes, fees and charges, growth limitations, and policies affecting the return on residential investment

The Housing Authority of the City of New Bern provides reasonable accommodations for its residents upon request. There is a need for additional accessibility improvements, which the City will undertake over the course of the Five Year Consolidated Plan.

The City of New Bern will continue to partner with CARTS, the local transit agency, to improve services and transit-related infrastructure. CARTS has adopted a strategic transit plan to increase ridership, which the City will support with supplemental infrastructure projects.

To address the issue of unreported complaints, the City will conduct education and outreach on fair housing so that residents can know their rights and be aware of the instances when those rights are violated.

Discussion:

The City of New Bern proposes to undertake the following activities during the FY 2024 Program Year to affirmatively further fair housing:

- The City of New Bern will continue to work with the New Bern Housing Authority and Twin River Opportunities, Inc. to address issues of accessible housing.
- The City continues to work with Twin Rivers Opportunities, Inc. to mitigate the concentration of minority households and Section 8 Voucher holders.
- The City of New Bern continues to collaborate with Twin Rivers Opportunities, Inc. to implement strategies to provide consistent communication about the Section 8 Housing Choice Voucher program.
- The City of New Bern will partner with local agencies and groups to raise Fair Housing awareness and conduct fair housing trainings. Past groups that have conducted trainings include Legal Aid of North Carolina and the North Carolina Housing Coalition.

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AP-85 Other Actions – 91.220(k)

Introduction:

The City of New Bern has developed the following actions which address the obstacles to meeting underserved needs, fosters affordable housing, reduces lead-based paint hazards, reduces the number of families living in poverty, develops institutional structures, and enhances coordination between public and private housing and social service agencies.

Actions planned to address obstacles to meeting underserved needs

Despite efforts made by the City of New Bern and social service providers, a number of significant obstacles remain to meeting underserved needs. With funding resources being scarce, funding becomes the greatest obstacle for the City of New Bern to meet its underserved needs. Insufficient funding lessens the ability to fund many worthwhile public service programs, activities, and agencies. Through its planning efforts, the City will use its limited resources to address the City of New Bern's greatest needs and improve the quality of life for its residents. The following obstacles need to be overcome in order to meet underserved needs:

- Lack of decent, safe, sound, and affordable owner and renter housing.
- High cost of construction and rehabilitation work.
- Aging in place population who need accessibility improvements.
- Need for major rehabilitation of the City's aging housing stock.
- The increasing number of vacant and abandoned properties.
- Low wages in the service and retail sector job market.

Actions planned to foster and maintain affordable housing

To foster and maintain affordable housing, the City proposes the following Five-Year Goals and Strategies:

- **HS-1 Homeownership** – Promote and assist low- and moderate-income households who wish to become homeowners by providing down payment assistance, closing cost assistance, and requiring housing counseling training.
- **HS-2 Housing Construction** – Promote and assist in financing the development of affordable housing for both rental and for sales housing.
- **HS-3 Housing Rehabilitation** – Promote and assist in financing the preservation of existing owner and renter occupied housing stock in the City.
- **HS-4 Rent and Utility Assistance** – Promote and assist in financing short term rent and utility assistance programs for low- and moderate-income persons who are in danger of becoming homeless.

The City will partner with the Housing Authority of the City of New Bern, Twin Rivers Opportunities, Inc. and other fair housing agencies to promote fair housing in the city, through fair housing trainings, education, and promotions.

The City of New Bern will continue to work with the City's Human Rights Commission during this program year to again provide education and outreach.

Actions planned to reduce lead-based paint hazards

According to the 2018-2022 American Community Survey, 36.2% of the housing units in the City of New Bern were built before 1980 and are therefore at risk for containing lead-based paint. According to the North Carolina Department of Health and Human Services' 2019 Lead Surveillance Report, the last available, 2,335 children (ages birth-6 years) were tested in Craven County for elevated blood lead levels. Of those tested, six (6) had a blood lead level of 5-9 µg/dL and one (1) had a blood lead level of 10 µg/dL or greater. With 0.30% of children tested having blood lead levels greater than 5 µg/dL, Craven County compares favorably to the rest of North Carolina, which averages 0.34% of children tested having blood lead levels greater than 5 µg/dL.

The revised Federal Lead-Based Paint Regulations published on September 15, 1999 (24 CFR Part 35) have had a significant impact on many activities – rehabilitation, tenant based rental assistance, and property acquisition – supported by the CDBG program. The City of New Bern will comply with Title 24, Part 35: Lead-Based Paint Poisoning Prevention in Certain Residential Structures (Current Rule).

The City of New Bern reviewed the Blood Lead Level Screening Plan provided through the North Carolina Department of Health and Human Services – North Carolina Childhood Lead Poisoning Prevention Program (CLPPP). Additionally, the City reviewed the Blood Lead Level testing data provided through the Center for Disease Control and Prevention – Childhood Lead Poisoning Prevention Program.

The City of New Bern will ensure that the following will be done in conjunction with its Housing Rehabilitation activities:

- Applicants for rehabilitation funding receive the required lead-based paint information and understand their responsibilities.
- Staff properly determines whether proposed projects are exempt from some or all lead-based paint requirements.
- The level of federal rehabilitation assistance is properly calculated and the applicable lead-based paint requirements determined.
- Properly qualified personnel perform risk management, paint testing, lead hazard reduction, and clearance services when required.
- Required lead hazard reduction work and protective measures are incorporated into project rehabilitation specifications.

- Risk assessment, paint testing, lead hazard reduction, and clearance work are performed in accordance with the applicable standards established in 24 CFR Part 35.
- Required notices regarding lead-based paint evaluation, presumption, and hazard reduction are provided to occupants and documented.
- Program documents establish the rental property owner's responsibility to perform and document ongoing lead-based paint maintenance activities, when applicable.
- Program staff monitors owner compliance with ongoing lead-based paint maintenance activities, when applicable.

In addition, in conjunction with its Housing Rehabilitation activities, the City will ensure that:

- Applicants for rehabilitation funding receive the required lead-based paint information and understand their responsibilities.
- Staff properly determines whether proposed projects are exempt from some or all lead-based paint safety requirements.
- The level of federal rehabilitation assistance is properly calculated and the applicable lead-based paint requirements determined.

Actions planned to reduce the number of poverty-level families

According to the 2018-2022 American Community Survey, 16.5% of all people in the City of New Bern have incomes below the poverty level. Additionally, 47.4% of female headed households with children with no husband present live in poverty, which rises to 95.3% when the children are under 5 years old. Individuals living on the threshold of poverty were faced with a collection of obstacles that prevent them from escaping their situation. Some may need adequate affordable housing, job skills training, day care for children, treatment for medical or substance abuse issues or they may be children and adults with educational needs.

The City allocates its Community Development Block Grant program to improve the living environments of low to moderate-income persons, specifically improving the lives of low- to moderate-income youth in order to break the cycle of poverty.

Actions planned to develop institutional structure

The City of New Bern works with the following agencies to enhance coordination:

- **City of New Bern - Development Services** - oversees the CDBG program.
- **Housing Authority of the City of New Bern** - oversees the improvements to public housing communities.

- **Twin Rivers Opportunities, Inc.** - oversees the Section 8 Housing Choice Voucher Program and the development of scattered site affordable housing.
- **Social Services Agencies** - the City provides funds to address the needs of low- and moderate-income persons.
- **Housing Providers** - the City provides funds to rehabilitate and develop affordable housing for low- and moderate-income families and individuals.
- **North Carolina Balance of State CoC** - oversees the Continuum of Care Network for 79 counties including Craven County. For planning purposes, the CoC is divided into thirteen (13) regions. Craven County is located in Region 13, which is managed by the Housing Alliance of Coastal Carolina (HACC).

As part of the CDBG application planning process, local agencies, and organization are invited to submit proposals for CDBG funds for eligible activities.

The Development Services Department continues to look for gaps in the institutional structure. Maintaining and enhancing communication amongst all community and economic development stakeholders is essential in addressing the needs identified in the City of New Bern's Five-Year Consolidated Plan.

Actions planned to enhance coordination between public and private housing and social service agencies

Public Institutions: The City will act as a clearinghouse and facilitator for many of the activities described in the annual action plan. As the local unit of government, the City is empowered to apply for and administer certain types of grants. Support from the City, expressed as a certification of consistency or some other instrument, may be all that is required for some activities. Other activities will involve the more direct participation of the City for funding, acquisition of land or buildings, or in convening meetings of various agencies to iron out differences or strategies on how to seize opportunities. The City will continue to administer the CDBG program.

The Housing Authority of the City of New Bern administers public housing. This Authority is responsible for the management and maintenance of public housing units. The Housing Authority will continue in its efforts to modernize these public housing units in order to provide decent, affordable housing in the City. Twin Rivers Opportunities, Inc. administers Section 8 Rental Assistance Programs in the City.

Non-Profit Organizations: Non-profit housing agencies play a role in the implementation of this plan. Through the construction of new housing and the rehabilitation of existing units, these agencies access financing sources such as the Low Income Housing Tax Credit, Greenleaf Funding, and charitable contributions that increase the supply of affordable housing. While some groups focus on the rehabilitation of single units for resale to first time homebuyers, others have attempted to create assisted rental developments. In the future, the union of such groups with social service agencies that serve

specific special needs populations will address the Five Year Consolidated Plan strategy for creation of supportive housing and affordable housing opportunities.

Non-profit educational institutions provide an important partnership for the City. Craven Community College partnered with the City of New Bern on the construction of the VOLT Center. Craven Community College now provides job and vocational training at the center, which is located in the Greater Five Points Redevelopment Area. Many stakeholders spoken to during the interview process speak highly of the VOLT Center and its successes in training residents to succeed in the local workforce.

Social service agencies are a link between the provision of housing and the population it is intended to serve. The agencies work directly with providers of services to persons with special needs including: mental health, mental retardation, elderly, drug and alcohol addiction and families that are at-risk of becoming homeless. Although these agencies cannot provide housing, they can direct housing efforts where needed and are integral in the planning of housing and services for target populations. Emergency shelters, including the Religious Community Services and Coastal Women's Shelter, will continue to provide shelter for the homeless.

Private Industry: Several lending institutions cooperate with the City to provide funding for downtown improvements. Those lending institutions play an important role by providing financing that would not otherwise be available.

Discussion:

Monitoring:

The Monitoring Plan represents the City of New Bern's strategy for overseeing the activities of entities that carry out CDBG assisted activities. The Monitoring Plan identifies the following:

- The organizations to be monitored
- The issues to be explored and the methodology to be utilized in conducting the monitoring
- Identification of the specific Development Services staff members that will assume responsibility for monitoring
- The follow-up measures to be followed in communicating the results of the monitoring to affected organizations and the methods that will be utilized to obtain feedback from affected organizations

The CDBG monitoring will be carried out at two (2) separate levels. First, the City will conduct an internal monitoring to review the homeowner rehab program and to ensure that the CDBG Program is being administered in accordance with CDBG and other federal regulatory and statutory requirements. Second, the City will conduct an external monitoring to review the activities of its sub-recipients.

The purpose of the City's monitoring efforts is:

- to identify and correct issues that prevent the City from achieving full compliance with the regulatory requirements of the CDBG Program and other Federal requirements before deficiencies lead to HUD monitoring findings, and
- to learn more about the strengths and weaknesses of the various organizations that plays a role in the City's CDBG program and to use this knowledge as the basis for structuring future CDBG activities.

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Program Specific Requirements

AP-90 Program Specific Requirements – 91.220(l)(1,2,4)

Introduction:

The City of New Bern receives an annual allocation of CDBG funds. Since the City receives this federal allocation, the questions below have been completed, as they are applicable.

Community Development Block Grant Program (CDBG) Reference 24 CFR 91.220(l)(1)

Projects planned with all CDBG funds expected to be available during the year are identified in the Projects Table. The following identifies program income that is available for use that is included in projects to be carried out.

1. The total amount of program income that will have been received before the start of the next program year and that has not yet been reprogrammed	\$0.00
2. The amount of proceeds from section 108 loan guarantees that will be used during the year to address the priority needs and specific objectives identified in the grantee's strategic plan	\$0.00
3. The amount of surplus funds from urban renewal settlements	\$0.00
4. The amount of any grant funds returned to the line of credit for which the planned use has not been included in a prior statement or plan.	\$0.00
5. The amount of income from float-funded activities	\$0.00
Total Program Income	\$0.00

Other CDBG Requirements

1. The amount of urgent need activities	\$0.00
2. The estimated percentage of CDBG funds that will be used for activities that benefit persons of low and moderate income. Overall Benefit - A consecutive period of one, two or three years may be used to determine that a minimum overall benefit of 70% of CDBG funds is used to benefit persons of low and moderate income. Specify the years covered that include this Annual Action Plan.	77.72%

CDBG Percentages:

- **Administrative Percentage:** 20.0%
- **Public Service Percentage:** 0.0%
- **Low and Moderate-Income Percentage:** 77.72%
- **Slum and Blight Activities:** 22.28%



NEW BERN

CITY OF NEW BERN

2024

**ANALYSIS OF IMPEDIMENTS
TO FAIR HOUSING CHOICE**

**COMMUNITY DEVELOPMENT
BLOCK GRANT PROGRAM
(CDBG)**



Honorable Jeffrey T. Odham, Mayor

Foster Hughes, City Manager

Jessica Rhue, Director of Development Services

300 Pollock St. New Bern, NC 28560 | (252) 636-4000

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Executive Summary

The City of New Bern, North Carolina is an entitlement community under the U.S. Department of Housing and Urban Development's (HUD) Community Development Block Grant Program (CDBG). In accordance with the Housing and Community Development Act of 1974, as amended, each entitlement community must "affirmatively further fair housing." To demonstrate that an entitlement community is "affirmatively furthering fair housing," it must prepare an Analysis of Impediments to Fair Housing Choice which identifies any impediments



to fair housing choice and what steps it will take to affirmatively further fair housing. HUD advises communities that the Analysis of Impediments to Fair Housing should also address "Visitability," Section 504 of the Rehabilitation Act, the Americans with Disabilities Act, as well as the Fair Housing Act.

The Analysis of Impediments (AI) to Fair Housing Choice must now coincide with the City's Five Year Consolidated Plan, and then every five (5) years thereafter. As part of its Annual Action Plan, the City must additionally sign certifications every year stating that the City will affirmatively further fair housing. This means that the City will take appropriate actions to overcome the effects of any impediments identified through the AI, and maintain records reflecting the analysis and actions that are needed.

The City of New Bern did not previously prepare an Update to the Analysis of Impediments to Fair Housing Choice in 2019. The City has prepared this 2024 Analysis of Impediments to Fair Housing Choice to bring the City into sequence with its FY 2024-2028 Five Year Consolidated Plan. This analysis focuses on the status and interaction of six (6) fundamental conditions within the City of New Bern:

- The sale or rental of dwellings (public or private);
- The provision of housing brokerage services;
- The provision of financial assistance for dwellings;
- Public policies and actions affecting the approval of sites and other building requirements used in the approval process for the construction of publicly assisted housing;
- The administrative policies concerning community development and housing activities, which affect opportunities of minority households to select housing inside or outside areas of minority concentration; and
- Where there is a determination of unlawful segregation or other housing discrimination by a court or a finding of noncompliance by HUD regarding assisted housing in a recipient's jurisdiction, an analysis of the actions which could be taken by the recipient to remedy the discriminatory condition, including actions involving the expenditure of funds made available under 24 CFR Part 570.

The Fair Housing Act was originally passed in 1968 to protect buyers and renters from discrimination from sellers and landlords by making it unlawful to discriminate in the sale or rental of a property to persons included under the category of a protected class. The Fair Housing Act prohibits discrimination against persons based on their:

- **Race;**
- **Color;**
- **Sex/Gender;**
- **Disability;**
- **Religion;**
- **Ethnicity;**
- **National Origin/Ancestry;** and/or
- **Familial Status,** in the sale, rental, and financing of housing.

The methodology employed to undertake this Analysis of Impediments included:

- **Research**
 - A review was performed of the City's previous program years, the City's Zoning Ordinance, the City's Comprehensive Plan, as well as a review of the FY 2019-2023 Five Year Consolidated Plan, FY 2019 through FY 2023 Annual Action Plans, and the Consolidated Annual Performance and Evaluation Reports for FY 2019 through FY 2023.
 - A review of the New Bern Housing Authority's Annual Plans.
 - The most recent demographic data for the City was analyzed from the U.S. Census, which included general, demographic, housing, economic, social, and disability characteristics.
 - A review of the U.S. Department of Housing and Urban Development Comprehensive Housing Affordability Strategy (HUD-CHAS) data was undertaken.
 - A review of financial institutions mortgage lending policies through the Home Mortgage Disclosure Act (HMDA) database was completed.
 - A review of the real estate and mortgage practices in general, was undertaken.
 - Home mortgage foreclosure data was also reviewed.
- **Interviews & Meetings**
 - Meetings and/or interviews were conducted with the New Bern Housing Authority; Legal Aid of North Carolina; Twin Rivers Opportunities, Inc., community and social service agencies; advocacy organizations for the disabled; housing providers; etc.
 - Surveys were sent to each housing provider, social service, and community development agency that was invited to roundtable discussions. Follow up phone calls were made when an organization neither returned a survey nor attended a meeting.

- **Analysis of Data**
 - Low- and moderate-income areas were identified and mapped.
 - Concentrations of minority populations were identified and mapped.
 - Concentrations of owner-occupied and renter-occupied housing units were identified and mapped.
 - Fair housing awareness in the community was evaluated.
 - The location of Housing Cost Burdens throughout the City was analyzed.
 - The location of CDBG expenditures throughout the City was analyzed.
 - The location of HOME expenditures throughout the City was analyzed.
 - The City's Five Year Goals and Objectives were reviewed and updated.

- **Potential Impediments**
 - Public sector policies that may be viewed as impediments were analyzed.
 - Private sector policies that may be viewed as impediments were analyzed.

- **Citizen Participation**
 - Electronic copies of a fair housing survey were made available on the City's website, public meetings were held, and copies were placed on public display to encourage citizen input.
 - The City held one (1) community meeting in City Hall:
 - ***Needs Assessment Meeting - First Public Hearing***
February 25, 2024 at 6:00 PM
300 Pollock St,
New Bern, NC 28560
 - Flyers were passed out in the communities, postings were placed on community message boards, and flyers were handed out to agencies at the social service, community development, and housing provider meetings.
 - The 2024 Analysis of Impediments to Fair Housing Choice was made available on the City's website beginning on Friday, June 14, 2024.
 - The City of New Bern held a Public Hearing for the "draft" 2024 Analysis of Impediments on Tuesday, June 25, 2024 at 6:00 PM.

Since the City of New Bern did not prepare an Analysis of Impediments to Fair Housing Choice with its previous Five Year Consolidated Plan, the City cannot report on the status on any impediments.

I. Introduction

The City of New Bern is a Federal entitlement community under the U.S. Department of Housing and Urban Development's (HUD's) Community Development Block Grant Program (CDBG). In accordance with the Housing and Community Development Act of 1974, as amended, each entitlement community must "affirmatively further fair housing." The community must conduct an Analysis of Impediments to Fair Housing Choice to identify any potential impediments to fair housing choice and what steps it will take to affirmatively further fair housing. All Federal entitlement communities must prepare an Analysis of Impediments to Fair Housing Choice to coincide with their latest Five Year Consolidated Plan, and then every five (5) years thereafter.

HUD defines "fair housing choice" as:

"The ability of persons, regardless of race, color, religion, sex, national origin, familial status, or handicap, of similar income levels to have available to them the same housing choices."

This Housing Analysis consists of the following six (6) conditions:

- The sale or rental of dwellings (public or private);
- The provision of housing brokerage services;
- The provision of financial assistance for dwellings;
- Public policies and actions affecting the approval of sites and other building requirements used in the approval process for the construction of publicly assisted housing;
- The administrative policies concerning community development and housing activities, which affect opportunities of minority households to select housing inside or outside areas of minority concentration; and
- Where there is a determination of unlawful segregation or other housing discrimination by a court or a finding of noncompliance by HUD regarding assisted housing in a recipient's jurisdiction, an analysis of the actions which could be taken by the recipient to remedy the discriminatory condition, including actions involving the expenditure of funds made available under 24 CFR Part 570.

HUD-FHEO suggests that communities conducting an Analysis of Impediments to Fair Housing Choice consider the policies surrounding "visitability," the Section 504 for the Rehabilitation Act, the Americans with Disabilities Act, and the Fair Housing Act. Housing that is "visitable" has the most basic level of accessibility that enables persons with disabilities to visit the home of a friend, family member, or neighbor.

- "Visitable" housing has at least one accessible means of ingress/egress, and all interior and bathroom doorways have as a minimum a 32-inch clear opening.
- Section 504 of the Rehabilitation Act (24 CFR Part 8), known simply as "Section 504," prohibits discrimination against persons with disabilities in any program receiving Federal financial assistance.

- The Americans with Disabilities Act (42 U.S.C. 12131; 47 U.S.C. 155, 201, 218, and 225) (ADA) prohibits discrimination against persons with disabilities in all programs and activities sponsored by state and local governments.
- The Fair Housing Act requires property owners to make reasonable modifications to their rental units and/or public areas in order to allow a disabled tenant to have full use of the unit. Additionally, property owners are required to make reasonable accommodations to rules or procedures to afford a disabled tenant full use of the unit.

In regard to local zoning ordinances, the Fair Housing Act prohibits local government from making zoning or land use decisions, or implementing land use policies that exclude or discriminate against persons of a protected class.

This is the first year that the City of New Bern has prepared an Analysis of Impediments to Fair Housing Choice. This Analysis of Impediments will bring the City into sequence with its FY 2024-2028 Five Year Consolidated Plan. The document is designed to act as a planning tool, providing the City of New Bern with the necessary framework to strategically reduce any potential or identified impediments to fair housing choice over the next five (5) years, and continue to make modifications based on events and activities in the community during that time period.

In order to affirmatively further fair housing in the City of New Bern, the City must look beyond its boundaries and coordinate fair housing with Craven County and the surrounding region. Fair housing choice is the goal of the AI and the opportunity should be made available to low-income residents and the members of the protected classes who may want to live anywhere in Craven County and the surrounding eastern coastal region of North Carolina.

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II. Background Data

The demographic, housing, economic, and social characteristics of the City of New Bern were evaluated as a basis for determining and identifying any potential impediments to fair housing choice.

Demographic information on the City of New Bern is sourced from the American Community Survey Five-Year Estimates for the years 2013-2017 and 2018-2022. This Census data, along with data from the 2020 U.S. Census and other databases such as the CHAS Data, have been used to evaluate the City of New Bern’s demographic and socio-economic characteristics, as well as other conditions affecting fair housing choice.



Part VII, Appendix A of this report contains extensive demographic data that is summarized and/or illustrated in the following sections.

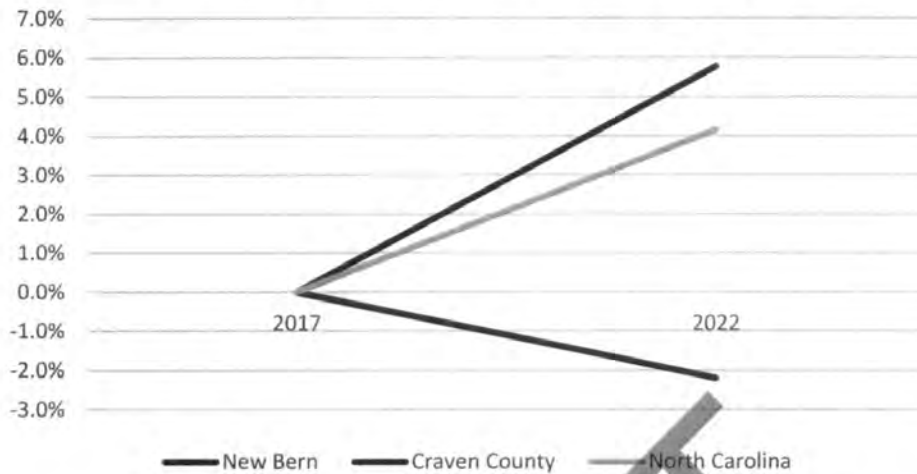
A. Population, Race, Ethnicity, and Religion

Population:

According to the 2013-2017 and 2018-2022 American Community Surveys, New Bern’s population increased from 29,664 people in 2017 to 31,373 people in 2022 (a 5.8% increase). Population across Craven County decreased, but population within the State of North Carolina itself increased during the period of 2017 to 2022. Below is a chart showing population numbers, and a graph demonstrating percent change in the three geographic entities.

	New Bern	Craven County	North Carolina
2017	29,664	103,374	10,052,564
2022	31,373	101,098	10,470,214

Percent Population Change from 2017-2022



Source: 2013-2017 ACS and 2018-2022 ACS

Race:

The following table highlights the racial composition of New Bern at the time of the 2018 and 2022 American Community Surveys.

Race and Hispanic or Latino Population in New Bern

Race and Hispanic or Latino	2013-2017 ACS		2018-2022 ACS	
	#	%	#	%
Total	29,664	100%	31,373	100%
White alone	16,792	56.6%	17,571	56.0%
Black or African American alone	9,391	31.7%	9,653	30.8%
American Indian and Alaska Native alone	156	0.5%	173	0.6%
Asian alone	1,928	6.5%	1,599	5.1%
Native Hawaiian and Other Pacific Islander alone	15	0.1%	0	0.0%

Some Other Race alone	680	2.3%	855	2.7%
Two or More Races	702	2.4%	1,522	4.9%
Hispanic or Latino	1,979	6.7%	2,001	6.4%

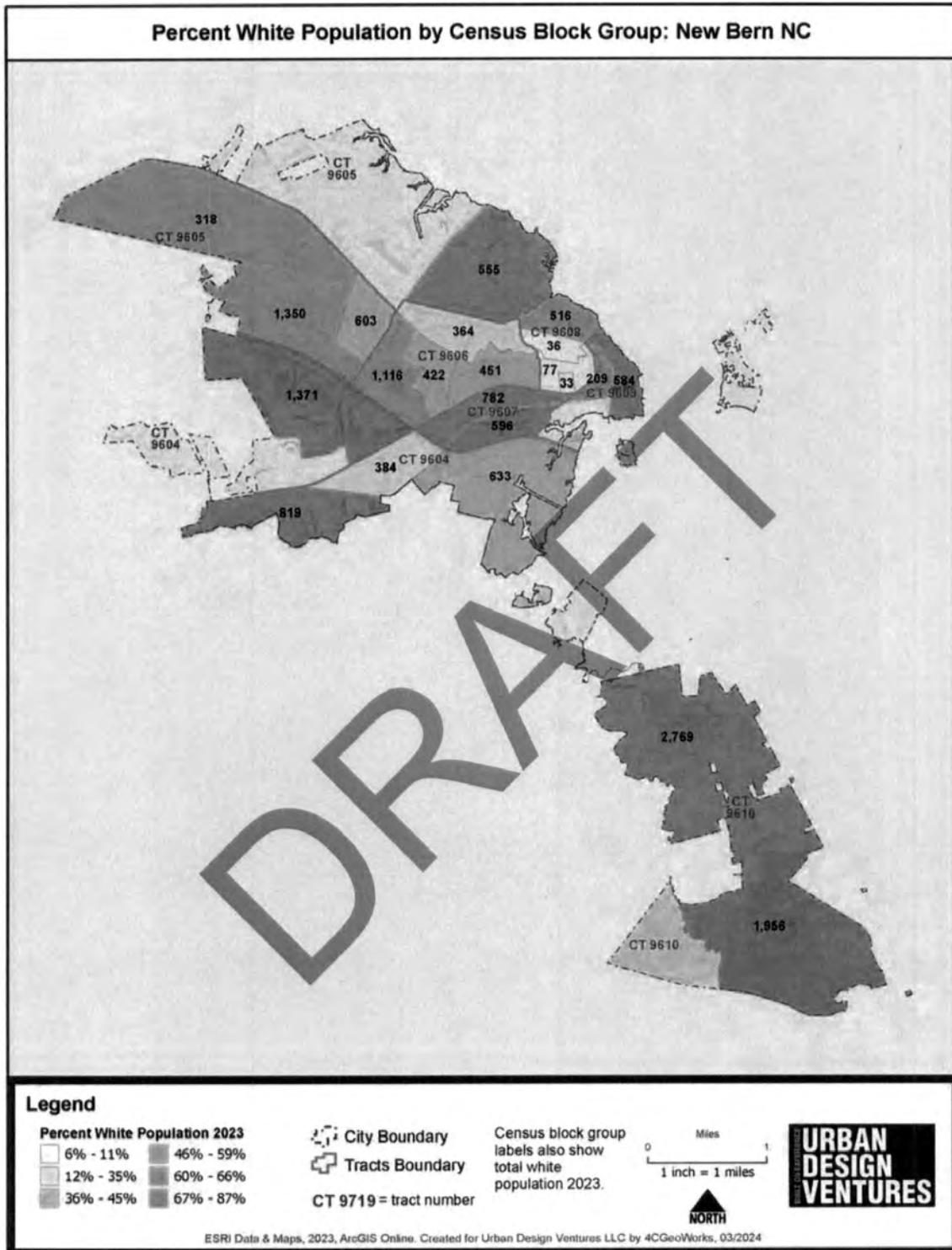
Source: 2013-2017 and 2018-2022 ACS

The most common race identified in New Bern in 2022 was White alone with 17,571 residents comprising 56% percent of the population. The second most common race identified in New Bern in 2022 was Black or African American alone with 9,653 residents comprising 30.8% percent of the population.

There did not appear to be any change in proportional representation in New Bern from 2017 to 2022, larger than 5.0 percentage points.

It is interesting to note that while the White alone population increased by 779 persons, its percentage of the total city population dropped from 56.6% to 50.0%. This pattern for the Black or African American alone population increased by 262 persons, its percentage of the total city population decreased from 31.7% to 30.8%. There was a loss of 329 in the Asian alone population and a loss of 15 Native Hawaiian and Other Pacific Islander alone. The largest gain was in the category of Two or More Races which more than doubled in population from 702 to 1,522 or an increase of 802 persons.

The following maps highlight the racial composition by census tract across the City according to the 2018-2022 American Community Survey. The darkest shaded block groups indicate the highest concentration of each population group, and the lightest shaded block groups indicate the lowest concentration of each population group.



The minority population is mainly located in Wards 1, 2, 4, and 5, in the neighborhoods west of the downtown, railroad tracks, north of US Highway 17/70, and between US 17/70 and Trent Woods.



Observations: People who identify as Black or African-American are the most common minority group in the City, followed by Hispanic or Latino and Asian, which is relevant to fair housing complaints on the bases of Race or Color. People who identify themselves as Black or African-American can experience housing discrimination throughout the City. No neighborhoods are majority Asian or majority Hispanic or Latino, but these populations can also experience discrimination throughout the City.

Ethnicity:

The following table highlights the ethnicities of New Bern residents at the time of the 2017 and 2022 American Community Surveys.

Ethnicity and Ancestry in New Bern

ANCESTRY	2013-2017 ACS		2018-2022 ACS	
	#	%	#	%
Total population	29,664	100%	31,373	100%
American	1,215	4.1%	2,451	7.8%
Arab:	120	0.4%	158	0.5%
Czech	56	0.2%	146	0.5%
Danish	45	0.2%	22	0.5%
Dutch	448	1.5%	156	0.5%
English	2,915	9.8%	4,098	13.1%
French (except Basque)	588	2.0%	773	2.5%
French Canadian	73	0.2%	248	0.8%
German	2,915	9.8%	3,139	10.0%
Greek	41	0.1%	22	0.1%
Hungarian	36	0.1%	188	0.6%
Irish	2,971	10.0%	2,658	8.5%
Italian	700	2.4%	667	2.1%
Lithuanian	17	0.1%	54	0.2%
Norwegian	68	0.2%	103	0.3%

Polish	388	1.3%	603	1.9%
Portuguese	40	0.1%	3	0.0%
Russian	193	0.7%	27	0.1%
Scotch-Irish	562	1.9%	391	1.2%
Scottish	957	3.2%	681	2.2%
Slovak	35	0.1%	68	0.2%
Subsaharan African:	624	2.1%	276	0.9%
Swedish	282	1.0%	140	0.4%
Swiss	79	0.3%	133	0.4%
Ukrainian	45	0.2%	70	0.2%
Welsh	64	0.2%	114	0.4%
West Indian (except Hispanic groups):	125	0.4%	117	0.4%
Other groups	14,001	47.2%	13,867	44.2%

Source: 2013-2017 and 2022-2028 ACS

The most common ancestral group identified in New Bern in 2017 was Irish with 2,971 residents comprising 10.0 percent of the population. The second most common ancestral groups identified in New Bern in 2017 was German and English, each with 2,915 residents comprising of 9.8 percent of the population.

When comparison is made in 2022, the most common ancestral group identified in New Bern was English with 4,098 residents comprising 13.1 percent of the population. The second most common ancestral group identified in New Bern in 2022 was German with 3,139 residents comprising 10.0 percent of the population.

It is important to note that “Other Groups” make up the largest ancestral group throughout the City. These Other Groups include people with multiple ancestries, including African American and Hispanic populations. There was not any change in proportional representation in New Bern from 2012 to 2017 that was larger than 5.0 percentage points.

Observations: National Origin or Ancestry are possible bases for fair housing complaints, as are Citizenship or Immigration Status and Preferred Language. It is possible for residents of the City to experience discrimination based on their National Origin or Ancestry, particularly if their ancestry group is small, and their language spoken at home is something other than English.

Changes in the Foreign-Born Population:

The immigrant and refugee population has been increasing in the City of New Bern and in Craven County from 2017 to 2022. The overall foreign-born population in the City has increased from 1,691 according to the 2013-2017 ACS, to 2,329 according to the 2018-2022 ACS, which is a 37.7% increase. The fastest-growing group of foreign-born populations is individuals from Asia.

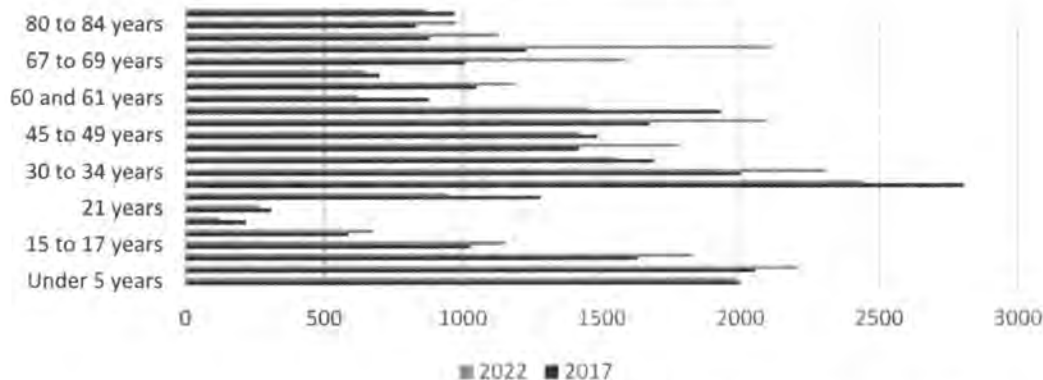
The City of New Bern’s foreign-born population from Asia has increased from 673 according to the 2013-2017 ACS to 1,399 according to the 2018-2022 ACS, which is a 107.9% increase. This is likely due to an increase in the City’s refugee population, many of whom are from Myanmar. Interviews about the needs of immigrant communities were conducted with Interfaith Refugee Ministry, Inc., the primary organization that serves immigrants and refugees in the City.

Observations: Foreign-born populations can experience housing discrimination based on their Race, Color, Religion, Ethnicity, National Origin, or Ancestry, depending on their background. Conversations with leaders of the City’s foreign-born population have highlighted the language barrier as a major obstacle for the attainment of affordable housing for these populations, and discrimination against non-English speakers could potentially play a role in this challenge. Discrimination against these groups has the potential to take place throughout the City, but is more likely in or near neighborhoods where these groups are concentrated.

Age:

The following chart illustrates age distribution in New Bern at the time of the 2013-2017 ACS and 2018-2022 ACS. The Census shows that currently, children under 18 years of age represent 22.9 percent of the population; The median age is 38.5 years of age.

Change of Age Over Time

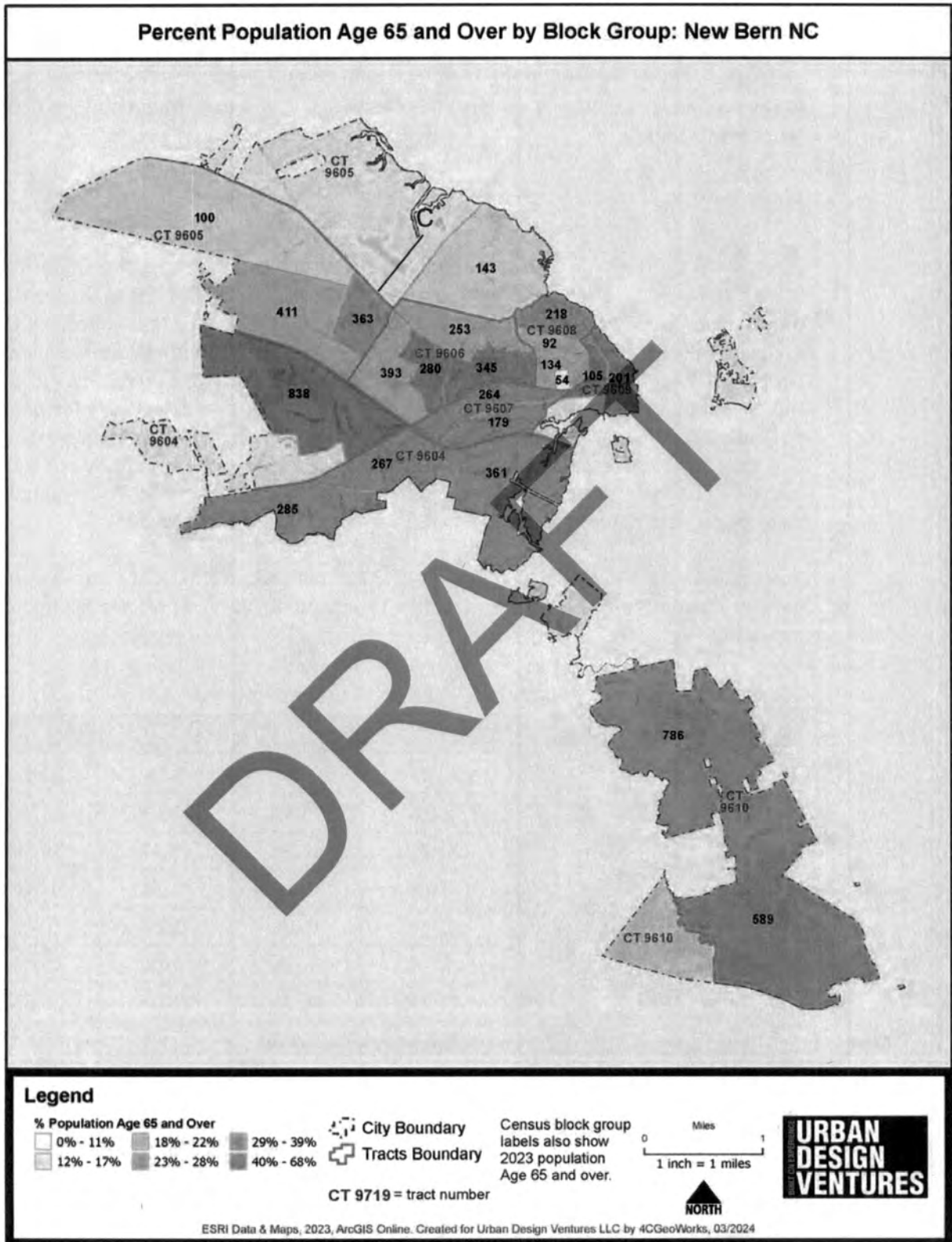


Source: 2013-2017 ACS and 2018-2022 ACS

The median age in the City of New Bern at the time of the 2013-2017 ACS estimates was 37.1 years of age, and this increased to 40.4 years of age at the time of the 2018-2022 ACS. During this same time period, the median age in Craven County increased from 36.2 to 38.5 years, and the median age for the State of North Carolina increased from 38.4 to 39.1 years.

The following map illustrates the percentage of the population in the City of New Bern that is over the age of 65. Overall, 23.4% of the City population belongs to the age 65 and over cohort. The elderly seem to be dispersed throughout the middle and southern portions of the City, with a particularly high concentration of persons age 65 and over in Ward 6 situated west of the intersection of US 17/70 and Dr. Martin Luther King Junior Boulevard.

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Observations: Older individuals are more likely to be disabled, and experience housing discrimination in the form of landlords refusing to make reasonable modifications or accommodations. Though this is not the only form of discrimination that older residents experience, these are among the most common complaints in the City and nationally. Areas with a high number of seniors and older housing stock are frequently the sites of these complaints.

Religion:

The U.S. Census does not collect data on the religious affiliations of the population in the United States. In an effort to better understand the religious affiliations of the residents of New Bern, the City used the data made available by The Association of Religion Data Archives (ARDA). ARDA surveys the congregation members, their children, and other people who regularly attend church services within counties across the country. Although this data appears to be the most comprehensive data that is available, it is unfortunately not entirely complete, as it does not accurately include Black Protestant denominations. The total number of regular attendees was adjusted in 2010 to represent the population including historic African American denominations. However, the total value cannot be disaggregated to determine the distribution across denominational groups.

The table below shows the distribution of residents of Craven County across various denominational groups, as a percentage of the population which reported affiliation with a church.

Religious Affiliation in Craven County

	1990	2000	2010	2020
Black Protestant	39.3%	*	9.1%	16.4%
Catholic	8.8%	13.5%	13.0%	18.9%
Evangelical Protestant	21.3%	45.2%	48.2%	38.3%
Islam	0.0%	0.4%	0.0%	1.7%
Judaism	0.0%	0.2%	0.3%	0.0%
Latter-day Saints	1.5%	2.4%	3.2%	2.2%
Mainline Protestant	29.1%	38.2%	26.0%	20.6%
Orthodox	0.0%	0.1%	0.0%	0.0
Other Christians	0.0%	0.1%	0.1%	0.4%
Other	0.0%	0.1%	0.1%	0.1%

Source: The Association of Religion Data

* Black Protestant Churches were not included in this year’s ARDA survey. This year was also a low outlier in overall participation.

Between 1990 and 2020, Craven County saw a slight overall increase in the number of people identifying with religious traditions. Of those that considered themselves religious, there was an increase in Evangelical Protestants and Catholics, and a decrease in Mainline Protestants and Black Protestants.

Observations: Religion is a protected class, and it is possible for residents of the City and the County to experience discrimination based on religion. A number of minority religions exist within the County, which are often more likely targets of discrimination.

B. Households

Household Tenure:

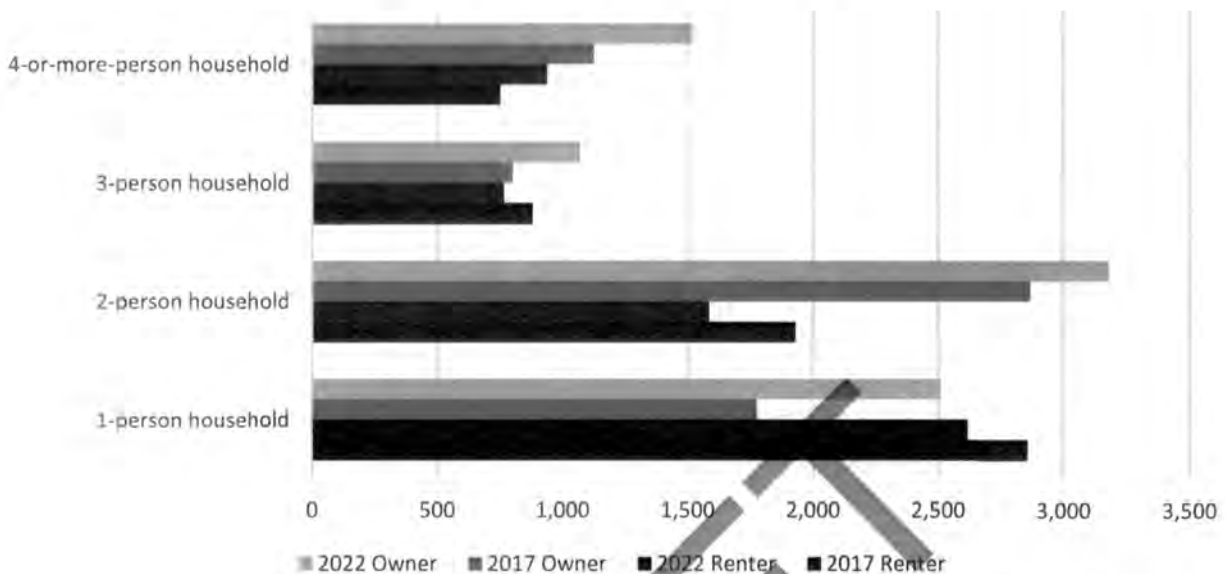
According to the 2013-2017 American Community Survey, there were 15,051 housing units in New Bern. Of these housing units, 12,982 (84.7%) were occupied and 2,069 (13.7%) were vacant. Of the occupied housing units, 6,567 (50.6%) were owner-occupied and 6,415 (49.4%) were renter-occupied.

In the 2018-2022 American Community Survey, the number of housing units increased to 16,265 in New Bern. Of these housing units, 14,182 (87.2%) were occupied and 2,083 (12.8 percent) were vacant. Of the occupied housing units, 8,279 (58.4%) were owner-occupied and 5,850 (41.6%) were renter-occupied.

Between the two survey periods, there was a 1,214 unit increase in the total number of housing units, a 1,200-unit increase (9.2% increase) in the number of occupied units, and a 14 unit increase in the number of vacant units. The number of owner-occupied units increased by 1,712 units (26.1% increase) and the number of renter-occupied units decreased by 565 units (8.8% decrease).

There was only a marginal increase of 16 vacant units from 2017 to 2022.

Size of Households in New Bern

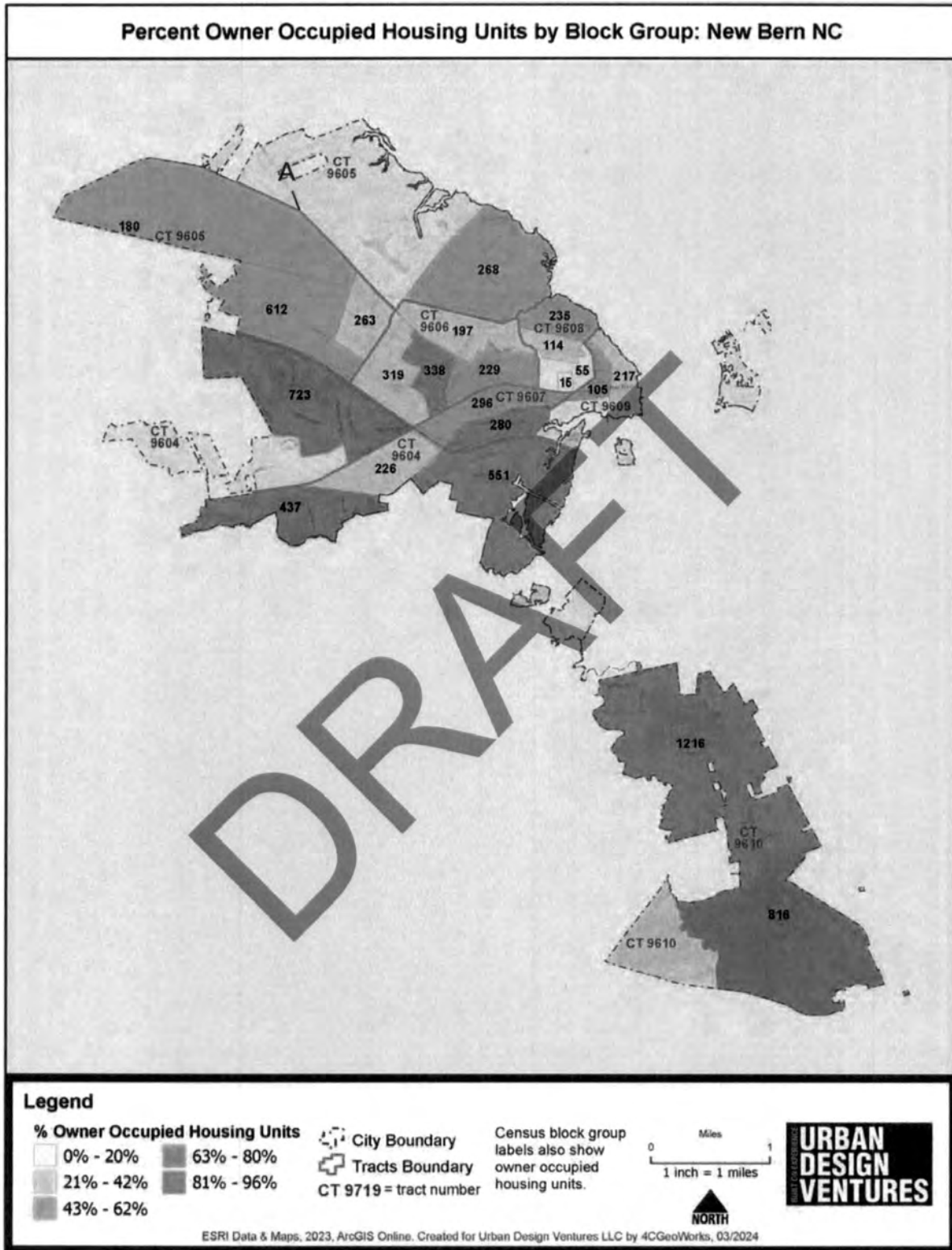


Source: 2013-2017 ACS and 2018-2022 ACS

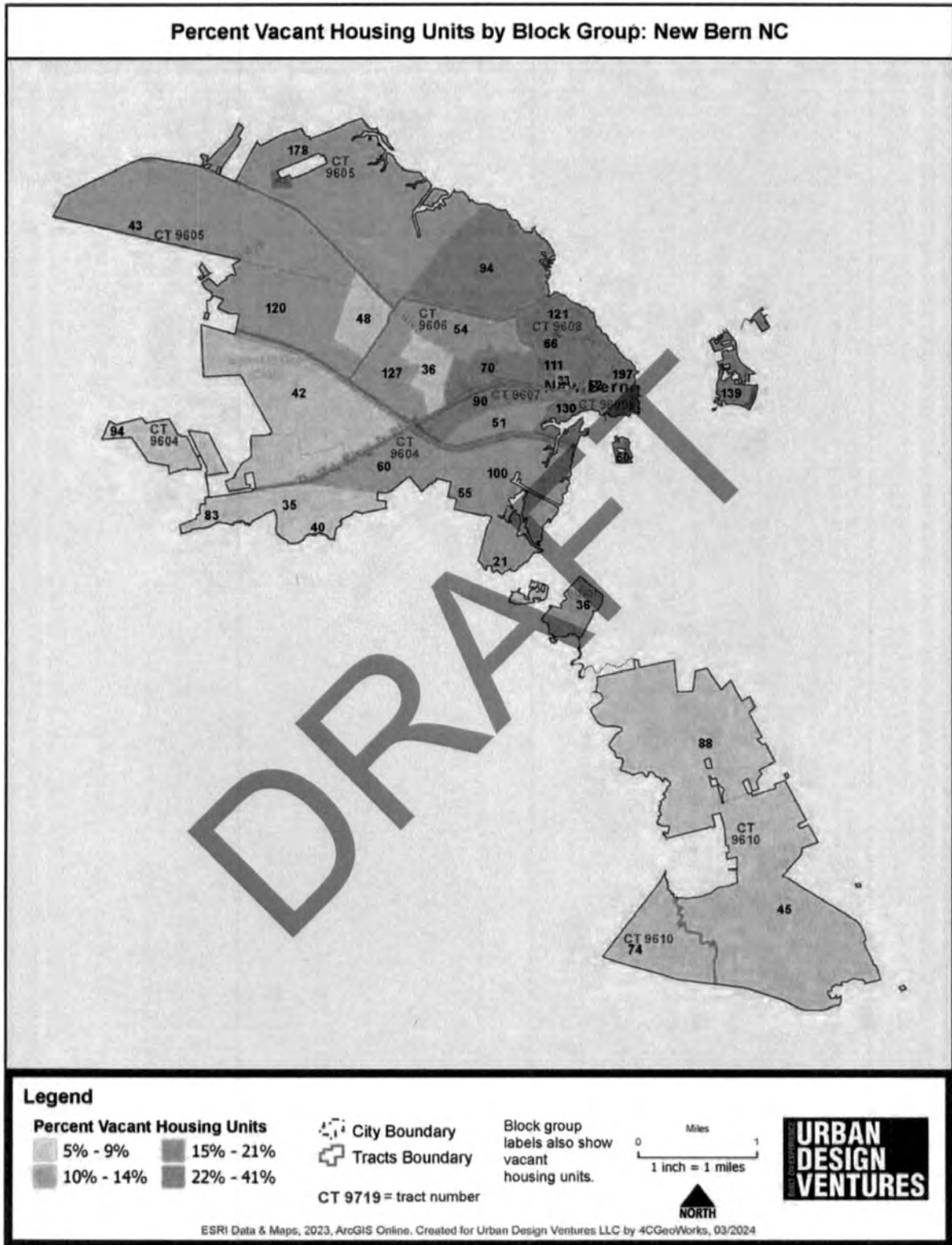
The two-person owner-occupied household is the most common household type, followed by one-person renter-occupied households. Households with 2 to 6 people tend to be owner-occupied rather than renter-occupied.

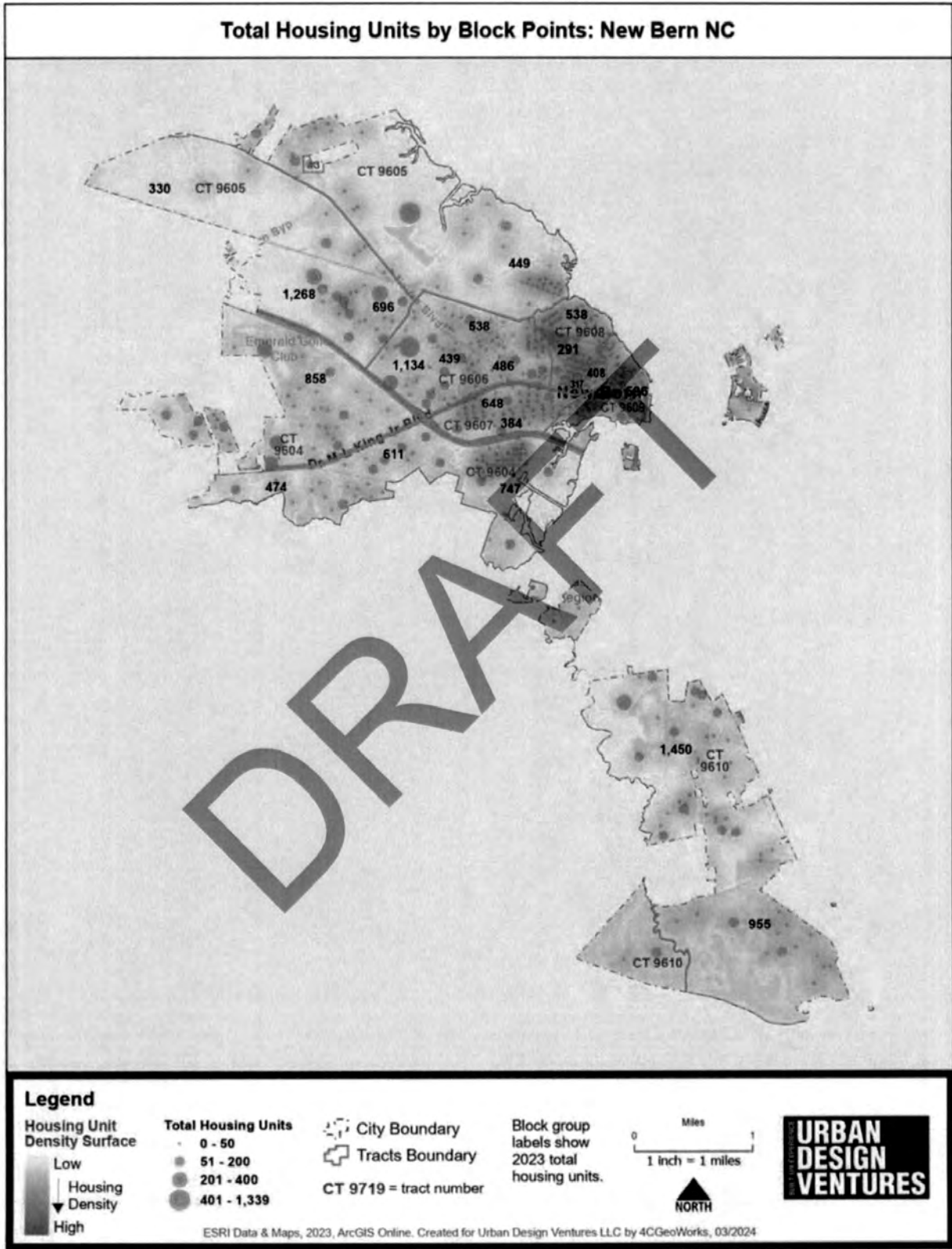
The following maps highlight the distribution of owner-occupied, renter-occupied housing units, and vacant housing units across the City:

- Owner-Occupied units are scattered across the City, with the highest concentrations in the western- and southern-most portions of Wards 1, 2, 3, and 6.
- The next map shows that the highest concentration of rental units lies in a wedge broadly between the railroad tracks to the northeast and Trent Boulevard to the south in Wards 1, 2, 4, and 5.
- As illustrated in the third map, vacant housing units are concentrated in Ward 1 (in and around Downtown New Bern). There are rather more vacancies in Wards 2, 4 and 5 northwest of Downtown than in Wards 3 and 6 to the south and west.
- The last map in this series illustrates the density of all housing units throughout the City. Unsurprisingly, Ward 1 in and around Downtown New Bern has the highest concentration of housing units, with moderate density in Ward 2 and decreasingly dense housing in the remaining Wards. Housing density in Ward 3 is particularly low; Ward 5 has some dense housing developments though overall its density is also low.









Observations: There are different forms of housing discrimination that renters and homebuyers can experience. Renters may be turned away by landlords based on their being a member of a protected class. Additionally, renters may also be turned away from a rental unit based on source of income, which effectively discriminates against Section 8 Housing Choice Voucher holders. Discrimination against those with disabilities is also important to note. Landlords may refuse to provide reasonable modifications or accommodations for disabled tenants. Homebuyers may be steered away from purchasing in majority-homeowner neighborhoods based on Race, Color, or National Origin.

Household Tenure by Race and Ethnicity:

The tables below compares homeowners and renters by race and ethnicity in New Bern.

Household Type by Race and Ethnicity in the City of New Bern

Cohort	2013-2017 ACS		2018-2022 ACS	
	#	%	#	%
Householder who is White alone	8,131	62.6%	8,645	61.0%
Householder who is Black or African American alone	4,043	31.1%	4,207	29.7%
Householder who is American Indian and Alaska Native alone	62	0.5%	41	0.3%
Householder who is Asian alone	406	3.1%	524	3.7%
Householder who is Native Hawaiian and Other Pacific Islander alone	0	0.0%	0	0.0%
Householder who is some other race alone	172	1.3%	280	2.0%
Householder who is two or more races	168	1.3%	485	3.4%
Householder who is Hispanic or Latino	717	5.5%	649	4.6%
Householder who is not Hispanic or Latino	12,265	94.5%	13,533	95.4%

Source: 2013-2017 ACS and 2018-2022 ACS

Household Tenure by Race and Ethnicity in the City of New Bern

Cohort	2013-2017 ACS				2018-2022 ACS			
	Owner	%	Renter	%	Owner	%	Renter	%
Householder who is White alone	4,902	74.6%	3,229	50.3%	5,595	67.6%	3,050	51.7%
Householder who is Black or African American alone	1,400	21.3%	2,643	41.2%	1,982	23.9%	2,225	37.7%
Householder who is American Indian and Alaska Native alone	22	0.3%	40	0.6%	18	0.2%	23	0.4%
Householder who is Asian alone	141	2.1%	265	4.1%	334	4.0%	190	3.2%
Householder who is Native Hawaiian and Other Pacific Islander alone	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Householder who is some other race alone	70	1.1%	102	1.6%	80	1.0%	200	3.4%
Householder who is two or more races	32	0.5%	136	2.1%	270	3.3%	215	3.6%
Householder who is Hispanic or Latino	276	4.2%	441	6.9%	226	2.7%	423	7.2%
Householder who is not Hispanic or Latino	6,291	95.8%	5,974	93.1%	8,053	97.3%	5,480	92.8%

Source: 2013-2017 ACS and 2018-2022 ACS

The percentage of homeownership has increased in the City. Homeowners represented 50.6% (6,567 households) of all households in 2017 and 58.4% (8,279 households) of all households in 2022. In response, rental units decreased in the City. In contrast, renters represented 49.4% (6,415 households) of all households in 2017 and 41.6% (5,903 households) of all households in 2022.

There were significant shifts in regard to housing tenure based on race and ethnicity for the City's Black population between 2017 and 2022, since there were 582 more Black owner-occupied households (a 41.2% increase). This is higher than the 14.1% increase in owner-occupied White households during the same period.

Of all homeowners in the City in 2022: 61.0% are White, which is a one percentage point decrease from 62.6% in 2017. African American homeownership increased more than two and one-half percentage points from 21.3% to 23.9% of total homeowners in the City, and African American renters decreased from 41.2% (2,643 households) to 37.7% (2,225 households) of renter households. The percentage of households in the City that are Hispanic or Latino decreased overall since 2017. The portion of Hispanic or Latino households decreased from 5.5% (717 households) in 2017 to 4.6% (649 households) in 2022. The percentage of Asian households in the City increased from 3.1% (406 households) in 2017 to 3.7% (524 households) in 2022. The majority of these increases were in owner-occupied housing, from 6,567 households in 2017 to 8,279 households in 2022.

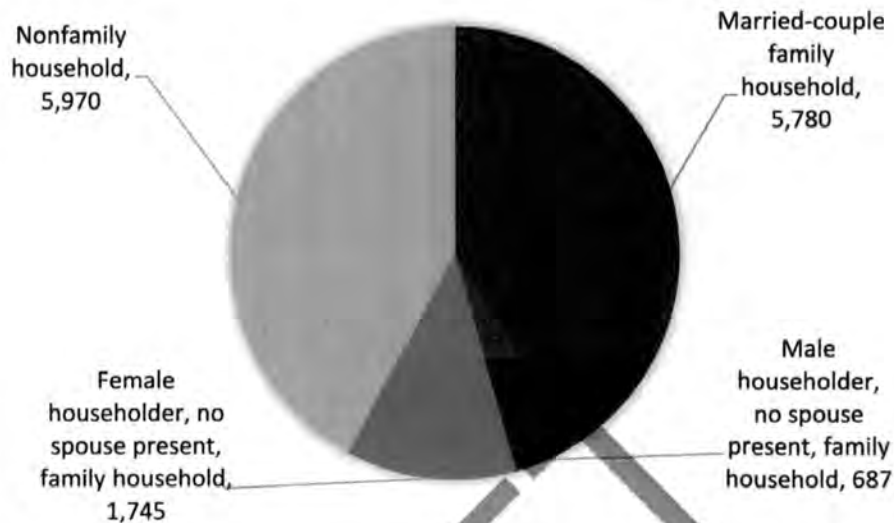
Observations: As New Bern's Black or African-American residents continue to make up a large portion of the city, it becomes imperative to ensure they are protected. Housing discrimination may disproportionately affect Black or African-American residents.

Families:

In 2017, there were a total of 12,982 households in New Bern. Non-family households comprised 41.6% (5,400 households) of all households. In 2022, there were a total of 14,182 households in New Bern. Non-family households comprised 42.1% (5,970 households) of all households. The total number of households in New Bern increased by 1,200 units from 2017 to 2022, whereas the total number of non-family households increased by 570 units (0.5 percentage point increase). A non-family household is defined as a householder living alone or with others not related by blood, marriage, or adoption.

In 2022, non-family households comprised 42.1% of all households, married-couple family households comprised 40.8% of all households, female householders with no husband present comprised 12.3% of all households, and male householders with no wife present comprised 4.8% of all households in the City. The chart below illustrates the breakdown of households by type in New Bern as of 2022 using data from the 2018-2022 ACS.

Family Type by Household in New Bern



Source: 2018-2022 ACS

Observations: Familial Status is a protected class, and single parent households, particularly those with a female head of household, are more likely to experience housing discrimination than married couple households.

C. Income and Poverty

Household Income:

The median household income in New Bern increased by 33.2% (\$13,866 increase) from \$41,807 in 2017 to \$55,673 in 2022.

The table below compares the distribution of household income according to the 2013-2017 American Community Survey and the 2018-2022 American Community Survey.

Household Income in New Bern

Items	2013-2017 ACS		2018-2022 ACS	
	Number of Households	Percentage	Number of Households	Percentage
Total Households	12,982	100%	14,182	100%
Less than \$10,000	1,285	9.9%	780	5.5%
\$10,000 to \$14,999	714	5.5%	312	2.2%
\$15,000 to \$24,999	1,766	13.6%	681	4.8%
\$25,000 to \$34,999	1,662	12.8%	1,248	8.8%
\$35,000 to \$49,999	2,077	16.0%	1,447	10.2%
\$50,000 to \$74,999	2,285	17.6%	2,383	16.8%
\$75,000 to \$99,999	987	7.6%	2,269	16.0%
\$100,000 to \$149,999	1,350	10.4%	2,950	20.8%
\$150,000 to \$199,999	571	4.4%	1,092	7.7%
\$200,000 or more	286	2.2%	1,021	7.2%
Median Household Income	\$41,807	(X)	\$55,673	(X)
Mean Household Income	\$57,902	(X)	\$77,980	(X)

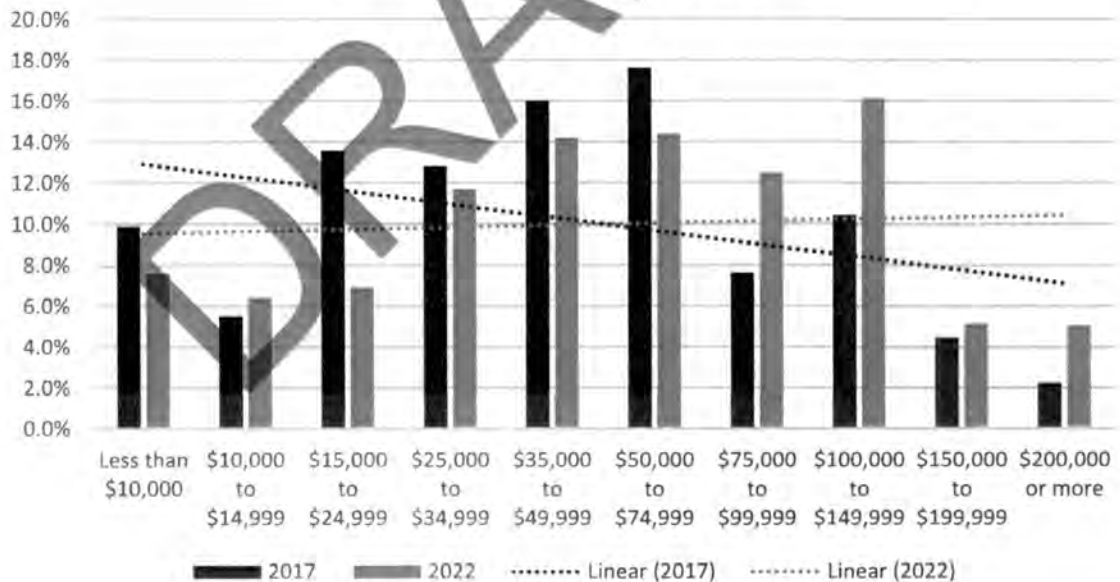
Source: 2013-2017 and 2018-2022 ACS

The U.S. Department of Housing and Urban Development (HUD) establishes income limits that determine eligibility for assisted housing programs including: Public Housing, Section 8 Project-Based, Section 8 Housing Choice Voucher, Section 202 housing for the elderly, and Section 811 housing for persons with disabilities programs. HUD issues income limits based on Median Family Income estimates and Fair Market Rent definitions for each metropolitan area, parts of some metropolitan areas, and each non-metropolitan county.

The following table illustrates an increase in household income throughout the City. More accurately, it depicts an increase in higher-income households and a decrease in most lower-income households. In fact, the percentage of New Bern households making up to \$74,999 per year decreased between 2017 and 2022 (with the exception of those earning \$10,000 to \$14,999 per year), while the percentage of households making \$75,000 or more, increased. This is indicative of a wealthier City, or at least one that is replacing its lower-income households with higher-income households. This continues a trend from the year 2000. This trend is illustrated in the table to the right, as well as the following chart; this chart shows lines illustrating that the City is becoming more wealthy, which can be explained by an increase in higher-income households and/or a decrease in lower-income households.

Income	2017	2022
Less than \$10,000	9.9%	7.6%
\$10,000 to \$14,999	5.5%	6.4%
\$15,000 to \$24,999	13.6%	6.9%
\$25,000 to \$34,999	12.8%	11.7%
\$35,000 to \$49,999	16.0%	14.2%
\$50,000 to \$74,999	17.6%	14.4%
\$75,000 to \$99,999	7.6%	12.5%
\$100,000 to \$149,999	10.4%	16.1%
\$150,000 to \$199,999	4.4%	5.1%
\$200,000 or more	2.2%	5.0%

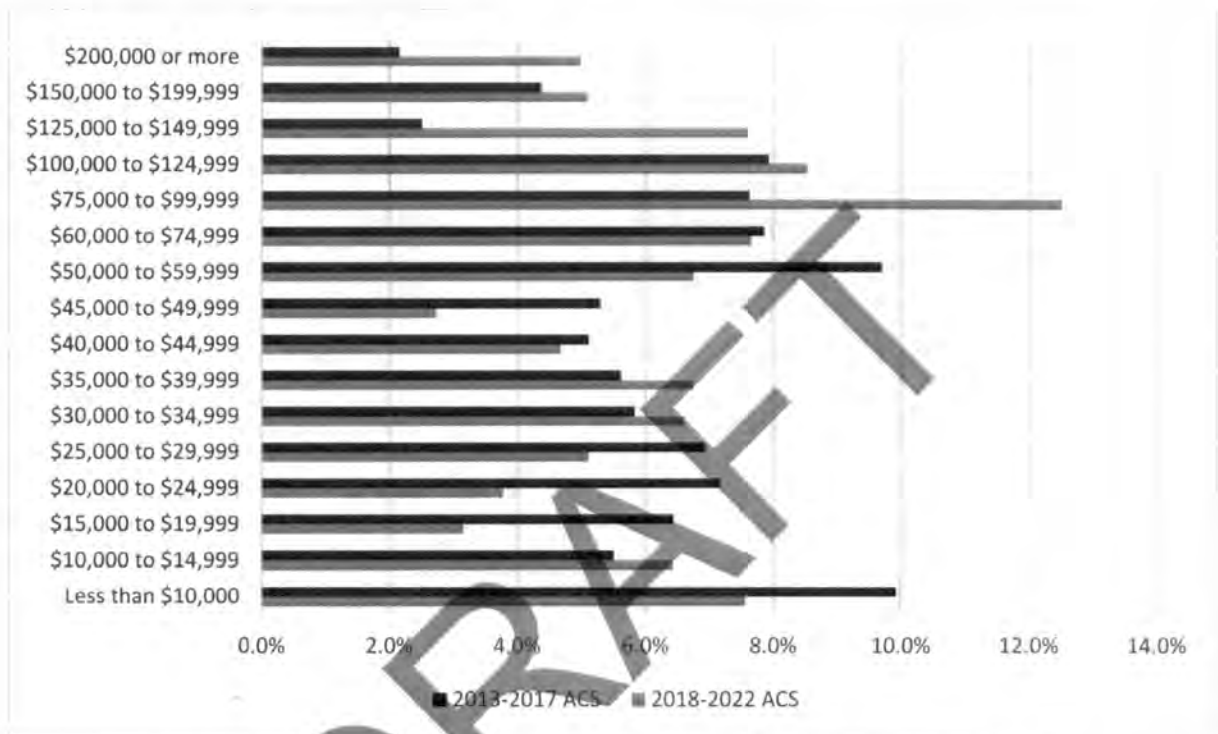
Household Income Trends in New Bern



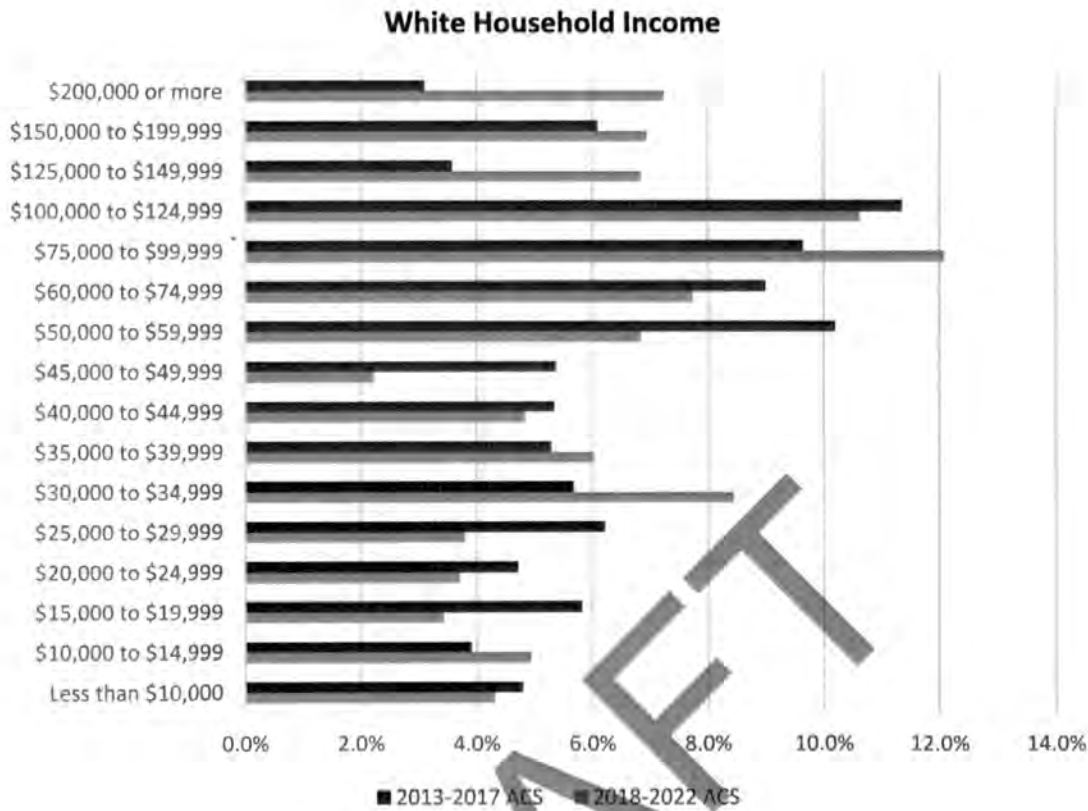
A comparison of household income data based on race from the 2013-2017 Five Year ACS and the 2018-2022 Five-Year ACS Estimates illustrate distinct patterns regarding racial makeup and economic stature of New Bern households.

The following charts illustrate the changes in household income by race between 2017 and 2022, with percentages pertaining to one specific income class in its respective racial group.

Household Income by Percentage in the City of New Bern



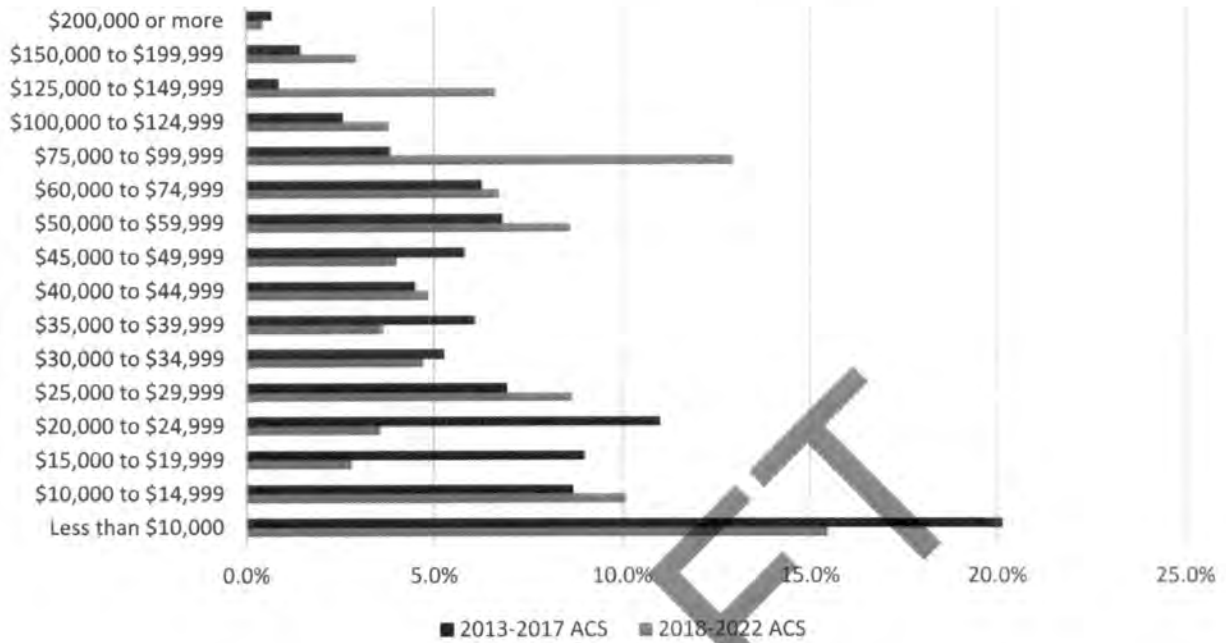
Additionally, this data shows what economic status these population shifts consist of. Both White and Black households saw a major increase of households earning between \$75,000 and \$99,999. The number of White households making more than \$75,000 increased by 1,036 households or 37.7%. Both groups also saw a large decrease of households earning less than \$35,000 yearly. Given the difference in income between those categories, it is likely that due to the effects of Hurricane Florence in 2018 and the Covid-19 Pandemic in 2020, low-income households in the City are moving out, perhaps to find more affordable housing; while high-income households are moving into the City.



The Black/African American population experienced a slight increase in population, gaining 514 households between 2017 to 2022. However, the patterns were not as clear-cut in comparison to White households; the number of Black/African American households in the City earning up to \$30,000 decreased by 323 households or 15.6%. Exceeding the trends of White households, the number of Black/African American households making more than \$75,000 increased by 746 households or 295.8%.

The exodus of both White and Black/African American households making less than \$30,000 is particularly drastic. While there were 2,066 White households earning less than \$30,000 annually in 2018, just 1,723 White households within this income level in 2022, a decrease of 343 households or 16.6%. The number of Black/African American households earning less than \$30,000 decreased as well, from 2,256 households in 2018 to 1,710 in 2022, a decrease of 546 households or 24.2%. While some households increased their income to above \$30,000 since 2018, the fact that many households making less than \$50,000 typically decreased as well, indicates it is more likely that many lower-income households left the City. However, the income group making up to \$10,000 can be particularly volatile as residents of these households may be able to secure a part- or full-time job, which would remove them from this income group.

Black/African American Household Income



The table below identifies the Section 8 Income Limits in the New Bern, NC MSA based on household size for FY 2023. The Median Income for a family of four (4) in the New Bern MSA is \$77,100 for 2023.

Craven County Metro Area Section 8 Income Limits for FY 2023

Income Category	1 Person	2 Person	3 Person	4 Person	5 Person	6 Person	7 Person	8 Person
Extremely Low (30%) Income Limits	\$26,450	\$30,200	\$34,000	\$37,750	\$40,800	\$43,800	\$46,850	\$49,850
Very Low (50%) Income Limits	\$15,900	\$19,720	\$24,860	\$30,000	\$35,140	\$40,280	\$45,420	\$49,850
Low (80%) Income Limits	\$42,300	\$48,350	\$54,400	\$60,400	\$65,250	\$70,100	\$74,900	\$79,750

Source: HUD Section 8 Income Limits

The following table highlights the current low- and moderate-income population in the City of New Bern. The block groups that have a population of more than 51% low- and moderate-income are highlighted in the following table. The City of New Bern has an overall low- and moderate-income population of 40.67%.

**Low- and Moderate-Income
Population for the City of New Bern**

CDBGNAME	TRACT	BLKGRP	LOWMOD	LOMODUNIV	LOWMODPCT
New Bern city	960101	1	240	1,735	13.83%
New Bern city	960401	1	370	1,685	21.96%
New Bern city	960401	2	585	2,505	23.35%
New Bern city	960402	1	620	1,520	40.79%
New Bern city	960402	2	490	1,530	32.03%
New Bern city	960402	3	40	695	5.76%
New Bern city	960403	1	105	530	19.81%
New Bern city	960403	3	115	1,100	10.45%
New Bern city	960404	2	305	1,110	27.48%
New Bern city	960500	1	285	880	32.39%
New Bern city	960500	2	1,490	2,575	57.86%
New Bern city	960500	3	1,430	3,545	40.34%
New Bern city	960500	4	565	1,245	45.38%
New Bern city	960600	1	500	1,855	26.95%
New Bern city	960600	2	260	910	28.57%
New Bern city	960600	3	360	1,005	35.82%
New Bern city	960600	4	360	665	54.14%
New Bern city	960700	1	540	1,190	45.38%
New Bern city	960700	2	70	675	10.37%
New Bern city	960800	1	850	860	98.84%
New Bern city	960800	2	575	1,005	57.21%
New Bern city	960800	3	240	335	71.64%
New Bern city	960800	4	570	650	87.69%

New Bern city	960900	1	630	1,245	50.60%
New Bern city	960900	2	1,310	1,485	88.22%
New Bern city	961001	1	120	800	15.00%
New Bern city	961001	2	820	4,500	18.22%
New Bern city	961001	3	1,610	5,445	29.57%
New Bern city	961002	4	175	435	40.23%

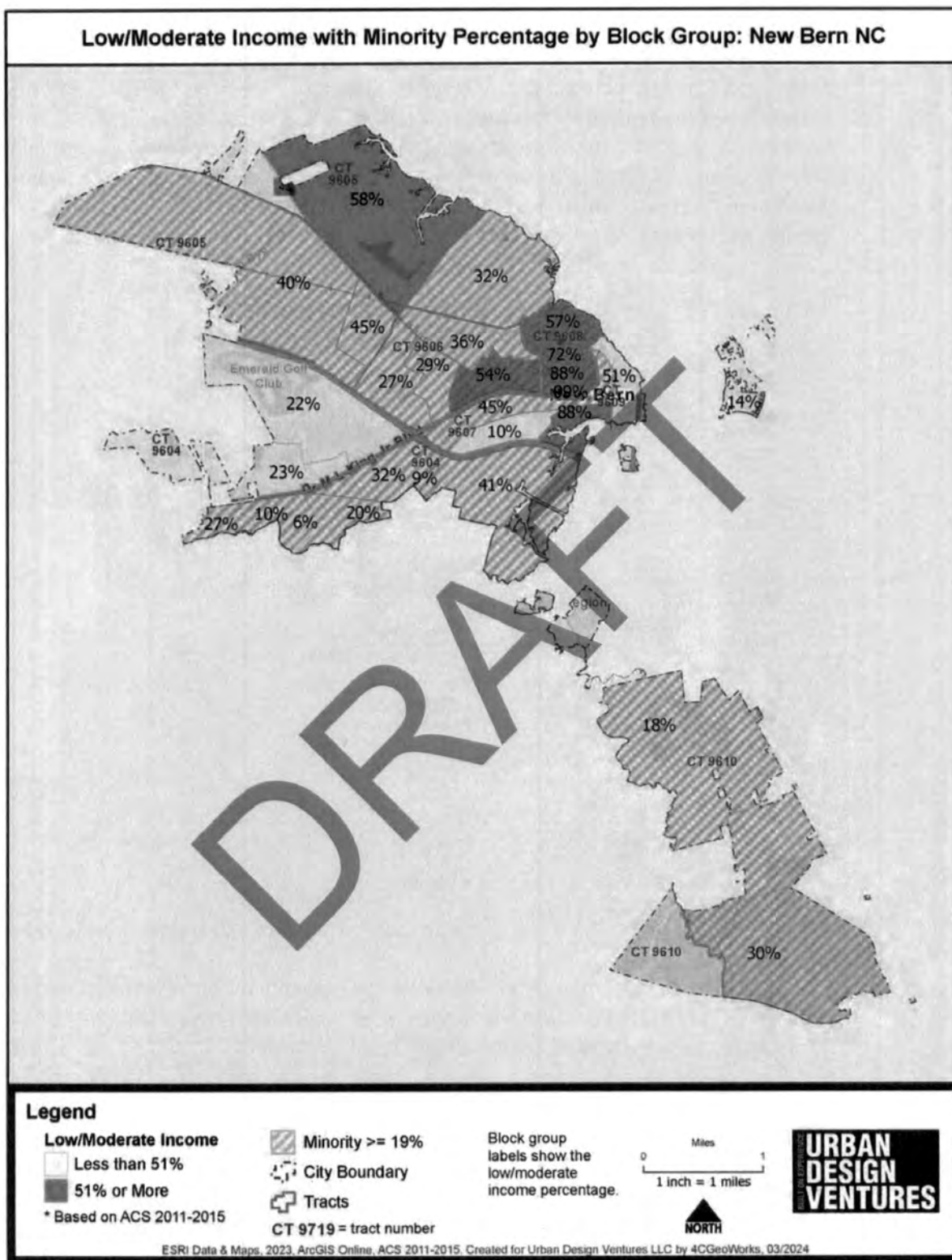
Source: U.S. Department of Housing and Urban Development

The following map illustrates areas of the City of New Bern with concentrations of low- and moderate-income residents. These Census Block Groups are above 51% low- and moderate-income. They are mostly concentrated in the central core of the City of New Bern. Additionally, a map of low- and moderate-income block groups with an overlay of all majority-minority block groups shows also that every minority-majority block group in the region has a greater than 51% low- and moderate-income percentage.

The maps below illustrate the percentages of Low-Income Population and Low-Income/Minority Population by Block Group in the City of New Bern. Nearly every census tract in the City has a minority population over 19%, including the low- and moderate-income sections of the City.

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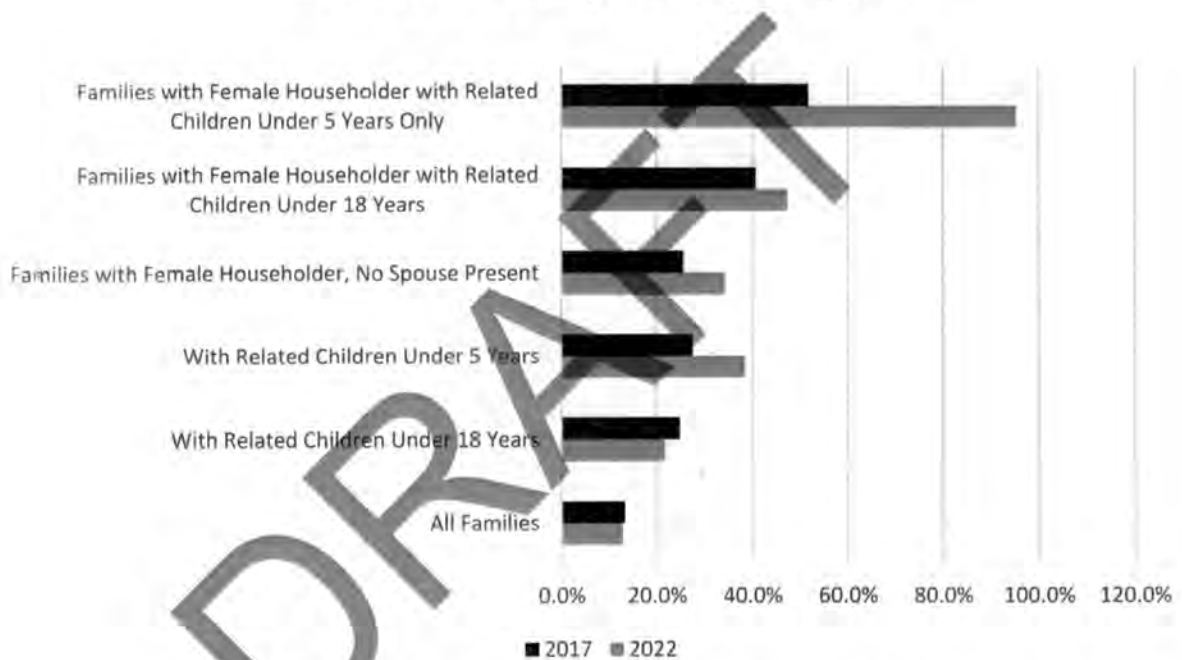




Source: HUD 2011-2015 Low/Mod Income Data

While the percentage of all families living in poverty experienced a slight decrease from 13.2% in 2017 to 12.7% in 2022, the percentage of female headed households living in poverty increased from 25.5% in 2017 to 34.3% according to the 2018-2022 American Community Survey estimates. The most notable increase during this time period occurred in female-headed household families with related children under 5 years of age cohort. According to the 2013-2017 American Community Survey, 41.7% of families with related children under 5 years old were living in poverty, and the 2018-2022 American Community Survey estimated an increase to 95.3%. The City’s poverty statistics for families with children are highlighted in the following chart.

Percentage of Families and Female-Headed Households in Poverty in the City of New Bern



Source: 2013-2017 & 2018-2022 American Community Survey

It is important to note that while the American Community Survey only presents an estimate, it is expected that the percentage of female-headed households with children living under the poverty level has increased since the previous Census.

Observations: Housing choice is highly dependent on price and, as a result, the income of the renter or buyer often dictates where they will live. Income and employment are not protected classes, though there are important trends relating to the incomes of particular racial or ethnic groups. Because Race, Color, Ethnicity, and National Origin/Ancestry are protected classes, it is important to note that residents of a certain racial or ethnic group may be driven away from living in a certain neighborhood, despite having the income to support living in that location.

D. Employment

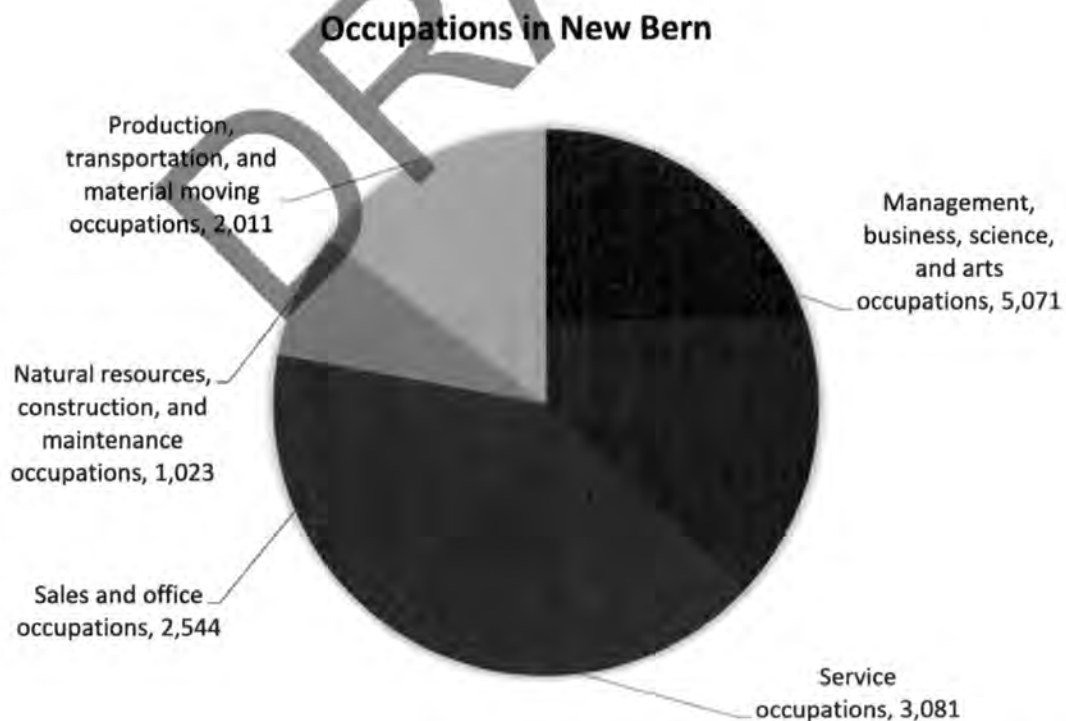
Occupation:

In 2017, according to 2013-2017 ACS Estimates, the total number of eligible workers (population 16 years and over) in New Bern was 23,527 persons. In 2017, 60.9% (14,318 persons) of eligible workers were in the labor force and 5.6% (1,318 persons) of eligible workers were unemployed.

In 2022, according to 2018-2022 ACS Estimates, the total number of eligible workers (population 16 years and over) in New Bern was 24,810 persons. In 2022, 59.5 percent (14,771 persons) of eligible workers were in the labor force and 2.6% (653 persons) of eligible workers were unemployed.

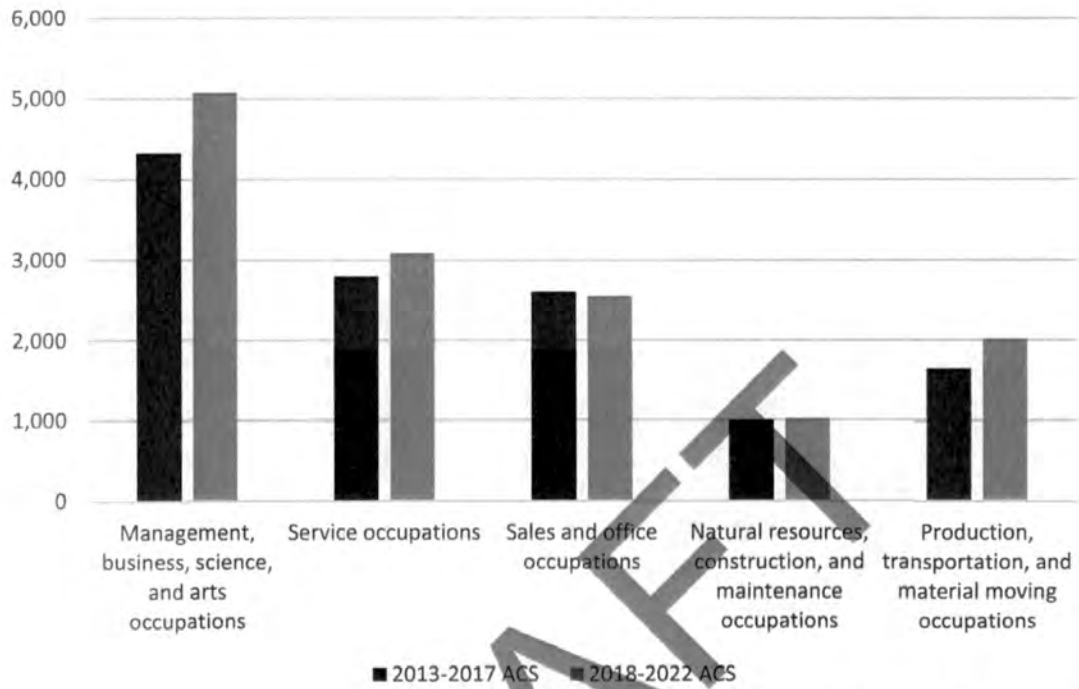
Workers in 2022 had a mean travel time to work of 18.0 minutes. Per the 2018-2022 American Community Survey, an estimated 40.9% of households (5,794 households) in the New Bern receive income from Social Security. The mean Social Security Income for 2022 was \$9,850.

The following charts outline the distribution of New Bern workers by occupation.



Source: 2018-2022 ACS

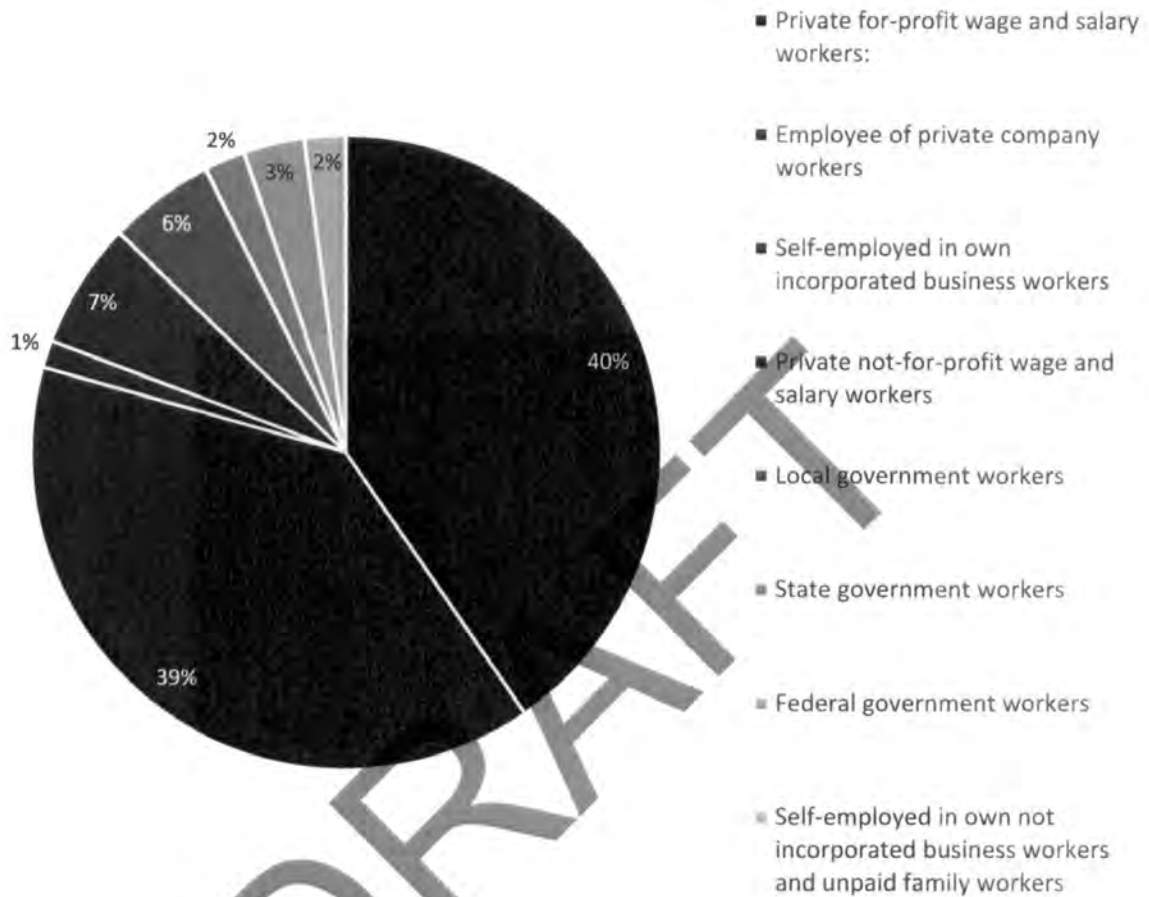
Occupation Change in New Bern



Source: 2013-2017 ACS and 2018-2022 ACS

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Worker Class in New Bern

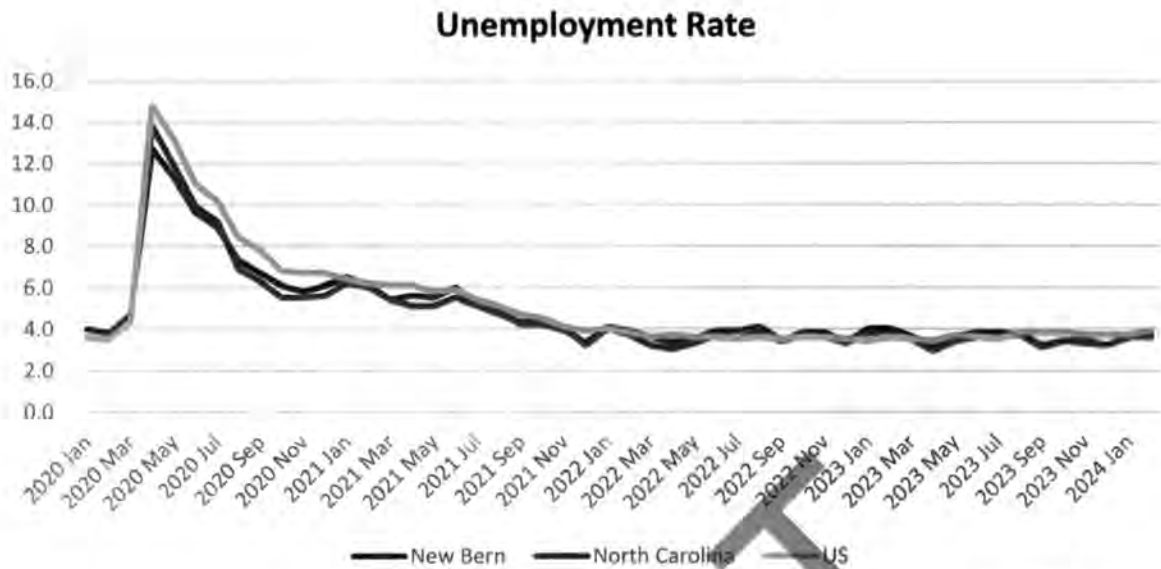


Source: 2013-2017 ACS and 2018-2022 ACS

Observations: Source of Income is not a protected class in the City of New Bern. For this reason, a landlord could refuse to rent to a tenant based on their particular occupation.

Unemployment Rate:

The unemployment rate for the City of New Bern is shown on the following graph with the unemployment rate in the State of North Carolina and the national unemployment rate. The unemployment rate in the City of New Bern was 3.6% in February 2024 (the latest data available). The State of North Carolina had a 3.7% unemployment rate, which was below the Nation Average at 3.9% during the same period.



From January 2020 to February 2024, the City’s unemployment rate was approximately similar to the State’s unemployment rate and an average of 0.3 percentage points lower than the unemployment rate of the United States.

The trends suggest that since the Covid-19 Pandemic, the City of New Bern’s unemployment trends have broadly followed the same patterns as the state and national unemployment rates during the same period.

Observations: Source of Income is not a protected class in the City of New Bern. For this reason, a landlord could refuse to rent to a tenant that is unemployed, but able to support their rent through some other means, such as the Section 8 Housing Choice Voucher program. The unemployment rate is consistent with the rate for North Carolina and just under the National Unemployment Rate.

E. Housing Profile

49.9% of the City’s housing stock was built prior to 1980. Almost 5 out of 10 houses in the City of New Bern could be at risk for having lead-based paint. Lead based paint was banned in 1978. Only 15.3% of its housing stock was built after 2009. The highest percentage of in-use housing stock was constructed between 2000 and 2009, which makes up 20.1% of the City’s current housing stock. This decreased over the next decade from 2010 to 2019, where only 14.0% of current housing stock was constructed. The following chart illustrates the year that housing structures were built in the City of New Bern based on the 2013-2017 and 2018-2022 American Community Survey.

Housing Profile:

The following table details the year that housing structures were built in the City of New Bern as of 2022. According to the 2018-2022 ACS data, 13.0% of all housing units were built prior to 1950 (70 years ago).

Year Housing Structure Built in New Bern

Housing Profile	2013-2017 ACS		2018-2022 ACS	
	#	%	#	%
Total	15,051	100%	16,265	100%
Built 2020 or later	N/A	N/A	210	1.3%
Built 2010 to 2019	N/A	N/A	2,276	14.0%
Built 2000 to 2009	3,746	24.9%	3,273	20.1%
Built 1990 to 1999	2,438	16.2%	2,392	14.7%
Built 1980 to 1989	1,954	13.0%	2,191	13.5%
Built 1970 to 1979	1,786	11.9%	1,629	10.0%
Built 1960 to 1969	1,223	8.1%	986	6.1%
Built 1950 to 1959	1,390	9.2%	1,182	7.3%
Built 1940 to 1949	755	5.0%	931	5.7%
Built 1939 or earlier	922	6.1%	1,195	7.3%

Source: 2013-2017 ACS and 2018-2022 ACS

The majority of housing units in New Bern are single-family detached comprising 63.7% percent (10,360 units) of all housing units.

The 2018-2022 American Community Survey estimates that the median value of owner-occupied homes in New Bern has increased since 2017 from \$151,200 to \$202,500. The latest available data from real estate listings presented a higher value of home values in the City; according to Zillow, the median list price of a home in New Bern was \$344,000 as of March 2024, which is a \$141,500 increase in the past 7 years.

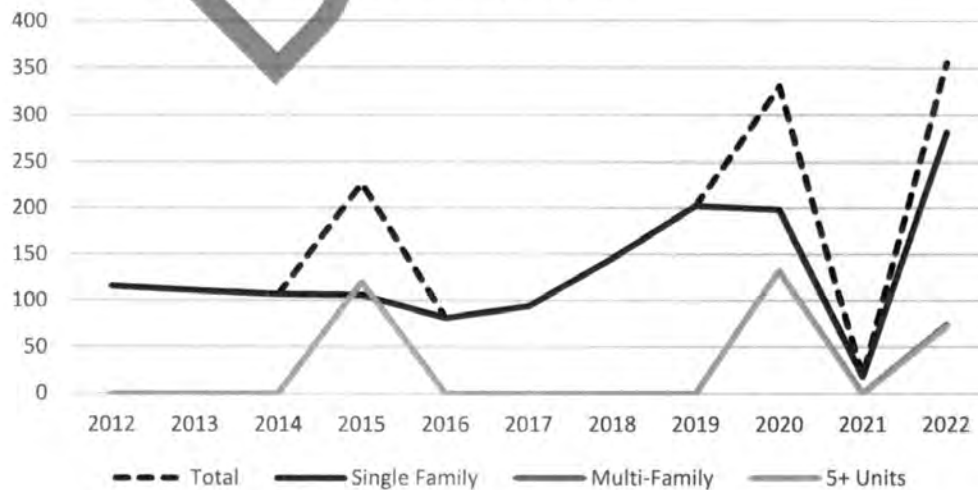
The following table contains data on the number of permits for residential construction issued by the City of New Bern. From 2012-2022 the City mainly issued permits for single-family units. This changed in 2014, 2020, and 2022 with an increase in the total number of new multi-family units constructed. The number of new permits peaked in 2022, with a large increase of 74 multi-family units and 281 single-family units.

Units Authorized by Building Permits – New Bern

Year	Total	Single Family	Multi-Family	5+ Units
2022	355	281	74	72
2021	18	18	0	0
2020	330	198	132	132
2019	202	202	0	0
2018	145	145	0	0
2017	94	94	0	0
2016	81	81	0	0
2015	226	106	120	120
2014	107	107	0	0
2013	111	111	0	0
2012	116	116	0	0

Source: SOCDs Building Permits Database, HUD

Building Permits by Number of Units Issued in the City of New Bern



Source: SOCDs Building Permits Database, HUD

The year with the highest number of total units and single-family units authorized was 2022.

Observations: Affordability is an important component of fair housing, as income disparities appear between different racial, ethnic, gender, age, and other groups. The availability of affordable housing in all neighborhoods of the City allows for those within the protected classes to live within whatever neighborhood they may choose, as opposed to being restricted to certain neighborhoods based purely on monetary options.

F. Financing

Owner Costs:

The median monthly housing cost for owner-occupied households was \$997 in 2017 and \$1,042 in 2022. The median monthly housing cost for owner-occupied households increased by 4.5 percent, or \$45, from 2017 to 2012.

The following table illustrates mortgage status and selected monthly owner costs in 2017 and 2022.

Monthly Owner Costs in New Bern

Monthly Owner Cost	2013-2017 ACS		2018-2022 ACS	
	Number of Housing Units	Percentage	Number of Housing Units	Percentage
Owner-Occupied Housing Units	6,567	100%	8,279	100%
Less than \$300	287	4.4%	186	2.2%
\$300 to \$499	981	14.9%	1,150	13.9%
\$500 to \$799	1,175	17.9%	1,560	18.8%
\$800 to \$999	851	13.0%	1,038	12.5%
\$1,000 to \$1,499	1,653	25.2%	2,396	28.9%
\$1,500 to \$1,999	938	14.3%	1,169	14.1%
\$2,000 to \$2,499	291	4.4%	379	4.6%
\$2,500 to \$2,999	231	3.5%	112	1.4%
\$3,000 or more	160	2.4%	289	3.5%
Median Owner Costs without a Mortgage	464	(X)	544	(X)
Median Owner Costs with a Mortgage	1,256	(X)	1,365	(X)

Source: 2013-2017 and 2018-2022 American Community Survey

The following table illustrates housing costs for owner-households in 2017 and 2022 according to the 2013-2017 ACS and the 2018-2022 ACS.

Monthly Owner Costs as a Percentage of Household Income in New Bern

Owner Costs as a % of Income	2013-2017 ACS		2018-2022 ACS	
	Number of Housing Units	Percentage	Number of Housing Units	Percentage
Owner-Occupied Housing Units	6,567	100%	8,279	100%
Less than \$20,000	667	10.2%	717	8.7%
Less than 20 percent	104	1.6%	16	0.2%
20 to 29 percent	74	1.1%	29	0.4%
30 percent or more	489	7.4%	672	8.1%
\$20,000 to \$34,999	936	14.3%	952	11.5%
Less than 20 percent	130	2.0%	221	2.7%
20 to 29 percent	197	3.0%	137	1.7%
30 percent or more	609	9.3%	594	7.2%
\$35,000 to \$49,999	984	15.0%	958	11.6%
Less than 20 percent	389	5.9%	275	3.3%
20 to 29 percent	339	5.2%	180	2.2%
30 percent or more	256	3.9%	503	6.1%
\$50,000 to \$74,999	1,474	22.4%	1,191	14.4%
Less than 20 percent	692	10.5%	698	8.4%
20 to 29 percent	404	6.2%	353	4.3%
30 percent or more	378	5.8%	140	1.7%
\$75,000 or more	2,484	37.8%	4,390	53.0%
Less than 20 percent	1,937	29.5%	3,769	45.5%
20 to 29 percent	428	6.5%	527	6.4%
30 percent or more	119	1.8%	94	1.1%
Zero or negative income	22	0.3%	71	0.9%
No cash rent	NA	NA	NA	NA

Source: 2013-2017 and 2018-2022 American Community Survey

HUD defines a housing cost burden as a household that pays over 30 percent or more of its monthly income on housing costs. In 2017, 28.2% (1,851 units) of owner-occupied units were cost burdened and 24.2% (2,003 units) of owner-occupied households in 2022 were cost burdened.

The value of housing has steadily increased throughout the last 10 years. According to Zillow's website on the housing market in New Bern, the median list price in recent months is just over \$344,000. According to the 2013-2017 ACS, the median home value was \$151,200 which has increased to \$202,500 according to the 2018-2022 ACS data. A very slight increase in the median contract rent (from the same sources) also occurred. Median rent rose from \$1,011/month to \$1,019/month. Nearly a third (30.8%) of all rental housing units were in the \$500 to \$999 category per month, while 41.6% of all rental housing units were in the \$1,000 to \$1,499 category.

Another source of housing values is Redfin.com. The median sales price in April 2024 was \$339,500, an increase of 4.9% over the previous year. 62 homes were sold in March 2024. The median home lasted 34 days on the market. According to Zillow.com, there are 179 homes for sale. The median listing price for homes for sale in New Bern was \$344,900 in March of 2024. Wealthier neighborhoods in New Bern include Bedford and Lynndale, with median listing prices of \$572,354 and \$442,081, respectively.

Observations: Affordability is an important component of fair housing, as income disparities appear between different racial, ethnic, gender, age, and other groups. Cost burdens can appear disproportionately across the City, occurring more frequently in areas with high concentrations of minorities or elderly residents. On the basis of Race, Color, Ethnicity, National Origin, and possibly Disability or Familial Status, residents restricted to areas with housing that carries a substantial cost burden may be discriminatory.

Foreclosures:

According to www.realtytrac.com, the City of New Bern had 24 foreclosed homes for sale in April 2024 while Craven County had a total of 36. Out of 8,279 owner-occupied housing units, New Bern has a foreclosure rate of 1 in every 345 homes.

The foreclosure rate in the City still remains higher than that of the State of North Carolina, which has a foreclosure rate of 1 in every 5,492 homes.

Observations: Foreclosures are a fair housing issue in that they can disproportionately affect members of the protected classes, specifically based on Race, Color, or Disability. Neighborhoods with a number of vacant structures have typically experienced a disproportionate number of foreclosures, and a number of these neighborhoods with high numbers of vacancies have a majority of their population that identifies as a racial or ethnic minority.

Renter Costs:

The median monthly housing cost for renter-occupied households was \$844 in 2017; and \$1,019 in 2022. The median monthly housing cost for renter-occupied households increased by 20.7%, or \$175, from 2017 to 2022. Dollar amounts are adjusted for inflation. This increase has been caused by an increase in demand for rental housing from the in-migration of new residents.

The following table illustrates selected monthly renter costs in 2017 and 2022.

Selected Monthly Renter Costs in New Bern

Monthly Renter Cost	2013-2017 ACS		2018-2022 ACS	
	Number of Housing Units	Percentage	Number of Housing Units	Percentage
Renter-Occupied Housing Units	6,415	100%	5,903	100%
Less than \$300	810	12.6%	422	7.1%
\$300 to \$499	369	5.8%	569	9.6%
\$500 to \$799	1,567	24.4%	643	10.9%
\$800 to \$999	1,574	24.5%	1,160	19.7%
\$1,000 to \$1,499	1,541	24.0%	2,433	41.2%
\$1,500 to \$1,999	245	3.8%	403	6.8%
\$2,000 to \$2,499	134	2.1%	161	2.7%
\$2,500 to \$2,999	0	0.0%	0	0.0%
\$3,000 or more	27	0.4%	59	1.0%
No Cash Rent	148	2.3%	53	0.9%
Median (dollars)	844	(X)	1,019	(X)

Source: 2013-2017 and 2018-2022 American Community Survey

The following table illustrates housing costs for renter-occupied households in 2017 and 2022 according to the 2013-2017 ACS and the 2018-2022 ACS.

Selected Monthly Renter Costs as a Percentage of Household Income in New Bern

Renter Costs as a % of Income	2013-2017 ACS		2018-2022 ACS	
	Number of Rental Units	Percentage	Number of Rental Units	Percentage
Renter-Occupied Housing Units	6,415	100%	5,903	100%

Less than \$20,000	2,009	31.3%	1,527	25.9%
Less than 20 percent	84	1.3%	93	1.6%
20 to 29 percent	327	5.1%	201	3.4%
30 percent or more	1,598	24.9%	1,233	20.9%
\$20,000 to \$34,999	1,630	25.4%	1,248	21.1%
Less than 20 percent	62	1.0%	221	3.7%
20 to 29 percent	422	6.6%	117	2.0%
30 percent or more	1,146	17.9%	910	15.4%
\$35,000 to \$49,999	1,091	17.0%	1,031	17.5%
Less than 20 percent	231	3.6%	146	2.5%
20 to 29 percent	603	9.4%	319	5.4%
30 percent or more	257	4.0%	566	9.6%
\$50,000 to \$74,999	771	12.0%	826	14.0%
Less than 20 percent	383	6.0%	268	4.5%
20 to 29 percent	344	5.4%	439	7.4%
30 percent or more	44	0.7%	119	2.0%
\$75,000 or more	704	11.0%	1,106	18.7%
Less than 20 percent	633	9.9%	885	15.0%
20 to 29 percent	42	0.7%	193	3.3%
30 percent or more	29	0.5%	28	0.5%
Zero or negative income	62	1.0%	112	1.9%
No cash rent	148	2.3%	53	0.9%

Source: 2013-2017 and 2018-2022 American Community Survey

Gross Rent as a Percentage of Household Income in New Bern

Rental Cost as a % of Income	2013-2017 ACS		2018-2022 ACS	
	Number of Housing Units	Percentage	Number of Housing Units	Percentage
Rental Units paying rent	6,415	100.0%	5,903	100.0%
Less than 15 percent	232	3.6%	149	2.5%
15 to 19 percent	297	4.6%	667	11.3%
20 to 24 percent	864	13.5%	797	13.5%
25 to 29 percent	960	15.0%	692	11.7%
30 to 34 percent	778	12.1%	577	9.8%
35 percent or more	418	6.5%	497	8.4%
Not computed	306	4.8%	344	5.8%

Source: 2013-2017 and 2018-2022 American Community Survey

HUD defines a housing cost burden as a household that pays over 30 percent or more of its monthly income on housing costs. In 2017, 47.9% (3,074 units) of renter-occupied units were cost burdened and 48.4% (2,856 units) of renter-occupied households in 2017 were cost burdened.

The 2019 and 2020 HUD Fair Market Rents and HOME Rent Limits for the Metro Area are shown in the table below.

Fair Market Rents (FMR) and HOME Rent Limits for the Metro Area

Rent	FY 2023	FY 2024	Change in FMR FY 2023 to FY 2024
Efficiency	\$829	\$928	\$99
One-Bedroom	\$834	\$935	\$101
Two-Bedroom	\$1,092	\$1,228	\$136
Three-Bedroom	\$1,465	\$1,660	\$195
Four-Bedroom	\$1,860	\$2,084	\$224

Source: U.S. Department of Housing and Urban Development

Fair Market Rents (FMRs) are primarily used to determine payment standard amounts for HUD assisted housing. The High HOME Rent Limit for an area is the lesser of the Section 8 Fair Market Rent (FMR) for the area or a rent equal to 30% of the annual income of a family whose income equals 65% of the area median income, as determined by HUD. The Low HOME Rent Limit for an area is 30% of the annual income of a family whose income equals 50% of the area median income, as determined by HUD, capped by the High HOME Rent Limit. HUD’s Economic and Market Analysis Division calculates the HOME rents each year using the FMRs and the Section 8 Income Limits.

The area median rent is estimated to be \$1,019 according to the 2018-2022 ACS data, while the median rent in the City of New Bern for a two-bedroom apartment is \$1,198 according to Zillow in April 2024. The average rents posted commercially exceed the area median rent and fair market rent.

Observations: Affordability is an important component of fair housing, as income disparities appear between different racial, ethnic, gender, age, and other groups. Rents often create cost burdens for protected class groups. This often creates neighborhoods with concentrations of minorities or impoverished households.

Evictions:

According to Princeton University’s Eviction Lab, there were over 1,100 eviction filings in Craven County in 2018 (the latest for which data is available), for an eviction filing rate of 6.9%. This accounts for approximately 3 evictions per day. While this number is 0.87 percentage points below the United States average eviction filing rate, evictions still disproportionately affect members of protected classes.

Observations: Evictions are a fair housing issue in that they can disproportionately affect members of the protected classes, specifically based on Race, Color, Disability, or Familial Status. Neighborhoods with a high number of evictions also have high numbers of minority residents, and high numbers of single-parent households, which are all potential sources of housing discrimination.

G. Household Types

Based on a comparison between the 2017 to 2022 population, the City of New Bern increased by 5.8%. The number of households increased by 9.2%, showing that the housing demand has outpaced the population growth over the same period. The median income of the area increased by 33.2% from \$41,807 to \$55,673 from 2017 to 2022. This increase in median income represents a change in nominal dollars and not a change in real dollars. In order to calculate the change in real dollars, the Consumer Price Index is used to calculate the inflation rate for a given period. Between 2009 and 2020, the cumulative inflation rate was approximately 20.64%, meaning that the \$41,148 median income in 2009 would be \$49,640 if it were expressed in terms of 2020 dollars. By taking into consideration the rate of inflation, the median income in New Bern has not kept up with the rate of inflation.

Changes Between 2009 & 2020

Demographics	Base Year: 2009	Most Recent Year: 2020	% Change
Population	30,215	29,985	-1%
Households	12,745	13,665	7%
Median Income	\$41,148.00	\$43,406.00	5%

2000 Census (Base Year), 2016-2020 ACS (Most Recent Year)

Note:

According to the U.S. Census Bureau the following notes were issued in regard to the CHAS (Comprehensive Housing Affordability Strategy) and the discrepancies in adding up the totals in the following tables. As with the CHAS 2000 and all other special tabulations of Census data, the Census Bureau requires that the CHAS data be rounded. The rounding scheme is as follows: 0 remains 0; 1-7 rounds to 4; 8 or greater rounds to nearest multiple of 5. This causes discrepancies when adding up smaller geographies and when adding up data within CHAS tables. Consider a city where the CHAS data indicate that there were 4 renter households with extremely low income and 4 owner households with extremely low income. One might be tempted to conclude that there are 8 total households with extremely low income. For instance, the CHAS table indicates that there are actually a total of 15 extremely low income households, that would appear to be contradictory. This situation is the result of rounding. The City could have 6 renter households with extremely low income and 7 owner households with extremely low income, which is a total of 13 extremely low income households; but all of these numbers would be rounded, to 4, 4, and 15.

Number of Households Table – City of New Bern

	0-30% AMI	>30-50% AMI	>50-80% AMI	>80-100% AMI	>100% AMI
Total Households *	2,065	2,085	2,655	1,245	5,615
Small Family Households *	470	590	770	520	2,209
Large Family Households *	165	330	75	80	520
Household contains at least one person 62-74 years of age	620	355	810	225	1,690
Household contains at least one person age 75 or older	285	350	660	210	540
Households with one or more children 6 years old or younger *	384	500	285	90	465

Data Source: 2016-2020 CHAS

Of all households, nearly one-half (41.1%) have a higher income than the HUD Area Median Income (AMI) for the New Bern MSA. This includes both small and large family households, though there are few large family households under 100% AMI. The remaining 58.9% of total households make less than the AMI, with the largest remaining group (19.4% of total households) being those making between 50-80% of AMI. Households that make 30% of AMI have an annual income of \$23,124; as HUD defines affordable housing as paying no more than 30% of income on rent, this leaves low-income households with less than \$1,927 per month (without taking out taxes) to spend on housing. The largest housing problem in the City of New Bern is housing affordability. According to the 2018-2022 ACS data, an estimated 48.4% of all renter households are

cost burdened by 30% or more, and an estimated 24.2% of all owner households are cost burdened by 30% or more. Approximately 30.2% of owner occupied households with a mortgage are cost burdened by 30% or more, compared to only 14.3% of owner occupied households without a mortgage.

Housing Problems (Households with one of the listed needs) – City of New Bern

	Renter					Owner				
	0-30% AMI	>30-50% AMI	>50-80% AMI	>80-100% AMI	Total	0-30% AMI	>30-50% AMI	>50-80% AMI	>80-100% AMI	Total
Substandard Housing - Lacking complete plumbing or kitchen facilities	210	0	10	0	220	25	0	0	0	25
Severely Overcrowded - With >1.51 people per room (and complete kitchen and plumbing)	70	0	15	0	85	0	15	0	0	15
Overcrowded - With 1.01-1.5 people per room (and none of the above problems)	40	145	45	0	230	0	60	4	80	144
Housing cost burden greater than 50% of income (and none of the above problems)	640	424	40	0	1,104	460	280	60	20	820
Housing cost burden greater than 30% of income (and none of the above problems)	170	440	505	50	1,165	35	185	630	120	970
Zero/negative Income (and none of the above problems)	140	0	0	0	140	60	0	0	0	60

Data Source: 2016-2020 CHAS

The following table illustrates the discrepancies between homeowners and renters regarding housing problems. There are more owner-occupied housing units than renter-occupied units (8,279 to 5,903, respectively), however renters face a much higher rate of housing problems.

Housing Problems (Households with one or more Severe Housing Problems: Lacks kitchen or complete plumbing, severe overcrowding, severe cost burden) – City of New Bern

	Renter					Owner				
	0-30% AMI	>30-50% AMI	>50-80% AMI	>80-100% AMI	Total	0-30% AMI	>30-50% AMI	>50-80% AMI	>80-100% AMI	Total
Having 1 or more of four housing problems	960	564	105	0	1,629	480	355	65	100	1,000
Having none of four housing problems	525	765	1,180	550	3,020	95	400	1,295	600	2,390
Household has negative income, but none of the other housing problems	0	0	0	0	0	0	0	0	0	0

Data Source: 2016-2020 CHAS

There are more renters than owners (1,629 vs. 1,000) that face severe housing problems.

Observations: Renters and Homebuyers can experience discrimination based on Familial Status. Nonfamily households and large households experience disproportionate overcrowding because they cannot afford the rent for a larger unit. This creates a lack of housing choice.

H. Cost Burden

Overall, there is a shortage of decent, affordable housing in the City of New Bern. Many of the City's lower income households are paying more than 30% of their total household income on housing-related costs. The following information was noted: 1,355 White households were cost burdened by 30% to 50%, which is 53.3% of the total cases of households that were considered cost overburdened by between 30% and 50%. This number is below the 65.5% of the total number of households that the White category comprises. Also, there are 870 White households who are severely cost overburdened by greater than 50%.

A total of 910 Black/African American households were considered cost overburdened by between 30% and 50%, which is 35.8% of the total cases of households that were considered cost overburdened by between 30% and 50%. This number is slightly above the 31.9% of the total number of households that the Black/African American category comprises. There were 965 Black/African American households who were reported as severely cost burdened by greater than 50%.

A total of 60 Asian households were severely cost burdened by 30% to 50%, which is 2.4% of the total cases of households that were considered cost overburdened by between 30% and 50%. This number is slightly below the 3.8% of the total number of households that the Asian category comprises and 75 Asian households were severely cost burdened by greater than 50%.

A total of 170 Hispanic households were considered cost overburdened by between 30% and 50%, which is 6.7% of the total cases of households that were considered cost overburdened by between 30% and 50%. This number is slightly above the 5.0% of the total number of households that the Hispanic category comprises. 99 Hispanic households were severely cost burdened by greater than 50%.

Lastly, 10 American Indian, Alaska Native households were cost burdened by 30% to 50%, and no American Indian, Alaska Native households were severely cost burdened by greater than 50%.

Housing Cost Burden – City of New Bern

Housing Cost Burden	<=30%	30-50%	>50%	No / negative income (not computed)
Jurisdiction as a whole	8,265	2,545	2,075	85
White	5,420	1,355	870	35
Black / African American	2,045	910	965	45
Asian	270	60	75	0
American Indian, Alaska Native	30	10	0	0
Pacific Islander	0	0	0	0
Hispanic	445	170	99	0

Data Source: 2016-2020 CHAS

A total of 870 White households were considered severely cost overburdened by greater than 50%, which is 41.9% of the total cases of households that were considered cost overburdened by greater than 50%. This number is below the 65.5% of the total number of households that the White category comprises. A total of 75 Asian households were considered severely cost overburdened by greater than 50%, which is 3.6% of the total cases of households that were considered cost overburdened by greater than 50%. This number is slightly higher than the 3.8% of the total number of households that the Asian population comprises. A total of 9 Hispanic households were considered severely cost overburdened by greater than 50%, which is 4.8% of the total number of households that were considered cost overburdened by greater than 50%. This number is slightly below the 5.0% of the total number of households that the Hispanic category comprises.

When examining the percentage of each racial or ethnic group that has a housing problem, a severe housing problem, or facing a cost burden, compared to that racial or ethnic group overall, a different picture presents itself. According to the 2016-2020 CHAS data, the following percentages of households are cost burdened by 30-50%:

- 15.9% of all White households
- 21.9% of Black/African American households
- 22.7% of American Indian and Alaska Native households
- 12.0% of Asian households
- 26.2% of Hispanic households

The following percentages of households are cost burdened by over 50%:

- 10.2% of White households
- 23.3% of Black households
- 22.7% of American Indian and Alaska Native households
- 15.0% of Asian households
- 15.3% of Hispanic households

Observations: Populations experiencing cost burdens disproportionately are often racial or ethnic minorities. Steering populations into housing that is prohibitively expensive can be a form of housing discrimination, which in this context affects those with protected class bases of Race, Color, Ethnicity, National Origin/Ancestry, and possibly Citizenship or Immigration Status or Preferred Language. A total of 36.3% of all households in New Bern are considered cost burdened.

I. Housing Problems

A household is considered to have a housing problem if it contains one or more of the four (4) HUD designated housing problems; The four housing problems are: lacks complete kitchen facilities; lacks complete plumbing facilities; has more than one person per room; and is cost burden greater than 30%. The following tables illustrate the disproportionate needs in the City of New Bern:

**0%-30% of Area Median
Income (Extremely Low Income) – City of New Bern**

Housing Problems*	Has one or more of four housing problems	Has none of the four housing problems	Household has no/ negative income, but none of the other housing problems
Jurisdiction as a whole	1,240	420	80
White	420	155	35
Black/African American	690	265	45
Asian	55	0	0
American Indian, Alaska Native	0	0	0
Pacific Islander	0	0	0
Hispanic	40	0	0

Data Source: 2016-2020 CHAS

**The four housing problems are:*

1. Lacks complete kitchen facilities,
2. Lacks complete plumbing facilities,
3. More than one person per room,
4. Cost Burden greater than 30%

At the 0-30% Area Median Income Category, 33.9% of the population with a housing problem is White, 55.6% of the population with a housing problem is Black or African American, 4.4% of the population with a housing problem is Asian, and 3.2% of the population with a housing problem is Hispanic or Latino. No other racial or ethnic group had high instances of housing problems to make up more than 1% of the population with a housing problem.

**30%-50% of Area
Median Income (Low-Income) – City of New Bern**

Housing Problems*	Has one or more of four housing problems	Has none of the four housing problems	Household has no/ negative income, but none of the other housing problems
Jurisdiction as a whole	1,275	385	0
White	465	155	0
Black/African American	605	230	0
Asian	130	0	0
American Indian, Alaska Native	0	0	0
Pacific Islander	0	0	0
Hispanic	20	0	0

Data Source: 2016-2020 CHAS

**The four housing problems are:*

1. Lacks complete kitchen facilities,
2. Lacks complete plumbing facilities,
3. More than one person per room,
4. Cost Burden greater than 30%

At the 30-50% Area Median Income Category, 36.5 of the population with a housing problem is White; 47.5% of the population with a housing problem is Black or African American; 10.2% of the population with a housing problem is Asian; and 1.6% of the population with a housing problem is Hispanic or Latino. No other racial or ethnic group had high enough instances of housing problems to make up more than 1% of the population with a housing problem.

50%-80% of Area Median Income – City of New Bern

Housing Problems*	Has one or more of four housing problems	Has none of the four housing problems	Household has no/negative income, but none of the other housing problems
Jurisdiction as a whole	1,360	725	0
White	785	350	0
Black/African American	360	270	0
Asian	65	0	0
American Indian, Alaska Native	10	0	0
Pacific Islander	0	0	0
Hispanic	130	80	0

Data Source: 2016-2020 CHAS

*The four housing problems are:

1. Lacks complete kitchen facilities, 2. Lacks complete plumbing facilities, 3. More than one person per room, 4. Cost Burden greater than 30%

At the 50-80% Area Median Income Category, 57.7% of the population with a housing problem is White; 26.5% of the population with a housing problem is Black or African American; 4.8% of the population with a housing problem is Asian; and 9.6% of the population with a housing problem is Hispanic or Latino. No other racial or ethnic group had high enough instances of housing problems to make up more than 1% of the population with a housing problem.

80%-100% of Area Median Income – City of New Bern

Housing Problems*	Has one or more of four housing problems	Has none of the four housing problems	Household has no/negative income, but none of the other housing problems
Jurisdiction as a whole	445	1,035	0
White	245	560	0
Black/African American	75	285	0
Asian	45	30	0
American Indian, Alaska Native	0	0	0
Pacific Islander	0	0	0
Hispanic	85	140	0

Data Source: 2016-2020 CHAS

*The four housing problems are:

1. Lacks complete kitchen facilities, 2. Lacks complete plumbing facilities, 3. More than one person per room, 4. Cost Burden greater than 30%

At the 80-100% Area Median Income Category, 55.1% of the population with a housing problem is White; 16.9% of the population with a housing problem is Black or African American; 10.1% of the population with a housing problem is Asian; and 19.1% of the population with a housing problem is Hispanic or Latino. No other racial or ethnic group had high enough instances of housing problems to make up more than 1% of the population with a housing problem.

The racial composition of households in the City of New Bern, according to the 2016-2020 American Community Survey, was 65.5% White; 32.0% African American/Black; 3.8% Asian; 0.3% American Indian, and 0% Pacific Islander. The Hispanic or Latino population was 5.0%. In the 0-30% and 30-50% Area Median Income category, African American/Black households had one or more housing problems, with a disproportionate need at 55.6% and 47.5%, respectively. There are no other racial or ethnic groups with disproportionate need at other income levels.

Observations: Populations experiencing housing problems disproportionately are often racial or ethnic minorities. Refusal of landlords to improve housing that is substandard can be a form of housing discrimination, which in this context affects those with protected class bases of Race, Color, Ethnicity, National Origin/Ancestry, and possibly Citizenship or Immigration Status or Preferred Language. Another issue is the lack of financial resources of homeowners to improve their properties to bring them up to code standards.

J. Segregation

One way to consider racial distribution in a community is to look at the dissimilarity indices for an area. The **Dissimilarity Index (DI)** is based on the data from the 1980-2020 U.S. Censuses which measures whether one particular group is evenly distributed across census tracts in the metropolitan area in the same way as another group. More specifically, the index represents the extent to which the distribution of any two (2) groups (racial, ethnic, etc.) differs across census tracts. While there are limitations due to outside factors and scale size, the Dissimilarity Index can provide an effective method of analyzing segregation and identifying trends in a community.

A high value indicates that the two groups tend to live in different tracts. Dissimilarity Index values between 0 and 39 generally indicate low segregation; values between 40 and 54 generally indicate moderate segregation; and values between 55 and 100 generally indicate a high level of segregation. However, context is important in interpreting the dissimilarity index. The index measures the degree two groups are segregated in a particular geographic area; however, the index alone does not provide the location of the segregation within the geographic area.

Brown University has provided New Bern's dissimilarity indices for 1980 to 2020:

Dissimilarity Index in New Bern, NC

Racial/Ethnic Dissimilarity Index	New Bern, NC				
	1980	1990	2000	2010	2020
Black/White	26.2	37.4	26.4	31.2	31.4
Hispanic/White	11.7	12.9	26.5	28.9	23.6
Asian/White	3.2	18.1	13.3	30.5	28.8
Hispanic/Black	14.5	31.5	23.7	32.0	27.1
Asian/Black	23.0	43.3	28.6	36.4	30.9
Hispanic/Asian	8.5	30.1	29.6	33.4	25.0

Source: <https://s4.ad.brown.edu/projects/diversity/index.htm>

Broadly speaking, segregation in the City of New Bern has increased among all racial groups since 1980 but the trajectory has not been uniform. For instance, for all categories except Asian/White, there is currently less segregation in 2020 than in 1990. For all categories except Black/White, 2020 has seen a decrease in segregation since 2010. There does not appear to be any major uniform trends regarding segregation in the City of New Bern.

Observations: Residential segregation is a major fair housing issue, and New Bern's housing segregation adversely affects minority populations. Segregated populations can file complaints on the basis of Race, Color, Ethnicity, or National Origin/Ancestry if they believe they are victims of housing discrimination. None of the census counts reported a dissimilarity index of more than 37.4%

K. Disabled Households

The following table includes the 2018-2022 American Community Survey estimate that shows the number of disabled individuals in the City of New Bern. The total population five (5) years and over is 30,664 and the disabled population is 4,616, or 15.1%. This is an indicator of the need for housing for the disabled who are mainly low- and moderate-income and who are usually unable to find housing resources that are accessible and/or affordable.

Disabled Persons in the City of New Bern

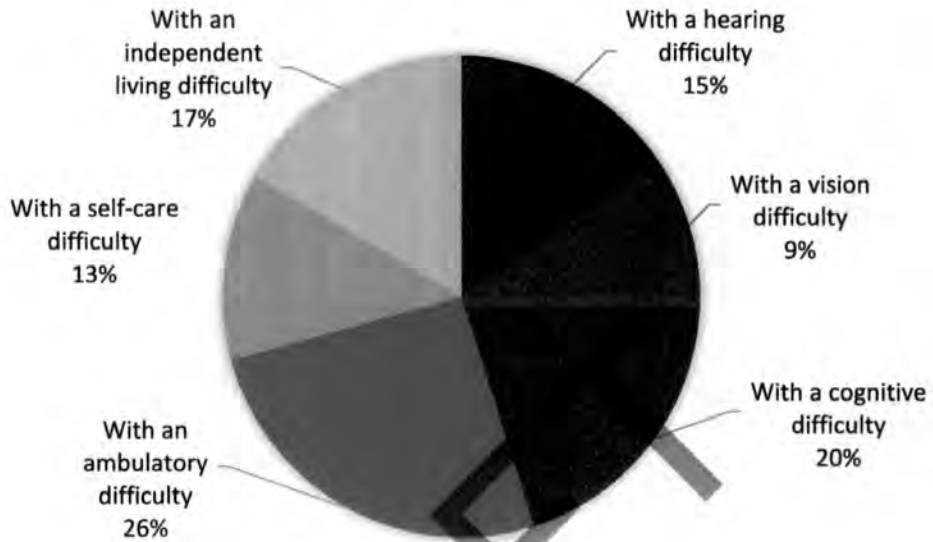
Disability Status of the Civilian Non-Institutional Population	2013-2017 ACS		2018-2022 ACS	
	#	%	#	%
Total Civilian Population	28,705	-	30,664	-
Total Population with a disability	4,958	17.3%	4,616	15.1%
Population under 5 years	0	0.0%	24	1.2%
With a hearing difficulty	0	0.0%	24	1.2%
With a vision difficulty	0	0.0%	24	1.2%
Population 5 to 17 years	266	5.6%	316	8.1%
With a hearing difficulty	11	0.2%	30	0.6%
With a vision difficulty	0	0.0%	16	0.3%
With a cognitive difficulty	255	5.4%	(18 and under) 270	5.2%
With an ambulatory difficulty	0	0.0%	(18 and under) 0	0.0%
With a self-care difficulty	27	0.6%	(18 and under) 134	2.6%
Population 18 to 64 years	2,475	28.3%	1,947	22.1%
With a hearing difficulty	421	2.5%	502	3.1%
With a vision difficulty	408	2.5%	313	1.9%
With a cognitive difficulty	1,284	7.7%	893	5.4%
With an ambulatory difficulty	1,211	7.3%	1,010	6.1%
With a self-care difficulty	556	3.4%	395	2.4%
With an independent living difficulty	812	4.9%	664	4.0%
Population 65 years and over	2,217	41.0%	2,329	33.1%
With a hearing difficulty	1,019	18.8%	846	12.0%
With a vision difficulty	511	9.5%	489	6.9%
With a cognitive difficulty	530	9.8%	660	9.4%

With an ambulatory difficulty	1,371	25.4%	1,303	18.5%
With a self-care difficulty	413	7.6%	603	8.6%
With an independent living difficulty	904	16.7%	843	12.0%
SEX				
Male	2,208	16.4%	2,130	15.0%
Female	2,750	18.1%	2,486	15.1%
RACE AND HISPANIC OR LATINO ORIGIN				
White alone	3,135	19.6%	3,025	17.6%
Black or African American alone	1,559	16.8%	1,926	13.7%
American Indian and Alaska Native alone	55	39.6%	30	17.3%
Asian alone	47	2.4%	13	0.8%
Native Hawaiian and Other Pacific Islander alone	15	100.0%	0	-
Some other race alone	50	7.7%	48	5.6%
Two or more races	97	14.1%	204	14.2%
White alone, not Hispanic or Latino	3,091	20.5%	2,966	17.9%
Hispanic or Latino (of any race)	140	7.9%	122	6.1%

Source: 2013-2017 and 2018-2022 American Community Survey

Of the population age 65 and older, 33.1% have a disability, made up largely due to ambulatory difficulty (18.5%) and an independent living difficulty (12.0%). The overall data shows a fairly even percentage between males and females, with 15.0% and 15.1% of the respective populations having disabilities.

Type of Disability for Population 5 Years and Over in the City of New Bern



Source: 2018-2022 American Community Survey

The New Bern Housing Authority recognizes the need for accessible and visitable housing units in the City. As a result, more than 5% of all public housing units are handicapped accessible.

Observations: Disability has become the most common protected class basis for fair housing complaints. Sources of these complaints are frequently the results of a landlord’s unwillingness to make reasonable modifications or accommodations. The City’s shrinking disabled population may be a result of discrimination, and an unwillingness to make these changes that is forcing disabled residents to move out of the City.

III. Review/Update to Original Plan

The "Analysis of Impediments to Fair Housing Choice" was not prepared in 2019, at the time of the last Five-Year Consolidated Plan.

DRAFT

IV. Impediments to Fair Housing 2024

To determine if any impediments to fair housing choice exist, interviews and meetings were conducted, surveys were distributed, Census data was reviewed, and an analysis of the fair housing complaints in the City of New Bern was undertaken.

A. Fair Housing Complaints

1. Fair Housing Project of Legal Aid of North Carolina

The Fair Housing Project of Legal Aid of North Carolina was established by Legal Aid of North Carolina (LANC). Its mission is as follows:

Fair Housing Project of Legal Aid of North Carolina
 224 South Dawson Street
 Raleigh, NC 15222
 (855) 797-3247
<http://www.fairhousingnc.org>

“The Fair Housing Project of Legal Aid of North Carolina works to eliminate housing discrimination and to ensure equal housing opportunity for all people through education, outreach, public policy initiatives, advocacy and enforcement.”

As part of the Fair Housing Project, LANC provides education and outreach on fair housing issues, legal advocacy for North Carolina residents who have been discriminated against in their search for housing, research into fair housing issues and predatory lending, and fair housing testing to determine possible discrimination based on race, disability, familial status, and other grounds. As part of their education and outreach initiatives, LANC provides information to vulnerable populations to increase their knowledge and awareness of fair housing rights and responsibilities.

In addition to providing education and training services, FHP is expanding outreach to increase awareness of the Fair Housing Act through public service announcements, print materials, videos, and use of social media.

2. North Carolina Human Relations Commission

The North Carolina Human Relations Commission (NCHRC) is tasked to enforce state laws that prohibit discrimination, the North Carolina Fair Employment Practices Act, and the North Carolina State Fair Housing Act. The North Carolina State Fair Housing Act was passed in 1983; the Act prohibits certain discriminatory housing practices

North Carolina Human Relations Commission
 1711 New Hope Church Road
 Raleigh, NC 27609
 (984) 236-1850
<https://www.oah.nc.gov/civil-rights-division/human-relations-commissiongov>

because of race, color, sex, religious creed, ancestry, age, or national origin and gave the NCHRC the authority to enforce the law as well as the Federal Fair Housing Act. The North Carolina State Fair Housing Act was amended in 1990 to include protections for persons with disabilities and families with children.

The NCHRC investigates employment and housing discrimination complaints on behalf of the U.S. Equal Employment Opportunity Commission (EEOC) and the U.S. Department of Housing and Urban Development (HUD), respectively. The NCHRC consists of 22 members, made up of appointments from the Governor, the Speaker of the North Carolina House of Representatives, and the President Pro Tempore of the North Carolina Senate. The Commission holds public meetings, which are open to the public, to address issues of discrimination or civil tension.

3. Fair Housing Assistance Program (FHAP) Agencies

The Federal Fair Housing Assistance Program (FHAP) offers grants to state and local agencies that have sufficiently demonstrated to HUD that they support or enforce a fair housing law that is substantially equivalent to the Fair Housing Act. Thirty-six (36) states and the District of Columbia all have at least one state or local agency serving as a FHAP. These funded FHAP agencies carryout fair housing activities such as enforcement and education in order to protect families and individuals who believe that they have been the victims of housing discrimination. The North Carolina Human Relations Commission serves as the statewide FHAP.

4. Fair Housing & Equal Opportunity (FHEO-HUD)

The U.S. Department of Housing and Urban Development’s (HUD’s) Office of Fair Housing & Equal Opportunity (FHEO) receives complaints regarding alleged violations of the Fair Housing Act. From January 1, 2014 to February 6, 2024, there were fourteen (14) Fair Housing complaints filed in Craven County, five (5) of which originated within the City of New Bern. Attached is a listing for all the FHEO Complaints received and the status or resolution of the complaint.



The fair housing complaints in the City of New Bern that were filed with HUD are disaggregated in the table below to illustrate the most common basis of complaints. In the City of New Bern during the period, disability was the most common basis for complaints and race was the second most common cause for complaint. The table below compares the frequency of each basis of complaint in the City and the County (where the County basis for complaints include the City counts).

The following table entitled “Basis for Housing Complaints” summarizes all of the complaints filed with the HUD Office of Fair Housing & Equal Opportunity between January 1, 2014 to February 6, 2024, in the City of New Bern and Craven County.

**Basis for Housing Complaints in the
City of New Bern and Craven County, 2014-2023**

Basis	City of New Bern		Craven County	
	Count*	% of City Complaints	Count*	% of County Complaints
Race	1	20.0%	3	36.21%
Color	0	-	0	-
National Origin	0	-	0	-
Religion	0	-	0	-
Sex	0	-	0	-
Disability	4	80.0%	10	53.50%
Familial Status	0	-	1	10.29%
Retaliation	0	-	2	7.41%
Total*	5	-	14	-

Source: Fair Housing Equity Office Region IV

**Note: Each complaint may include multiple bases, so the counts do not add up to the total number of complaints*

Based on the table, disability was the most common basis for complaint in both the City of New Bern and Craven County. This reflects national trends, where disability has overtaken race as the most common basis for a complaint. Disability complaints make up 80.0% of all complaints filed in the City of New Bern, and in Craven County (53.5%), while Race (20.0% in the City and 36.2% in the County) is the second-most stated basis. Familial Status and Retaliation were the third- and fourth-most common basis for complaint in the County.

The following table illustrates how complaints were closed. There were five (5) complaints filed in the City of New Bern from January 1, 2014, to February 6, 2024.

**How Complaints Were Closed
in the New Bern, North Carolina**

Basis	How Closed						
	No Cause	FHAP Judicial Consent Order or Discrimination Found	Conciliated/ Settled	FHAP Judicial Dismissal or No Discrimination Found	Complaint Withdrawn	Open	Dismissed
Race	-	-	1	-	-	-	
Familial Status	-	-	-	-	-	-	
Disability	1	-	-	-	2	-	1
National Origin	-	-	-	-	-	-	-
Retaliation	-	-	-	-	-	-	-
Color	-	-	-	-	-	-	-
Sex	-	-	-	-	-	-	-
Religion	-	-	-	-	-	-	-
Total:	1	-	1	-	2	-	1

Source: U.S. Department of HUD-FHEO, Philadelphia Regional Office

DRAFT

The following table entitled “HUD-FHEO Complaints” summarizes all of the complaints filed with the HUD Office of Fair Housing & Equal Opportunity between January 1, 2014 to February 6, 2024 in the City of New Bern.

Table IV-7 - HUD-FHEO Complaints for the City of New Bern

City	HUD Filing Date	Bases	Issues	Closure Reason
City of New Bern	06/22/16	Disability	Discriminatory terms, conditions, privileges, or services and facilities; Failure to make reasonable accommodation	Complaint withdrawn by complainant after resolution
City of New Bern	07/11/17	Disability	Discriminatory terms, conditions, privileges, or services and facilities; Failure to make reasonable accommodation	No cause determination
City of New Bern	09/04/19	Disability	Discriminatory terms, conditions, privileges, or services and facilities; Otherwise deny or make housing unavailable; Failure to make reasonable accommodation	Dismissed for lack of jurisdiction
City of New Bern	02/07/20	Race	Discriminatory financing (includes real estate transactions); Discriminatory terms, conditions, privileges, or services and facilities	Conciliation/settlement successful
City of New Bern	05/03/21	Disability	Discriminatory terms, conditions, privileges, or services and facilities; Failure to make reasonable accommodation	Complaint withdrawn by complainant after resolution

Source: U.S. Department of HUD-FHEO, Philadelphia Regional Office

National Trends:

The U.S. Department of Housing and Urban Development (HUD) funds the Office of Fair Housing and Equal Opportunity (FHEO), whose mission is to eliminate discrimination, promote economic opportunity, and achieve diversity. FHEO leads the nation in the enforcement, administration, development, and public understanding of Federal fair housing policies and laws. FHEO enforces laws that protect people from discrimination on the basis of race, color, religion, sex, national origin, disability, and familial status. FHEO releases annual reports to Congress, which provide information regarding complaints received during the particular year. The following table highlights the frequency of such housing complaints for the years between 2012 and 2022. FY 2022 is the most recent year that FHEO data was available.

Housing Complaints Nationwide

Year	FHOs	HUD	FHAP Agencies	DOJ	Total
2012	19,680	1,817	6,986	36	28,519
2013	18,932	1,881	6,496	43	27,352
2014	19,026	1,710	6,758	34	27,528
2015	19,645	1,274	6,972	46	27,937
2016	19,740	1,371	7,030	40	28,181
2017	20,595	1,311	6,896	41	28,825
2018	23,407	1,784	5,987	24	31,202
2019	21,117	1,771	5,953	39	28,880
2020	21,089	1,697	5,883	43	28,712
2021	22,674	2,093	6,413	36	31,216
2022	24,404	1,915	6,652	36	33,007

Source: National Fair Housing Alliance 2023 Fair Housing Trends Report

The housing complaints filed in the City of New Bern were based on disability and race, which are consistently the most common causes for complaints across the nation.

The following agencies provided feedback on their perception of housing-related issues in the City of New Bern. Complete summaries of meeting comments can be found in the Appendix Section.

- Legal Aid of North Carolina
- New Bern Housing Authority
- Twin Rivers Opportunities, Inc.
- United Way of Coastal Carolina
- Habitat for Humanity of Craven County

- Interfaith Refugee Ministries
- Religious Community Services
- Neuse River Community Development Corporation
- North Carolina Independent Living Regional Office
- The Salvation Army of New Bern
- Coastal Women's Shelter

The following is a summary of key points raised in the meetings.

Housing Needs:

- There is a need for more affordable housing and the development of new housing. There is not enough affordable housing that is decent, safe, sound, and sanitary.
- There is a lack of accessible housing in the City and landlords are reluctant to make reasonable accommodations.
- There is a need for additional low- and moderate- housing units for singles, families, and the elderly.
- There is a need for affordable 1-bedroom and 2-bedroom units.
- Utility bills are affecting many low-income households and follow the renters when they move, which can lead to evictions.
- Older homes in the City have lead-based paint issues.
- Home ownership barriers exist, including a lack of funding for down payment and closing costs.
- There is a significant need for weatherization services and to increasing energy efficiency, which will lower utility costs.
- Single mothers in particular struggle to find affordable housing.
- There is a need for financial literacy for low-income households.

Housing Needs for Special Populations:

- There is a need for additional housing that supports the aging in place population.
- There is a need to finance reasonable modifications and accommodations for senior housing, as they are frequently too expensive for seniors on fixed incomes to make on their own.

- There is a lack of rental housing with modifications and accommodations for the disabled, and they frequently have long waiting lists.
- Veterans often need supportive services for housing and may struggle to find affordable housing near these services.
- There is a need for housing targeted to those with mental health and behavioral health issues.
- There is a need to assist in meeting the basic needs of individuals with disabilities, or provide services nearby.

Fair Housing:

- There are segregation issues present in the region.
- Reasonable modifications and accommodations are needed, and landlords often refuse to make them.
- Residents who experience housing discrimination will often not report discrimination due to fear of retaliation.
- Public transportation does not always reach affordable housing, creating a lack of employment opportunities for these populations. This is known to affect the immigrant and refugee populations.
- There is a need to educate landlords in working with immigrant and refugee populations.
- Areas of minority concentration are also areas where the affordable housing is not decent, safe, nor sound.
- Code enforcement cannot fix the issues with mold abatement.
- Residents are concerned about being blacklisted for rentals if they speak up.

B. Public Sector

Part of the Analysis of Impediments is to examine the public policies of the jurisdiction and the impact on fair housing choice. The local government controls land use and development through its comprehensive plan, zoning regulations, subdivision regulations, and other laws and ordinances passed by the local governing body. These regulations and ordinances govern the types of housing that may be constructed, the

density of housing, and the various residential uses in a community. Local officials determine the community’s commitment to housing goals and objectives. The local policies therefore decide if fair housing is to be promoted or passively tolerated. The State of North Carolina controls zoning and it is not supportive of fair housing.

This section of the Analysis of Impediments evaluates the City’s policies to determine if there is a commitment to affirmatively further fair housing.

1. CDBG Program

The City of New Bern receives CDBG funds from HUD as an entitlement city under the program. The City receives approximately \$250,000 in CDBG funds but received \$291,714 for the 2024 Program Year. City allocates its funds to public facility improvements, public services, housing activities, etc.

In particular, the City in its FY 2024 CDBG Program proposed to allocate the CDBG funds as outlined in the table below to affirmatively further fair housing. The City of New Bern anticipates a reduction in the annual CDBG allocation in the coming years as a result of further cuts in the Federal budget.

FY 2024 CDBG Allocation for the City of New Bern

COMMUNITY DEVELOPMENT BLOCK GRANT PROGRAM (CDBG)	
Administration	\$ 58,342
Demolition/Clearance	\$ 65,000
Streets & Sidewalks	\$ 168,372
Total:	\$ 291,714

All activities listed above are undertaken in low/mod areas of the City which is a high priority of the City. Additionally, each activity meets the National Objectives of serving a low/mod area, low/mod people, job creation, or reducing slum or blight. Many activities in each funding category specifically work to increase the supply of quality affordable housing units, as well as promote fair housing choice in the City.

In its FY 2024-2028 Five Year Consolidated Plan, the City of New Bern identified several priorities for funding and addressing community needs during this five-year period:

HOUSING PRIORITY – HS:

- **HS-1 Homeownership** – Promote and assist low- and moderate-income households who wish to become homeowners by providing

down payment assistance, closing cost assistance, and requiring housing counseling training.

- **HS-2 Housing Construction** – Promote and assist in financing the development of affordable housing for both rental and for sales housing.
- **HS-3 Housing Rehabilitation** – Promote and assist in financing the preservation of existing owner and renter occupied housing stock in the City.
- **HS-4 Rent and Utility Assistance** – Promote and assist in financing short term rent and utility assistance programs for low- and moderate-income persons who are in danger of becoming homeless.

HOMELESS PRIORITY – HO:

- **HO-1 Housing** – Promote and assist in developing housing opportunities for homeless persons and households, and those who may be at-risk of becoming homeless.
- **HO-2 Operations/Support** – Promote and assist in financing support services for the homeless and persons at-risk of becoming homeless.
- **HO-3 Prevention and Rapid Re-Housing** – Promote and assist in the prevention of homelessness through anti-eviction and other programs for rapid re-housing.

SPECIAL NEEDS PRIORITY – SN:

- **SN-1 Housing** – Promote and assist to increase the supply of affordable, decent, safe, sound, and accessible housing for the elderly, persons with disabilities, persons with HIV/AIDS, victims of domestic violence, persons with alcohol/drug dependency, and persons with other special needs through rehabilitation of existing housing and new construction of accessible housing.
- **SN-2 Social Services** – Promote and assist in supporting social service programs and facilities for the elderly, persons with disabilities, persons with HIV/AIDS, victims of domestic violence, persons with alcohol/drug dependency, and persons with other special needs.
- **SN-3 Accessibility** – Promote and assist in making accessibility improvements to owner occupied housing through rehabilitation and improve renter occupied housing by promoting reasonable accommodations for the physically disabled.

COMMUNITY DEVELOPMENT PRIORITY – CD:

- **CD-1 Infrastructure** – Improve the City's infrastructure through reconstruction and new construction of streets, walks, curbs, ADA

ramps, retaining walls, sewer, water, storm water management, bridges, bike trails, green infrastructure, etc.

- **CD-2 Community Facilities** – Improve the City's parks, recreational centers, community centers, and public community facilities through rehabilitation and new construction.
- **CD-3 Public Services** – Improve and increase public service programs for the youth, the elderly, disabled, and in general, public service programs for low- and moderate-income persons.
- **CD-4 Food Programs** – Provide assistance for food and nutritional programs for low- and moderate-income persons.
- **CD-5 Public Transit** – Promote the development of additional bus routes and improve public transportation for low- and moderate-income persons.
- **CD-6 Demolition and Clearance** – Remove and eliminate slum and blighting conditions through demolition of vacant, dilapidated, and abandoned structures throughout the City.
- **CD-7 Architectural Barriers** – Remove architectural barriers and make public and community facilities accessible to persons with physically disabled.
- **CD-8 Public Safety** – Improve public safety through upgrades to facilities, purchase of new equipment, firefighting and prevention, crime prevention, community policing, and ability to respond to emergency situations.

ECONOMIC DEVELOPMENT PRIORITY – ED:

- **ED-1 Employment** – Support and encourage new job creation, job retention, workforce development, employment, and job training services for the unemployed and underemployed persons.
- **ED-2 Financial Assistance** – Support business and commercial growth through expansion and new development with technical assistance and low interest loan programs.
- **ED-3 Redevelopment Program** – Plan and promote the development and redevelopment of vacant commercial and industrial sites, and facilities, and the revitalization efforts in the Greater Five Points Redevelopment Area and other residential neighborhoods.

ADMINISTRATION, PLANNING, AND MANAGEMENT PRIORITY – APM:

- **APM-1 Overall Coordination** – Provide program management and oversight for the successful administration of Federal, state, and local funded programs, including planning services for special studies, environmental clearance, fair housing, performance evaluation,

monitoring, and compliance with all Federal, state, and local laws and regulations.

- **APM-2 Fair Housing** – Provide funds for training, education, outreach, and monitoring to affirmatively further fair housing in the City of New Bern.

2. Continuum of Care (CoC)

The City of New Bern is part of the North Carolina Balance of State Continuum of Care. This Continuum of Care was created in 2005 to allow for rural counties to apply for and administer CoC funding from HUD.

The Continuum of Care has recently shifted its focus to increase the number of permanent housing units to address unmet needs in the community. In the past year, new beds were added for small families, individuals, and large families. The City of New Bern worked with the CoC to develop a Strategic Plan to address homelessness for FY 2024-2028. This plan has the following priorities:

- **HO-1 Housing** – Promote and assist in developing housing opportunities for homeless persons and households, and those who may be at-risk of becoming homeless.
- **HO-2 Operations/Support** – Promote and assist in financing support services for the homeless and persons at-risk of becoming homeless.
- **HO-3 Prevention and Rapid Re-Housing** – Promote and assist in the prevention of homelessness through anti-eviction and other programs for rapid re-housing.

The CoC utilizes the VI-SPDAT score to assess the vulnerability of a homeless individual or family, as well as the length of time the individual or family has been homeless. Following the assessment, the CoC prioritizes the placement of chronically homeless individuals or families into permanent housing, and follows with the placement of those that are the next most at-risk based on the VI-SPDAT. Assessment also takes into account special populations including: veterans, youth, and victims fleeing domestic violence. This allows for the CoC to direct those with mental health issues, substance abuse disorders, and disabilities to permanent supportive housing that can provide them with targeted assistance. Specific outreach toward targeted groups is conducted through organizations that serve special needs populations.

Moving forward, the City will continue to consult with the Continuum of Care to determine broad funding priorities to assist homeless persons. Established CoC standards that are applicable and easily transferrable to CDBG projects and activities are used in the effort to apply a standard set of criteria for

various homeless funding programs. The City of New Bern will also work with the CoC to evaluate the outcomes of projects and activities assisted by CDBG funds.

3. **The New Bern Housing Authority and Twin Rivers Opportunities, Inc. –**

The New Bern Housing Authority (NBHA) provides programs and grants to increase housing choice and affordability within the City of New Bern. NBHA, along with the City of New Bern, has a variety of affordable housing options, including public housing and LIHTC units managed by the Housing Authority.

The Housing Authority of the City of New Bern owns and professionally manages family communities and elderly/disabled rental apartments. NBHA had one (1) public housing development: Trent Court. NBHA had a total of 218 public housing units with 110 accessible units. NBHA also owns and manages Section 8 Housing for elderly residents in New Bern Towers. There are 106 units in New Bern Towers.

NBHA has one (1) Section 8 community that is currently designated as Housing for Elderly Residents, which is New Bern Towers with 106 units. There are eight (8) disabled units in New Bern Towers. Currently, the Housing Authority of the City of New Bern does not plan to designate any additional public housing units in the housing authority inventory for occupancy only by elderly families or families with disabilities. There are 110 units in Trent Court that are accessible to the elderly and/or disabled. The Housing Authority has been working to make reasonable accommodations to its public housing units to satisfy the Section 504 requirements for persons with physical disabilities such as mobility, visual, and hearing impairments.

The NBHA recently submitted its Five-Year Plan Update for its FY 2023 through FY 2028 Public Housing Capital Fund Program Grant and submitted its complete Five-Year Plan for FY 2023-2028 in September 2022. The Capital Fund Grant award for FY 2023 was \$801,177. The NBHA proposed various activities to improve the overall living environment in New Bern Towers and the transformation plan for Trent Court.

According to the Five Year and Annual Plan for 2023-2028, NBHA's progress in meeting their mission and goals states that NBHA set the goal of cooperating with the City of New Bern and other neighborhood partners to promote neighborhood revitalization and economic development in designated areas of the City, as evidenced by the resident input in the development of the Gateway Renaissance Plan and Greater Five Points Transformation Plan. NBHA has an active Advisory Board (which includes residents) that expresses needs for both the New Bern Towers community and the public housing under the Housing Authority of the City of New Bern as a whole. Trent Court formerly had an active resident council, but Hurricane Florence caused the council to disband, and the residents of Trent Court have struggled to restore it.

Public Housing:

The New Bern Housing Authority owns and operates only one public housing community, one Section 8 property and one LIHTC property. In the Trent Court Apartments public housing community, there are a total of 218 units, of which 110 are accessible. However, Trent Court will be demolished and replaced with multi-income housing in the coming years. Housing will be provided for residents displaced by these actions. To supplement this public housing, NBHA also owns and manages a Section 8 housing community, New Bern Towers, and a LIHTC community, Carolina Avenue Apartments. There is still demand for public housing, as there are currently 164 people on the waiting list for Trent Court.

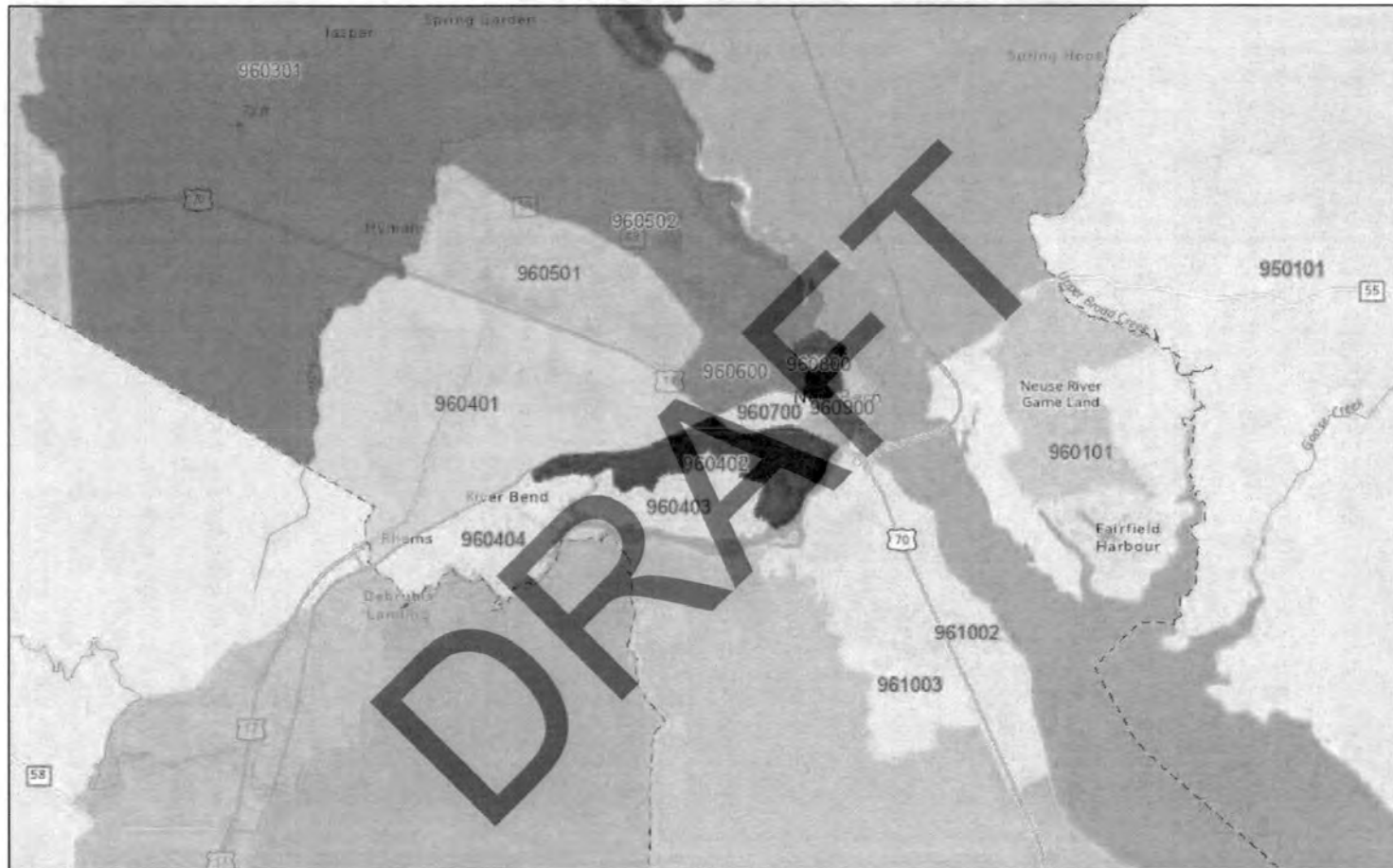
Housing Choice Vouchers:

Twin Rivers Opportunities, Inc. is the Housing Choice Voucher provider, and it is a separate entity from the Housing Authority. As of March of 2024, Twin Rivers Opportunities administers 995 Housing Choice Vouchers. There is significant demand for Housing Choice Vouchers in the City, as evidenced by there being 1,300 households on the still-open waiting list for vouchers.

Twin Rivers Opportunities, Inc. also runs the Family Self-Sufficiency (FSS) Program. The program gives Section 8 voucher holders the opportunity to set and reach goals that they set for themselves and their families, as well as save a significant amount of money. Section 8 voucher holders may also use their vouchers to realize the American dream of becoming a homeowner. Both of these opportunities are available to Section 8 holders who choose to become participants in Section 8's Family Self-Sufficiency Program. There are two parts to the program. The first part of the program is the Self-Sufficiency program where participants have the opportunity to work towards and meet goals that they set for their families as well as save money that will become theirs when they have completed their goals. The second part of the program is the Homeownership Program. In this part of the program, a Section 8 participant can choose to use his or her Section 8 voucher to assist with the purchase and payment of a home.

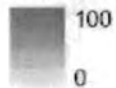
The following map highlights the locations of HUD assisted housing units and the Census Tracts where Section 8 Vouchers are most commonly used. There are Section 8 Housing Choice Voucher holders in the majority of neighborhoods in the City of New Bern and are not even necessarily located in areas with large low- and moderate-income populations. For instance, the Census Tracts labeled 960402 and 960800 both have the highest concentration of Housing Choice Vouchers, but only 960800 is determined to be a low- and moderate-income Census Tract. However, low- and moderate-income Census Tracts and Block Groups still have an overall higher concentration of Housing Choice Vouchers than those that are not considered low- and moderate-income.

Housing Choice Voucher Concentration in the City of New Bern

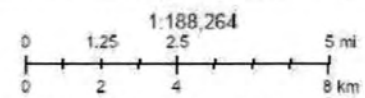


6/12/2024

Housing Choice Vouchers by Tract



World Hillshade



Esri, NASA, NOAA, USGS, Esri, TomTom, Garmin, SafeGraph, MET/NASA, USGS, EPA, NPS, USDA, USFWS

4. Low Income Housing Tax Credit –

The Low Income Housing Tax Credit (LIHTC) Program was created under the Tax Reform Act of 1986 and is intended to attract private investment to develop affordable rental housing for low- and moderate-income households. This program provides a dollar-for-dollar tax credit to reduce the developer's Federal Income Tax.

The City of New Bern promotes the use of Low Income Tax Credits. There are currently 25 LIHTC properties in the City, totaling 1,234 units for low-income households. The following table illustrates the LIHTC projects located in the City of New Bern.

City of New Bern LIHTC Projects

HUD ID Number	Project Name	Project Address	Project City	Project State	Project ZIP Code	Total Number of Units	Total Low-Income Units
CA0000X306	HIGHLANDS VILLAGE APARTMENTS	3100 CAMDEN SQUARE DRIVE	NEW BERN	NC	28562	60	60
CA0000X032	GASTON BOULEVARD	909 3RD AVENUE	NEW BERN	NC	28560	0	80
NCA19870125	LANDMARK APTS	1625 LANDMARK CIR	NEW BERN	NC	28560	32	32
NCA19890085	BRUNSWICK HOUSE II	1208 COLONY DR	NEW BERN	NC	28562		4
NCA19890325	GHENT SOUTH: LOT 12	1705 PARK AVE	NEW BERN	NC	28560	1	1
NCA19890330	GHENT SOUTH: LOT 13	1703 PARK AVE	NEW BERN	NC	28560	1	1
NCA19890335	GHENT SOUTH: LOT 9	1711 PARK AVE	NEW BERN	NC	28560	1	1
NCA19900435	OAK RIDGE APTS	3502 WIND HILL CT	NEW BERN	NC	28560	24	24
NCA19920100	BERN ST HOUSING	708 BERN ST	NEW BERN	NC	28560	1	1
NCA19929016	BERN ST HOUSING	708 BERN ST	NEW BERN	NC	28562	1	1
NCA19930140	BERN STREET HOUSING	706 BERN ST	NEW BERN	NC	28560	1	1
NCA19939020	BERN STREET HOUSING	706 BERN STREET	NEW BERN	NC	28560	1	1
NCA19960510	HUNTERS LANDING	150 HUNTER'S LANDING DRIVE	NEW BERN	NC	28562	48	48
NCA19970165	AUTUMN CHASE APTS	GREEN PARK COURT	NEW BERN	NC	28560	34	34
NCA20010180	WEATHERSTONE PARK	3800 WEATHERSTONE PARK ROAD	NEW BERN	NC	28563	44	44

NCA20060235	WYNDSOR PARK	600 WYNDSOR PARK DRIVE	NEW BERN	NC	28562	56	56
NCA20100055	CAMDEN SQUARE APARTMENTS	4800 CAMDEN SQUARE DRIVE	NEW BERN	NC	28562	76	76
NCA20141001	ASHLEY PARK APARTMENTS	4000 ASHLEY PARK DRIVE	NEW BERN	NC	28562	72	72
NCA20141005	BRUNSWICK HOUSE APARTMENTS	1210 COLONY DRIVE	NEW BERN	NC	28562	94	94
NCA20160057	CRAVEN TERRACE	601 ROUNDTREE STREET	NEW BERN	NC	28562	131	131
NCA20171009	CRAVEN TERRACE II	601 ROUNDTREE STREET	NEW BERN	NC	28560	182	188
NCA20171024	PINE VALLEY APARTMENTS	1100 PINE TREE DRIVE	NEW BERN	NC	28562	72	72
NCA20190021	TATE COMMONS	1025 KAREN DRIVE	NEW BERN	NC	28562	68	68
NCA20210008	CAROLINA AVENUE	801 CAROLINA AVENUE	NEW BERN	NC	28562	84	84
NCA20230011	PALATINE MEADOWS	4140 ACADEMIC DRIVE	NEW BERN	NC	28562	0	60

Source: <http://lihtc.huduser.org/>

5. Homeless Facilities –

The following table illustrates the existing facilities for the homeless in the City of New Bern and Region 13 of the North Carolina Balance of State Continuum of Care (Onslow, Craven, Carteret, Pamlico, and Jones County).

Homeless Facilities

Agency and Program Name	Program Capacity
Permanent Supportive Housing	
Durham VAMC	2 Unit / 2 Bed
Fayetteville VAMC	20 Units / 20 Beds
Trillium Health Resources	20 Units / 20 Beds
Rapid Rehousing	
Onslow Community Outreach	3 Units / 3 Beds
Trillium Health Resources	24 Units / 30 Beds
Williams Outreach and Consulting	7 Units / 8 Beds
Emergency Shelter	
Carteret Co. Domestic Violence Program	7 Beds
Coastal Women's Shelter (Craven)	16 Beds
Family Promise of Carteret County	14 Beds
Hope Mission (Carteret)	6 Beds
Onslow Community Outreach	44 Beds

Onslow Women's Center	8 Beds
Religious Community Services	37 Beds

Source: 2023 NC Balance of State HIC Report

6. Planning, Zoning, and Building Codes –

City of New Bern:

The City of New Bern, through its Development Services Department, regularly reviews and updates its Zoning Ordinance to ensure that it offers accurate guidance for future development within the City.

U.S. Department of Housing and Urban Development (HUD):

HUD encourages its grantees to incorporate “visitability” principles into their designs. Housing that is “visitable” has the most basic level of accessibility that enables persons with disabilities to visit the home of a friend, family member, or neighbor. “Visitable” homes have at least one accessible means of egress/ingress for each unit, and all interior and bathroom doorways have 32-inch clear openings. At a minimum, HUD grantees are required to abide by all Federal laws governing accessibility for disabled persons. The Housing Authority of the City of New Bern has stated that it is in full compliance with the HUD visitability standards. In addition, the City appears to be including the “visitability” standards in its Plan Review of new residential developments.

Federal Requirements:

Federal laws governing accessibility requirements include Section 504 of the Rehabilitation Act, the Americans with Disabilities Act, along with the Fair Housing Act.

Section 504 of the Rehabilitation Act (24 CFR Part 8), known as “Section 504” prohibits discrimination against persons with disabilities in any program receiving Federal funds. Specifically, Section 504 concerns the design and construction of housing to ensure that a portion of all housing developed with Federal funds is accessible to those with mobility, visual, and hearing impairments.

The Americans with Disabilities Act (42 U.S.C. 12131; 47 U.S.C. 155, 201, 218, and 225) (ADA) prohibits discrimination against persons with disabilities in all programs and activities sponsored by state and local governments. Specifically, ADA gives HUD jurisdiction over housing discrimination against persons with disabilities.

The Fair Housing Act was amended in 1988 to include persons with disabilities as a protected class, as well as to include design and construction requirements for housing developed with private or public funds. Specifically, this law requires

property owners to make reasonable modifications to units and/or public areas in order to allow the disabled tenant to make full use of the unit. Additionally, property owners are required to make reasonable accommodations to rules or procedures to afford a disabled tenant full use of the unit. As it relates to local zoning ordinances, the Fair Housing Act prohibits local government from making zoning or land use decisions, or implementing land use policies that exclude or discriminate against persons of a protected class.

7. Taxes

Real estate property taxes also impact housing affordability. This may not be an impediment to fair housing choice, but it does impact the affordability of housing.

The City and Craven County set the real estate taxes for the City of New Bern. The millage rates in the City are outlined below.

Real Estate Millage Rates in the City of New Bern - 2023

- County 0.056 mills
- City..... 0.038 mills

There are several tax abatements and exemptions for taxpayers in Craven County:

- **Disabled Homestead Exclusion:** Disabled County property owners with primary residences are eligible to have the property assessment value of their home reduced by \$25,000 or 50% for County tax purposes only.
- **Disabled Veteran Property Tax Homestead Exclusion:** Disabled Veteran County property owners with primary residences are eligible to have the property assessment value of their home reduced by \$25,000 or 50% for County tax purposes only.
- **Elderly Homestead Exclusion:** Residents who are at least 65 years old, have an annual income of less than \$36,700, and own and occupy their permanent residence on or before January 1st are eligible to have the property assessment value of their home reduced by \$25,000 or 50% for County tax purposes only.

8. Transportation

The Craven Area Rural Transit System (CARTS) provides public transportation to residents in and around Craven County. Public transit is important to the economic and housing development in the City and County. Many people rely on bus service to access work, school, and other services, and often utilized mass transit routes decide where people will live. The public transit system is currently facing severe budget shortages, which has resulted in drastic service cuts. Many

areas of the City have experienced reduced service, while others are losing service altogether. There are no weekend routes, making it difficult for residents who work on weekends to get to work on time. It is important to note that public transportation in the region is funded at the County level, and the budget cuts are not a result of the City's direct decision making.

The reduction in Federal and State funding for transportation has created an impediment for lower-income households who do not have private transportation to travel between high opportunity areas and the areas of concentrated poverty and race where they live. Some of the districts with the highest reliance on public transportation also lack basic amenities within walking distance.

9. Education

Education is often an important factor influencing the opportunities for where people choose to live. Many families living in the City of New Bern send their children to the Craven County Schools, especially if they cannot afford tuition to send their children to a private or parochial school. Craven County Schools serves approximately 12,400 students enrolled in 15 elementary schools, 5 middle schools, 3 traditional high schools, and 2 early college high schools (which offer associates degrees along with a high school diploma).

According to the 2018-2022 American Community Survey, 90.0% of the New Bern population age 25 years and over have at least a high school (or equivalency) education or higher, and 28.4% have a bachelor's degree or higher. These are similar to Craven County (90.9% diploma or equivalency, 25.7% bachelor's degree or higher) and statewide (89.4% and 33.9% respectively).

Two schools in the Craven County School District, Oaks Road Academy and Roger Bell Elementary School, are considered "Low Performing Schools" by the State of North Carolina. Oaks Road Academy is located within the City of New Bern and has since submitted a School Improvement Plan. Oaks Road Academy is also one of the few schools in the Craven County School District that has a predominantly Black and Hispanic student body, and this school's issues with performance may be related to unequal access to educational resources.

The policies and procedures of Craven County Schools influence residents of the City of New Bern. The City of New Bern does not have direct control over these policies, but has been an active participant in helping to mitigate unintended consequences of policies that might be detrimental to the long-term development of the City, and fair housing choice based on location.

10. Section 3

HUD's definition of Section 3 is:

Section 3 is a provision of the Housing and Urban Development Act of 1968. The purpose of Section 3 to ensure that employment and other economic opportunities generated by certain HUD financial assistance shall, to the greatest extent feasible, and consistent with existing Federal, State and local laws and regulations, be directed to low- and very low income persons, particularly those who are recipients of government assistance for housing, and to business concerns which provide economic opportunities to low- and very low-income persons.

The following is the City of New Bern's guidelines that is uses to accomplish Section 3 compliance:

- When a contract or project is put out for bid, as part of the bid-package, the advertisement contains the Section 3 information describing the requirements of Section 3 of the Housing and Urban Development Act of 1968, as amended, 12 U.S.C. 1701U (Section 3). The first three pages of this five-page document are the actual wording of Section 3, including 25 CFR Part 135. These three pages are to be read by and signed by all contractors bidding on City projects and contracts, stating that the contractor "will abide by and include in all subcontracts the requirements of Section 3 of the Housing and Urban Development Act of 1968, as amended." Page four is the "Estimated Work Force Breakdown" sheet which requires the following: total estimated positions needed; number of positions occupied by permanent employees; number of positions not occupied; and number of positions to be filled with Section 3 residents. Page four also is a signature page. Page five is the "Section 3 Business Utilization" sheet. This form asks for general contract information and requests the following: name of subcontractor; Section 3 business; address; trade/service or supply; contract amount; award date; and competitive or negotiated bid. It then asks for the total dollar amount awarded to Section 3 businesses. This form is then checked by the City's Labor Compliance Officer (DCP) to ensure that it was indeed filled out and signed by those contractors submitting bids.
- Once the contract is awarded to a contractor, a Pre-Construction Conference is then scheduled. At this conference the Labor Compliance Officer spends time going over all of the U.S. Department of Labor, U.S. Department of Housing and Urban Development, and City of New Bern regulations and requirements with the contractor. The above stated Section 3 document is given to the contractor during the conference for a

second time, and must be filled out, signed and sent to the Labor Compliance Officer with all the other documents/paperwork involved in the Pre-Construction Conference. When this form is approved the second time with the contractor, additional information (received from HUD in 2009) is covered regarding Section 3, amplifying and describing this effort in much more detail.

- Two other areas of concern are addressed during the Pre-Construction Conference: the requirement that contractors inform the Labor Compliance Officer (LCO) as to locations and times, once the work on a project begins, and a second piece that relates specifically to Section 3. Contractors are given a form with two sections to complete. The first requires the contractor to submit in writing where Section 3 "new hires" will be located and the source they were recruited from for the contract. The second section requires the contractor to confirm in writing if the crew-size for all work done on a project is sufficient and no new-hires of any kind will be needed. This is the case for a number of City construction contracts, as contractors have crews as small as two to four long time employees. This form is signed and returned to the LCO with all other requested written information for Section 3. The contractor is made aware that failure to submit all of the above will be considered non-compliance.
- Finally, in reference to the submission in writing that a sufficient crew exists and no new hires will be necessary, it is requested that contingent plans regarding the recruiting and hiring of Section 3 residents be considered.

During the preparation of this Analysis of Impediments study, no impediments or complaints were mentioned or filed based on Section 3 Requirements.

C. Private Sector

The private sector has traditionally been the greatest impediment to fair housing choice in regard to discrimination in the sale, rental or advertising of dwellings, the provision of brokerage services, or in the availability of financing for real estate purchases. The Fair Housing Act and local laws prohibit such practices as the failure to give the same terms, privileges, or information; charging different fees; steering prospective buyers or renters toward a certain area or neighborhood; or using advertising that discourages prospective buyers or renters because of race, color, religion, sex, handicap, familial status, national origin, and sexual orientation.

1. Real Estate Practices

The Neuse River Region Association of Realtors (NRRAR) is the local organization of real estate brokers operating in Craven, Jones, and Pamlico Counties. The Neuse River Region Association of Realtors has an open membership policy and does not discriminate. Members are bound by the Code of Ethics of the National Association of Realtors (NAR). This Code of Ethics obligates its members to maintain professional standards including efforts to affirmatively furthering fair housing. NRRAR has several committees, one of which is the "Equal Opportunity Committee." The primary responsibility of this committee is "to facilitate fair housing for all, promote Fair Housing Month in April, and speak at our Orientations to promote fair housing."



2. Newspaper/Magazine Advertising

Under Federal Law, no advertisement with respect to the sale or rental of a dwelling unit may indicate any preference, limitation, or discrimination because of race, color, religion, sex, handicap, familial status, or national origin. Under the Fair Housing Act Amendments, descriptions are listed in regard to the use of words, photographs, symbols or other approaches that are considered discriminatory.

Real estate advertisements were reviewed from several real estate publications and websites, including *Apartments.com*; *Rent.com*; *Zillow.com*; *Trulia.com*; and *Redfin.com*. *Zillow.com* and *Trulia.com* have direct links to fair housing guidelines. *Zillow*, *Redfin*, and *Rent.com* contained the fair housing logo on the bottom of each page. None of the advertisements contained language that prohibited occupancy by any protected class.

3. Private Financing

The Financial Institutions Reform, Recovery, and Enforcement Act of 1989 (F.I.R.R.E.A.) requires any commercial institution that makes five (5) or more home mortgage loans per year, to report all home loan activity to the Federal Reserve Bank under the Home Mortgage Disclosure Act (HMDA). The annual HMDA data can be found online at www.ffiec.gov/hmda/ and is included in Part VII, Appendix C of this Analysis of Impediments. This analysis uses 2022 HMDA data in order to relate with the Five-Year Consolidated Plan. The available data indicates that there may be discriminatory lending patterns between minority and non-minority households. The following tables provide an analysis of the HMDA data in the New Bern, NC Metropolitan Statistical Area (MSA). Data for the City of New Bern and Craven County is highlighted where possible.

The Financial Institutions Reform, Recovery, and Enforcement Act of 1989 (F.I.R.R.E.A.) requires any commercial institution that makes five (5) or more home mortgage loans, to report all home loan activity to the Federal Reserve Bank under the Home Mortgage Disclosure Act (HMDA). The annual HMDA data can be found online at www.ffiec.gov/hmda/ and is included in Part VII, Appendix C of this Analysis of Impediments. This analysis uses 2022 HMDA data to identify any discriminatory lending patterns between minority and non-minority households. The following two (2) tables provide an analysis of the HMDA data in the New Bern, NC Metropolitan Statistical Area (MSA).

The following table compares lending in Craven County to the New Bern, NC MSA. Lending in Craven County has been extracted from the MSA data based on census tract. Conventional loans in Craven County comprised 83.22% of the number of such loans in the MSA as a whole and 83.12% of the value of such loans.

HMDA Data Analysis for 2022

	Home Purchase Loans							
	FHA, FSA / RHS & VA		Conventional		Refinancing		Home Improvement Loans	
	#	\$ Amount*	#	\$ Amount*	#	\$ Amount*	#	\$ Amount*
Craven County	2,570	629,610	3,962	738,810	763	127,045	406	64,150
New Bern MSA/MD	2,828	687,610	4,761	888,815	904	151,170	904	151,170
% of metro area lending in Craven County	90.88%	91.56%	83.22%	83.12%	84.40%	84.04%	44.91%	42.44%

*Note: Amounts in thousands
Source: <https://www.ffiec.gov/hmda/>

The following table shows the conventional loan applications in **Craven County**. 6,550 of the MSA's 7,618 mortgage applications came from Craven County, which is 86.0% of applications. Nearly one half (46.6%) of the loan applications in the County were originated, while nearly a fifth (14.95%) were denied. County applicants had a slightly higher origination rate than the MSA as a whole, which had 53.36% of all loans originated, as well as 15.23% of denied applications.

Disposition of Conventional Loans

	Craven County		
	Count	% of Craven County Applications	% of Total MSA Applications
Loans Originated	3,550	54.20%	46.60%
Approved, Not Accepted	172	2.63%	2.26%
Applications Denied	942	14.38%	12.37%
Applications Withdrawn	979	14.95%	12.85%
File Closed for Incompleteness	346	5.28%	4.54%

Source: <https://www.ffiec.gov/hmda/>

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The following table outlines the disposition of conventional loans in Craven County by income level (data for only the City of New Bern is not available). Loan applications from low-income households have the highest denial rates by a large margin, while upper-income households have the lowest denial rates and highest origination rates. The percentage of loans originated and percentage of applications denied are both correlated with income, whereas the higher the income level, the more likely the application will be approved and loan originated.

Disposition of Loan Applications by Income Level in New Bern MSA – 2022

Income Level	Applications Received		Loans Originated		Applications Approved, Not Accepted		Applications Denied		Applications Withdrawn		Files Closed for Incompleteness	
	Count	% of Total	Count	% of Total Income Level	Count	% of Total Income Level	Count	% of Total Income Level	Count	% of Total Income Level	Count	% of Total Income Level
Less than 50% of MSA Median	663	9.9%	265	40.0%	19	2.9%	210	31.7%	108	16.3%	61	9.2%
50-79% of MSA Median	1,483	22.2%	784	52.9%	46	3.1%	293	19.8%	214	14.4%	88	5.9%
80-99% of MSA Median	435	6.5%	267	61.4%	14	3.2%	61	14.0%	65	14.9%	28	6.4%
100-119% of MSA Median	1,431	21.4%	870	60.8%	37	2.6%	209	14.6%	249	17.4%	66	4.6%
120% or More of MSA Median	2,670	40.0%	1,751	65.6%	63	2.4%	291	10.9%	448	16.8%	117	4.4%
Total	6,682	100.0%	3,937	58.9%	179	2.7%	1,064	15.9%	1,084	16.2%	360	5.4%

Source: <https://www.ffiec.gov/hmda/>

The following tables show the disposition of conventional loans where the race of the applicant was reported, disaggregated by minority status and income level for the New Bern MSA. The number of applications for conventional loans submitted by White applicants outnumbers minority applicants in each income level analyzed.

**Loan Disposition Rates by
Minority Status, Less than 50% of MSA Median Income**

Race/Ethnicity	Applications Received	% of Total Applications	Loans Originated	% of Received Applications by Minority Status	Applications Approved but Not Accepted	% of Received Applications by Minority Status	Applications Denied	% of Received Applications by Minority Status	Applications Withdrawn	% of Received Applications by Minority Status	Applications Closed for Incompleteness	% of Received Applications by Minority Status
American Indian or Alaska Native	11	1.7%	2	18.2%	0	0.0%	5	45.5%	4	36.4%	0	0.0%
Asian	27	4.1%	18	66.7%	1	3.7%	5	18.5%	2	7.4%	1	3.7%
Black or African American	92	13.9%	16	17.4%	0	0.0%	45	48.9%	14	15.2%	17	18.5%
Native Hawaiian or Other Pacific Islander	1	0.2%	0	0.0%	0	0.0%	1	100.0%	0	0.0%	0	0.0%
White	421	63.5%	191	45.4%	12	2.9%	121	28.7%	67	15.9%	30	7.1%
Hispanic or Latino	36	5.4%	11	30.6%	1	2.8%	14	38.9%	6	16.7%	4	11.1%
Not Hispanic or Latino	514	77.5%	216	42.0%	13	2.5%	158	30.7%	81	15.8%	46	8.9%
Total	663	100.0%	265	40.0%	19	2.9%	210	31.7%	108	16.3%	61	9.2%

Source: <https://www.ffiec.gov/hmda/>

White applicants have the highest origination rate 50% below median income. In this income category, Black and Hispanic applicants have a higher denial rate than their application rate, as do American Indian or Alaska Native applicants.

**Loan Disposition Rates by
Minority Status, 50-79% of MSA Median Income**

Race/Ethnicity	Applications Received	% of Total Applications	Loans Originated	% of Received Applications by Minority Status	Applications Approved but Not Accepted	% of Received Applications by Minority Status	Applications Denied	% of Received Applications by Minority Status	Applications Withdrawn	% of Received Applications by Minority Status	Applications Closed for Incompleteness	% of Received Applications by Minority Status
American Indian or Alaska Native	8	0.5%	4	50.0%	0	0.0%	3	37.5%	0	0.0%	1	12.5%
Asian	53	3.6%	35	66.0%	1	1.9%	9	17.0%	7	13.2%	1	1.9%
Black or African American	231	15.6%	99	42.9%	5	2.2%	67	29.0%	35	15.2%	25	10.8%
Native Hawaiian or Other Pacific Islander	2	0.1%	1	50.0%	0	0.0%	1	50.0%	0	0.0%	0	0.0%
White	958	64.6%	534	55.7%	34	3.5%	157	16.4%	172	18.0%	61	6.4%
Hispanic or Latino	72	4.9%	42	58.3%	1	1.4%	9	12.5%	19	26.4%	1	1.4%
Not Hispanic or Latino	1,152	77.7%	627	54.4%	37	3.2%	220	19.1%	187	16.2%	81	7.0%
Total	1,483	100.0%	46	3.1%	293	19.8%	293	19.8%	214	14.4%	88	5.9%

Source: <https://www.ffiec.gov/hmda/>

In this income category, Black, Asian, and Hispanic applicants have a higher denial rate than their application rate, as do American Indian or Alaska Native and Native Hawaiian or Other Pacific Islander applicants.

**Loan Disposition Rates by
Minority Status, 80-99% of MSA Median Income**

Race/Ethnicity	Applications Received	% of Total Applications	Loans Originated	% of Received Applications by Minority Status	Applications Approved but Not Accepted	% of Received Applications by Minority Status	Applications Denied	% of Received Applications by Minority Status	Applications Withdrawn	% of Received Applications by Minority Status	Applications Closed for Incompleteness	% of Received Applications by Minority Status
American Indian or Alaska Native	4	0.9%	3	75.0%	1	25.0%	0	0.0%	0	0.0%	0	0.0%
Asian	6	1.4%	1	16.7%	0	0.0%	2	33.3%	3	50.0%	0	0.0%
Black or African American	55	12.6%	29	52.7%	0	0.0%	13	23.6%	6	10.9%	7	12.7%
Native Hawaiian or Other Pacific Islander	1	0.2%	1	100.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
White	305	70.1%	199	65.2%	12	3.9%	37	12.1%	44	14.4%	13	4.3%
Hispanic or Latino	12	2.8%	6	50.0%	0	0.0%	2	16.7%	3	25.0%	1	8.3%
Not Hispanic or Latino	352	80.9%	222	63.1%	13	3.7%	47	13.4%	49	13.9%	21	6.0%
Total	435	100.0%	267	61.4%	14	3.2%	61	14.0%	65	14.9%	28	6.4%

Source: <https://www.ffiec.gov/hmda/>

In this income category, Black, Asian, and Hispanic applicants have a higher denial rate than the overall population, as do Native Hawaiian or Other Pacific Islander applicants.

**Loan Disposition Rates by
Minority Status, 100-119% of MSA Median Income**

Race/Ethnicity	Applications Received	% of Total Applications	Loans Originated	% of Received Applications by Minority Status	Applications Approved but Not Accepted	% of Received Applications by Minority Status	Applications Denied	% of Received Applications by Minority Status	Applications Withdrawn	% of Received Applications by Minority Status	Applications Closed for Incompleteness	% of Received Applications by Minority Status
American Indian or Alaska Native	5	0.3%	3	60.0%	0	0.0%	1	20.0%	1	20.0%	0	0.0%
Asian	37	2.6%	25	67.6%	1	2.7%	5	13.5%	5	13.5%	1	2.7%
Black or African American	122	8.5%	55	45.1%	3	2.5%	36	29.5%	20	16.4%	8	6.6%
Native Hawaiian or Other Pacific Islander	6	0.4%	2	33.3%	0	0.0%	2	33.3%	2	33.3%	0	0.0%
White	1,004	70.2%	648	64.5%	22	2.2%	129	12.8%	166	16.5%	39	3.9%
Hispanic or Latino	75	5.2%	42	56.0%	1	1.3%	13	17.3%	18	24.0%	1	1.3%
Not Hispanic or Latino	1,117	78.1%	696	62.3%	29	2.6%	159	14.2%	188	16.8%	45	4.0%
Total	1431	100.0%	870	60.8%	37	2.6%	209	14.6%	249	17.4%	66	4.6%

Source: <https://www.ffiec.gov/hmda/>

In this income category, Black and Hispanic applicants have a higher denial rate than the overall population, as do American Indian or Alaska Native and Native Hawaiian or Other Pacific Islander applicants.

In the table below, the number of White, non-Hispanic upper-income applicants significantly outnumbers the number of minority applicants. Of the racial/ethnic groups with more than 20 applicants in this income category, Black or African American applicants

and Hispanic applicants have a lower origination rate and a higher denial rate to white applicants. Asian applicants have a higher origination rate than white applicants but also have a higher denial rate.

**Loan Disposition Rates by
Minority Status, 120% or More of MSA Median Income**

Race/Ethnicity	Applications Received	% of Total Applications	Loans Originated	% of Received Applications by Minority Status	Applications Approved but Not Accepted	% of Received Applications by Minority Status	Applications Denied	% of Received Applications by Minority Status	Applications Withdrawn	% of Received Applications by Minority Status	Applications Closed for Incompleteness	% of Received Applications by Minority Status
American Indian or Alaska Native	15	0.6%	9	60.0%	0	0.0%	3	20.0%	1	6.7%	2	13.3%
Asian	39	1.5%	27	69.2%	1	2.6%	1	2.6%	8	20.5%	2	5.1%
Black or African American	205	7.7%	119	58.0%	7	3.4%	43	21.0%	27	13.2%	9	4.4%
Native Hawaiian or Other Pacific Islander	6	0.2%	4	66.7%	0	0.0%	1	16.7%	0	0.0%	1	16.7%
White	1,932	72.4%	1,314	68.0%	45	2.3%	179	9.3%	319	16.5%	75	3.9%
Hispanic or Latino	79	3.0%	43	54.4%	2	2.5%	14	17.7%	15	19.0%	5	6.3%
Not Hispanic or Latino	2,117	79.3%	1,429	67.5%	46	2.2%	216	10.2%	342	16.2%	84	4.0%
Total	2,670	100.0%	1,751	65.6%	63	2.4%	291	10.9%	448	16.8%	117	4.4%

Source: <https://www.ffiec.gov/hmda/>

The following offers a closer look at the denial rates of conventional loans by denial reason. The most common reason for denial of conventional loans in Craven County is credit history (38.4%), followed by debt-to-income ratio (28.2%) and collateral (12.2%). These particular reasons are especially present among applicants with lower incomes, as 31.7% of applications from applicants who earn less than 50% of the MSA Median are denied.

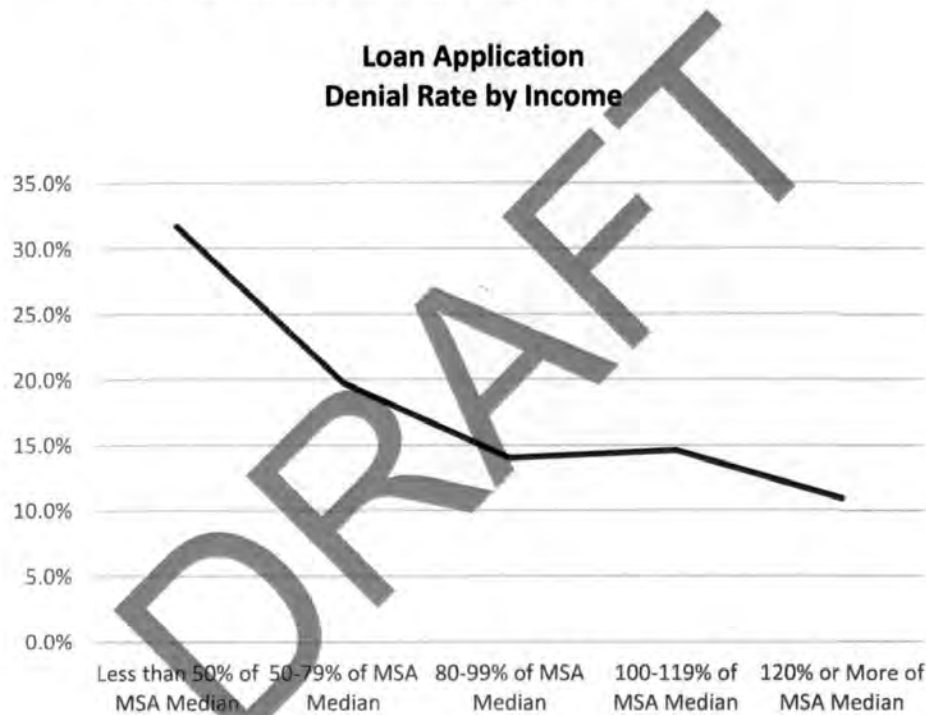
Conventional Loan Denial Rates by Denial Reason and Income Level

	Total Denials	
	Count	% of Total
Debt- to-Income Ratio	327	28.2%
Employment History	6	0.5%
Credit History	446	38.4%
Collateral	142	12.2%
Insufficient Cash	17	1.5%
Unverifiable Information	52	4.5%
Credit Application Incomplete	111	9.6%
Mortgage Insurance Denied	1	1.7%
Other	58	5.0%
Total Denials and % of Total	1,160	100.00%

Source: <https://www.ffiec.gov/hmda/>

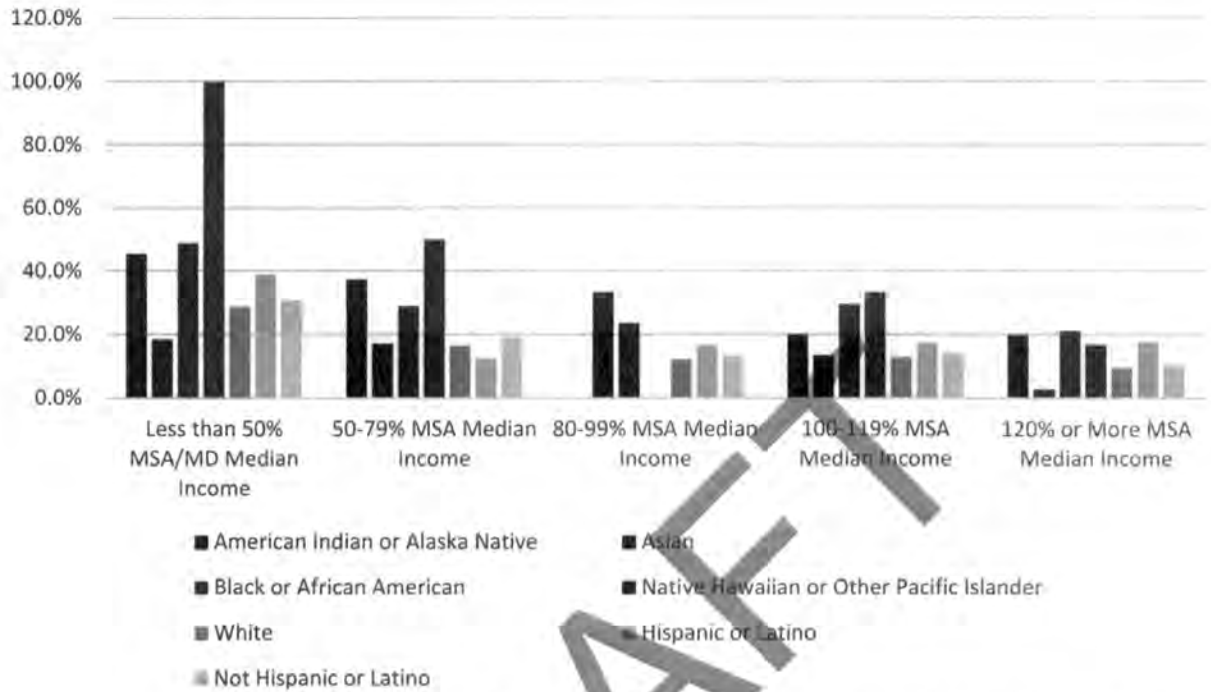
In summary, the HMDA data shows that nearly two-thirds (58.9%) of loan applications in the New Bern MSA were originated, slightly less than one-sixth (15.9%) were denied.

In the New Bern MSA, the number of white applicants exceeds the number of minority applicants. Additionally, the origination rates are higher and denial rates lower for 'White' applicants than for 'Black or African American' in every income category. As incomes decrease, denial rates increase, often due to these applicants being first-time homebuyers with little to no collateral, poor credit history, and debt. While denial rates decrease as income increases, minorities still have higher denial rates even within the same income groups.



Source: <https://www.ffiec.gov/hmda/>

Conventional Loan Application Denial Rate by Race/Ethnicity and Income Category



Source: <https://www.ffiec.gov/hmda/>

Based on an analysis of this data, there is the possibility that there may be discriminatory lending practices in the New Bern MSA, as there are disparities between the origination and denial rates of minority and non-minority households. In every income category, White applicants have a higher loan origination rate and a lower denial rate than Black or African American and Hispanic applicants. While denial rates decrease as income increases, minorities still have higher denial rates even within the same income groups.

While this data provides an insight into lending patterns in the New Bern MSA, it should be noted that data identifying race that is unique to the City level would yield more conclusive findings and provide a more accurate understanding of any existing lending issues in this City. However, this data is not available. The City should consider having an independent analysis of data prepared to determine if these are discrimination practices in lending. Loan origination rates are higher for White applicants than for minority applicants, and minority denial rates are higher than White denial rates, but the disparity in the categories of results of the applications is not as great between Whites and minorities as it is when comparing the percentage of applications.

D. Citizen Participation

The City has adopted a Citizen Participation Plan (CPP) that outlines the City's policies and procedures for obtaining public input in the planning and decision-making processes associated with the HUD grants. This process included 2 public hearings and opportunities to submit written comments on the draft plan.

A copy of the plan is currently available for review at the Development Services Department. All comments received during the public comment period will be summarized and addressed as part of the final submission of the plan. Comments received after the completion of the public comment period will still be considered by the City but may not be included in the final submission.

Comments may be sent to:

Ms. D'Aja Fulmore
 Community Development Coordinator
 City of New Bern's Development Services Department
 Economic and Community Development Office
 303 First Street, PO Box 1129, New Bern, NC 28563
 Phone: (252) 639-7586
 Fax: (252) 636-2146
 Email: fulmored@newbernnc.gov
 Website: <http://www.newbernnc.gov>

The City conducted consultations with a wide range of community stakeholders, including local social services agencies, housing providers, other City Departments, and other government agencies and offices.

Resident Survey

The City received 57 completed questionnaires.

Notable Characteristics:

Some of the notable characteristics of respondents included (as a percentage of those that answered each question):

- The majority of respondents are female at 63.2%.
- The majority (63.2%) of respondents are White.
- Over half of respondents are over the age of 60 (57.9%),
- Of those that answered the question, 25 (46.3%) are low- to moderate-income based on their family size.
- 53.7% came from two-person households.

- 73.2% are homeowners.

The following is a list of needs/issues associated with different areas of community and economic development. Values were calculated as a percentage of those that answered each question.

Housing Needs:

Some of the notable housing needs identified by respondents included problems with the following (as a percentage of those that answered each question):

- Housing Affordability - 71.2%
- Negligent Landlords - 51.9%
- Housing Options/Inventory - 42.3%
- Major Rehabilitations - 30.8%
- Historic Preservation - 28.9%
- Minor Rehabilitation - 19.1%
- ADA Accessibility - 11.5%
- Lead Paint/Pipes - 11.5%
- Asbestos - 3.9%

Parks/Recreation:

- 48.9% said they would like updated benches and picnic tables.
- 42.6% mentioned a desire for additional biking and walking trails.
- 38.3% would like improved playground equipment.
- 34.0% would like to see basketball courts.
- 23.4% would also like to see ADA Surfacing in playgrounds.
- 19.2% would like to see splash pads
- Other recreation needs included:
 - Pool programs for seniors
 - Better trash pick-up
 - Pickleball courts
 - Ice skating
 - Skateparks

Social Services:

- 76.2% of respondents do not use any social services.
- 14.3% of respondents use medical social services, and 7.1% use mental health social services.
- 4.8% of respondents use food access services.
- 4.8% of respondents use childcare services.
- 2.4% of respondents use senior services, disability services, employment services, youth services, and education/job training.

Transportation:

- 59.5% of respondents have issues with bike routes.
- 46.0% of respondents have issues with walkability.
- 40.5% of respondents have issues with the reliability of public transit.
- 35.1% of respondents have issues with the frequency of public transit.
- 24.3% of respondents have issues with the lack of parking.
- 8.1% of respondents have issues with disconnected routes.

Employment:

- 60.6% of respondents have issues with the lack of job opportunities within the City.
- 54.6% of respondents believe transportation is lacking in terms of reaching employers.
- 30.4% of respondents believe there is a lack of childcare.
- 30.3% mentioned a lack of job training.
- 18.2% of respondents see discriminatory practices and the lack of accommodations as an employment issue within the City.
- 9.1% of respondents see legal barriers as an employment issue within the City.

Reasons Fair Housing Complaints Are Not Reported:

- 63.1% of respondents believe residents do not know how to report complaints.
- 50.0% believe there is a fear of retaliation.
- 47.4% believe there is a distrust of the process.
- 29.0% believe the reporting process takes too long.

Respondents were asked to evaluate whether the following situations result in further discrimination and/or barriers to fair housing. Respondents rated the extent to which they agreed that a factor on the left contributes to housing discrimination. These are their responses:

	Yes	No	Unsure
State or Local Laws and policies that limit housing choice	33.3%	16.7%	50.0%
Lack of fair housing organizations in the City	38.7%	13.7%	47.8%
Lack of knowledge among bankers/lenders regarding fair housing	26.8%	17.7%	56.1%
Lack of knowledge among landlords and property managers regarding fair housing	47.6%	14.3%	38.1%
Lack of knowledge among residents regarding fair housing	60.5%	11.6%	27.9%
Lack of accessible housing for persons with disabilities	47.6%	7.1%	45.2%
Lack of accessibility in neighborhoods (i.e. curb cuts)	35.7%	14.3%	50.0%
Lack of fair housing education	55.8%	9.3%	34.9%
Lack of affordable housing in certain areas	65.1%	4.65%	30.2%
Concentration of subsidized housing in certain neighborhoods	66.7%	4.8%	28.6%

V. Actions and Recommendations

The following Impediments to Fair Housing Choice along with recommendations to address any impediment are presented to assist the City of New Bern to affirmatively further fair housing in the community. There previously were no identified Impediments to Fair Housing Choice. New impediments to Fair Housing Choice are presented on the pages that follow. Several ongoing impediments are present in the City of New Bern, despite the City's best efforts, and based on economic conditions, will continue to be addressed by the City of New Bern. Below is a list of impediments that were developed as part of New Bern's 2024 Analysis of Impediments to Fair Housing Choice.

A. Impediments to Fair Housing Choice

- **Impediment 1: Fair Housing Education and Outreach -**

There is a continuing need to educate persons about their rights under the Fair Housing Act and to raise community awareness to affirmatively further fair housing choice.

Goal: All residents of the City of New Bern will have an awareness and knowledge of their rights under the Fair Housing Act and the City will continue to affirmatively further fair housing, especially for low-income residents, minorities, and the disabled population.

Strategies: In order to meet this goal, the following activities and strategies should continue to be undertaken:

- **1-A:** Promote fair housing awareness through the media, seminars, and training to provide educational opportunities for all persons to learn more about their rights under the Fair Housing Act, Americans With Disabilities Act, and the Visitability Tax Credit Program.
- **1-B:** Provide and distribute literature and informational material concerning fair housing issues, an individual's housing rights, and the landlords' responsibilities to affirmatively further fair housing, including laws regarding reasonable modifications and accommodations.
- **1-C:** Support and provide funding for independent fair housing organizations to provide testing services, education, outreach, referrals, and assistance in addressing fair housing complaints that may arise in the City.

- **Impediment 2: Affordable Rental Housing -**

The City of New Bern has housing that is not necessarily affordable to lower income households. The monthly housing cost for apartments has steadily increased to the point that over 36.3% of all households in New Bern are considered cost burdened.

Goal: The development of affordable rental housing will occur throughout the City of New Bern, especially for households whose income is less than 50% AMI, through new construction, in-fill housing, the rehabilitation of vacant buildings, and the development of mixed-income housing, to reduce the number of lower income households who are cost burdened.

Strategies: In order to meet this goal, the following activities and strategies should be undertaken:

- **2-A:** Support and encourage both private developers and non-profit housing providers to develop plans for the construction of new affordable and mixed income rental housing.
- **2-B:** Support and encourage the rehabilitation of the existing housing stock and new housing in the City so it becomes decent, safe, and sound rental housing that is affordable to lower income households.
- **2-C:** Support and encourage the development of independent housing and community living arrangements for the disabled in the City.
- **2-D:** Provide financial assistance in the form of development subsidies so low-income households that are cost burdened, particularly those households whose incomes are at or below 50% AMI, are able to afford decent, safe, and sound housing.
- **2-E:** Promote partnerships with the New Bern Housing Authority and private and non-profit housing developers to construct additional Low Income Housing Tax Credit (LIHTC) multi-family, rental housing in high opportunity areas of the City.
- **2-F:** Promote Section 8 Housing Choice Voucher use throughout the City.

- **Impediment 3: Affordable Housing for Sale -**

The median value and cost to purchase a single family home in New Bern that is decent, safe, and sound, has increased significantly to over \$344,000 (2024 dollars), which limits the choice of housing for lower income households throughout the City.

Goal: Development of for-sale, single family homes for lower income households will occur through new construction, in-fill housing, and the rehabilitation of vacant structures throughout the City of New Bern.

Strategies: In order to meet this goal, the following activities and strategies should be undertaken:

- **3-A:** Support and encourage plans from both private developers and non-profit housing providers to develop and construct new affordable housing that is for sale for lower income households throughout the City of New Bern.
- **3-B:** Support homebuyer education and training programs to improve homebuyer awareness and increase the opportunities for lower-income households to become homebuyers by affirmatively furthering fair housing choice.

- **Impediment 4: Accessible Housing Units -**

As an older, built-up urban environment, there is a lack of accessible housing units and limited developable sites in the City of New Bern, since 26.4% of the City's housing units were built before 1960 and most do not contain accessibility features, and 15.1% of the City's population is classified as disabled.

Goal: The number of accessible housing units in the City will be increased through new construction and rehabilitation of existing housing units for the physically disabled and developmentally challenged population.

Strategies: In order to meet this goal, the following activities and strategies should be undertaken:

- **4-A:** Increase the amount of accessible housing through new construction of handicap units that are accessible and visitable.
- **4-B:** Continue to enforce the ADA and Fair Housing requirements for landlords to make "reasonable accommodations" to their rental properties so they become accessible to tenants who are physically disabled.
- **4-C:** Provide financial assistance to elderly homeowners in the City to make accessibility improvements to their properties in order for these residents to remain in their own homes.

- **Impediment 5: Private Lending Practices -**

The HMDA data indicates that there may be a disparity between the approval rates of home mortgage loans originated from minorities and those originated from non-minority applicants.

Goal: Approval rates for all originated home mortgage loans will be fair, unbiased and equal, regardless of race, familial status, and location.

Strategies: In order to meet this goal, the following activities and strategies should be undertaken:

- **5-A:** The City should consider using Federal and State funding to provide housing or credit counseling to potential low- and moderate-income homebuyers in impacted neighborhoods to decrease the number of denials due to poor credit, debt to income ratios, or incomplete applications.
- **5-B:** The City should consider entering into an agreement with Legal Aid of North Carolina to perform testing to determine if any patterns of discrimination are present in home mortgage lending practices for minorities and other protected classes when they wish to purchase properties located in impacted areas of the City.
- **5-C:** The City should consider using Federal and State funding to provide a higher rate of public financial assistance to potential homebuyers in impacted neighborhoods to improve the loan to value ratio, so that private lenders will increase the number of loans made in these areas.

- **Impediment 6: Economic Issues Affect Housing Choice -**

There is a need to increase economic opportunities in the City to improve household income so lower income households have the ability to live outside areas with concentrations of low-income, which makes this a fair housing concern.

Goal: The local economy will provide new job opportunities, which will increase household income, and will promote fair housing choice throughout the City of New Bern.

Strategies: In order to meet this goal, the following activities and strategies should be undertaken:

- **6-A:** Strengthen partnerships and program delivery to enhance the City's business base, expand its tax base, and create a more sustainable economy for all residents and businesses.
- **6-B:** Support and enhance workforce development and skills training that will result in a "livable" wage and increase job opportunities.

DRAFT

VI. Certification

Signature Page:

I hereby certify that this FY 2024 Analysis of Impediments to Fair Housing Choice is in compliance with the intent and directives of the Community Development Block Grant Program regulations.

Mayor Jeffrey T. Odham

Date

DRAFT

AGENDA ITEM COVER SHEET



Agenda Item Title:

Consider adopting an ordinance to amend the 2017 Roadway Improvements Project Fund

Date of Meeting: 6/25/2024	Ward # if applicable:
Department: Finance	Person Submitting Item: Kimberly Ostrom
Call for Public Hearing: <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	Date of Public Hearing:

Explanation of Item:	This ordinance amends the 2017 Roadway Improvements Project Fund.
Actions Needed by Board:	Adopt ordinance amendment
Backup Attached:	Memo; Ordinance
Is item time sensitive? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	

Cost of Agenda Item:
If this requires an expenditure, has it been budgeted and are funds available and certified by the Finance Director? <input type="checkbox"/> Yes <input type="checkbox"/> No

Additional Notes:

Aldermen

Rick Prill
Hazel B. Royal
Robert V. Aster
Johnnie Ray Kinsey
Barbara J. Best
Robert Brinson, Jr.



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New Bern, NC 28563-1129
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Jeffrey T. Odham
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Foster Hughes
City Manager
Brenda E. Blanco
City Clerk
Kimberly A. Ostrom
Director of Finance

TO: City Manager, Honorable Mayor and Members of the Board of Aldermen
FROM: Kim Ostrom - Director of Finance
DATE: June 14, 2024
RE: Amendment to 2017 Roadway Improvements Fund

Current

The 2017 Roadway Improvements Fund was established on July 11, 2017 for infrastructure improvements to various roadways throughout the city. For clarification, this ordinance would rename the fund as the Roadway Improvements Fund.

The Roadway Improvements Fund will be amended to transfer two paving projects currently appropriated in the General Fund budget:

1. Walt Bellamy & Bern Street Paving
2. Country Club Road Paving

The projects will be funded with a transfer from General Fund in the amount of \$245,058.

Requested Action

It is requested that the Board considers adopting the enclosed budget amendment at its meeting on June 11, 2024.

**AN ORDINANCE TO AMEND THE
2017 ROADWAY IMPROVEMENTS PROJECT FUND**

WHEREAS, on July 11, 2017, the Board adopted a capital project ordinance to establish the 2017 Roadway Improvements Project, which was amended several times in subsequent years for additional roadway improvements.

NOW, THEREFORE, BE IT ORDAINED by the Governing Board of the City of New Bern:

Section 1: That Section 1 of the Ordinance adopted on July 11, 2017 is hereby amended to rename the fund as the Roadway Improvements Project Fund. The project authorized is the improvements of roadways.

Section 2: That Section 3 of the Ordinance adopted on July 11, 2017 is amended to increase the appropriations:

Roadway Improvements	\$ 245,058
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Section 3: That Section 4 of the Ordinance adopted on July 11, 2017 is amended to increase the revenues:

Transfer from General Fund	\$ 245,058
----------------------------	------------

Section 4: That this resolution shall take effect upon adoption.

ADOPTED, THIS THE 25th DAY OF JUNE, 2024.

JEFFREY T. ODHAM, MAYOR

BRENDA E. BLANCO, CITY CLERK

AGENDA ITEM COVER SHEET

Agenda Item Title:

Consider adopting an amendment to the FY 2023-24 annual adopted budget

Date of Meeting: 6/25/2024	Ward # if applicable:
Department: Finance	Person Submitting Item: Kim Ostrom, Director of Finance
Call for Public Hearing: <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	Date of Public Hearing:

Explanation of Item:	Amendment to the FY 2023-24 annual adopted budget
Actions Needed by Board:	Adopt ordinance amendment
Backup Attached:	Memo; Ordinance Amendment
Is item time sensitive? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	

Cost of Agenda Item:
If this requires an expenditure, has it been budgeted and are funds available and certified by the Finance Director? <input type="checkbox"/> Yes <input type="checkbox"/> No

Additional Notes:



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CITY OF NEW BERN

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TO: City Manager, Honorable Mayor, and Members of the Board of Aldermen
FROM: Kim Ostrom - Director of Finance
DATE: June 14, 2024
RE: Amendments to the FY 2023-24 Operating Budget

Current

This budget ordinance allows for the budget amendments for Fiscal Year 2023-24 to ensure all projected expenditures have sufficient budget and to realign the revenues to equal the appropriations. The General, Electric, and Employees' Benefit Insurance Funds are amended to meet projected annual year-end revenues and costs. The amendment to the General Fund also includes an increase to the New Bern Firemen's Museum utilities reimbursement account under Public Buildings in the amount of \$1,100.

Requested Action

It is requested that the Board consider adopting the attached budget amendment at its meeting on June 25, 2024.

CITY OF NEW BERN, NORTH CAROLINA
REQUESTED AMENDMENT TO
Fiscal Year 2023-2024

FROM: Kim Ostrom, Director of Finance

Meeting Date: 6/25/2024

EXPLANATION:

This budget ordinance allows for the budget amendments for Fiscal Year 2023-24 to ensure all projected expenditures have sufficient budget and to realign the revenues to equal the appropriations. The General, Electric, and Employees' Benefit Insurance Funds are amended to meet projected annual year-end revenues and costs. The amendment to the General Fund also includes an increase to the New Bern Firemen's Museum utilities reimbursement account under Public Buildings in the amount of \$1,100.

BE IT ORDAINED BY THE BOARD OF ALDERMEN OF THE CITY OF NEW BERN
THAT THE 2023-2024 ANNUAL BUDGET ORDINANCE IS AMENDED AS FOLLOWS:

Section 1 - Appropriations

Schedule A - GENERAL FUND

General Government	\$	(43,000)
Finance		40,000
Human Resources		(65,000)
Police		302,000
Fire		515,000
Parks & Recreation		43,000
Development Services		2,000
Public Works		(125,000)
Transfer to Other Funds		5,700
	\$	<u>674,700</u>

Schedule E - ELECTRIC FUND

Increase: Distribution O & M	\$	754,000
Electric Power Production		948,000
Decrease: Electric Administration		(550,000)
Utility Business Office		(18,000)
Customer and Payment Services		(170,000)
Interfund Reimbursements		(160,000)
	\$	<u>804,000</u>

Schedule G - EMPLOYEES' BENEFIT INSURANCE FUND

Increase: Employee Benefits		
Health Insurance Claims	\$	2,500,000
Transfer to OPEB		100,000
Decrease: Workers Comp Claims		(100,000)
	\$	<u>2,500,000</u>

Section 2 - Estimated Revenues

Schedule A - GENERAL FUND

Increase: Parks & Recreation	45,000
Development Services	\$ 250,000
Public Works	70,000
Fund Balance Appropriated	309,700
	<u>\$ 674,700</u>

Schedule E - ELECTRIC FUND

Increase: Fund Balance Appropriated	\$ 3,864,000
Decrease: Electric Revenues	(3,060,000)
	<u>\$ 804,000</u>

Schedule G - EMPLOYEES' BENEFIT INSURANCE FUND

Increase: Employee Benefits Revenues	\$ 2,032,000
Fund Balance Appropriated	468,000
	<u>\$ 2,500,000</u>

NATURE OF TRANSACTION:

- ADDITIONAL REVENUE AVAILABLE FOR APPROPRIATION
- TRANSFER WITHIN ACCOUNTS OF SAME FUND
- OTHER: Appropriate Fund Balance

APPROVED BY THE BOARD OF ALDERMEN AND
ENTERED ON MINUTES DATED JUNE 25, 2024
AGENDA ITEM NUMBER _____

BRENDA E. BLANCO, CITY CLERK



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Kimberly A. Ostrom
Director of Finance

Memorandum

TO: Alderman Johnnie Ray Kinsey

FROM: Brenda Blanco, City Clerk

DATE: May 8, 2024

SUBJECT: Appointment to Board of Adjustment

George "Eric" Jones has resigned from the Board of Adjustment due to scheduling conflicts. A new appointment is needed to fill the remainder of his term which expires on June 30, 2025.

Aldermen

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Director of Finance

MEMO TO: Mayor and Board of Aldermen
FROM: Brenda Blanco, City Clerk
DATE: May 31, 2024
SUBJECT: Various Appointments Expiring June 30, 2024

Attached please find a listing of several appointments that will expire on June 30, 2024. The list provides information as to whether current appointees are eligible for reappointment and, if so, whether they are interested in continuing to serve.

Applications of interest have been circulated by email. When considering an applicant, please keep in mind the desired qualifications or background for serving on each respective board or commission.

/beb

Updated 06/19/24

	Eligible for Reappt?	Interested in Reappt	Phone	Appointing Authority
Board of Adjustment – Terms Expiring 06/30/24				
James “Trey” Ferguson	Yes	Yes	919-995-2946	Ward 1
Tim Tabak	Yes	Yes	252-636-9484	Ward 3
Bike & Ped – Term Expiring 07/10/24				
Bill Sadler	Yes	No	252-635-0866	Anyone
Community Development & Advisory Committee – Terms Expiring 06/30/24 See Note Below**				
Corinne Corr		No		Ward 1
Carol Williams				Ward 2
Marshall Williams				Ward 3
Vernon Guion				Ward 4
James Woods, Jr.				Ward 5
Della Wally				Ward 6
HPC – Terms Expiring 06/30/24				
Marc Wartner	Yes	Yes	252-349-2001	Ward 4
Jim Morrison Reapptd 6/11/25	Yes	Yes	252-256-0062	Ward 6
Candace Sullivan	Yes	No	252-670-1032	Ward 1 rotation
P&Z – Terms Expiring 06/30/24				
Margie Dunn	No	N/A		Ward 2
Gaspar “Sonny” Aluzzo	No	N/A		Ward 3
Police Civil Service Board – Terms Expiring 06/30/24 Appointments made 6/11/24; no further action needed				
Tyrone Brown	No	N/A		Anyone
Amy James	No	N/A		Anyone

Requirements / Preferences for Appointment

Board of Adjustment: The Board meets at 5:30 p.m. on the last Monday of each month, unless the date is changed due to an observed holiday. The meetings are held in the City Hall courtroom.

The Board of Adjustment consists of 7 regular members and 2 alternates. Regular members participate in and vote on all issues. Alternate members shall only serve in the absence of regular members. The 2 alternates and 6 regular members are appointed by the Board of Aldermen and must reside in the city limits; 1 regular member is appointed by

Updated 06/19/24

and must reside in the ETJ area. Terms are 3 years. It is recommended members have backgrounds related to real estate, development, construction, etc.

Police Civil Service Board: Two-year terms; members are ineligible to serve a consecutive term. The Board meets on an as-needed basis to hear appeals of sworn officers. It is recommended members have a background in law enforcement or human resources. Anyone who is a member of the NBPD or has served or volunteered with the NBPD within the last 3 years is ineligible for appointment.

Aldermen

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MEMO TO: Mayor and Board of Aldermen
FROM: Brenda Blanco, City Clerk
DATE: June 21, 2024
SUBJECT: Vacancy on MSD Advisory Commission

Chris Hoveland has resigned from the MSD Advisory Commission following his sale of The Chelsea. Mr. Hoveland represented the restaurant category. A new appointment is needed to fill the remainder of his term that will expire on December 11, 2024. Applications from qualified candidates have been provided to you by e-mail.