LOWELL HOUSING AUTHORITY
Proposed Annual Plan for Fiscal Year 2026
For State-Aided Public Housing

The Annual Plan is a document compiled by housing authority staff in advance of each new fiscal year. The plan serves as both a tool for the Local Housing Authority (LHA) to reflect upon the prior fiscal year, and as an opportunity to develop a clear and transparent plan that builds on successes, identifies needs, and corrects any issues that have arisen in prior years. Additionally, the Annual Plan is an important tool for tenants, who may use the document to better understand the operations and needs of their housing authority, advocate for changes to policies and procedures, access data about the housing authority, and participate in their housing authority's governance.

In addition to the physical document, the Annual Plan is also a process of public engagement. Throughout the Annual Plan process, the LHA executive director or their designee will be expected to review the Plan with any Local Tenant Organizations (LTO's) and Resident Advisory Board (RAB) before the LHA presents the plan to the LHA Board of Commissioners; make a draft available for review to all residents and the general public; post on the website and make a copy available to each LTO at least 30 business days before the public hearing; hold a hearing on the document; and collect, integrate, and report back on substantive comments. Additionally, the Board will read, offer recommendations, and approve the Annual Plan in advance of its submission to EOHLC.

The law that mandates the Annual Plan is An Act Relative to Local Housing Authorities, Massachusetts General Laws, Chapter 121B Section 28A. The regulation that expands upon Section 28A is 760 CMR 4.16. The regulations that address Local Tenant Organization (LTO) and resident participation in the Annual Plan are 760 CMR 6.09 (3)(h) and 760 CMR 6.09(4)(a)(4).

The LOWELL HOUSING AUTHORITY's Annual Plan for their 2026 fiscal year includes the following components:

1. Overview and Certification
2. Capital Improvement Plan (CIP)
3. Maintenance and Repair Plan
4. Operating Budget
5. Narrative responses to Performance Management Review (PMR) findings
6. Policies
7. Waivers
8. Glossary
9. Other Elements, which may include:
    a. Approval documents and any Public Comments
    b. Tenant Satisfaction Survey
    c. Performant Management Review report
    d. Other documents added by LHA

State-Aided Public Housing Developments

The following table identifies the state-aided public housing units with developments of more than 8 units listed separately. Units in developments of 8 or fewer units are aggregated as noted. Units that the LHA provides to assist clients of the Department of Mental Health (DMH), the Department of Developmental Services (DDS), or other agencies are also aggregated separately.

Dev No	Type	Development Name	Num Bldgs	Year Built	Dwelling Units
705-01	Family	Scattered Site Family	11	1920	23
705-03	Family	Walker / Lane / Liberty	3	1986	32
667-C1	Elderly	572-610 Lakeview Avenue	3	1958	21
667-C2	Elderly	129-151 Lakeview Avenue	1	1958	12
667-C3	Elderly	237-251 Pleasant/460-480 Concord	2	1958	16
667-C4	Elderly	182-210 Hale St.	2	1958	15
	Elderly	Elderly Elderly units in smaller developments	1		4
	Other	Other Special Occupancy units	2		15
Total			25		138

Massachusetts Rental Voucher Program (MRVP)

The Massachusetts Rental Voucher Program (MRVP) is a state-funded program that provides rental subsidies to low-income families and individuals. In most cases, a “mobile” voucher is issued to the household, which is valid for any market-rate housing unit that meets the standards of the state sanitary code and program rent limitations. In some cases, vouchers are “project-based” into a specific housing development; such vouchers remain at the development if the tenant decides to move out.

LOWELL HOUSING AUTHORITY manages 220 MRVP vouchers.

Federally Assisted Developments

LOWELL HOUSING AUTHORITY also manages Federally-assisted public housing developments and/or federal rental subsidy vouchers serving 3068 households.

LHA Central Office

LOWELL HOUSING AUTHORITY
350 Moody Street, P.O. Box 60 Lowell, MA 01853

Tha Chhan, Executive Director
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LHA Board of Commissioners

	Role	Category	From	To
Rodney Elliott	Chair	State Appointee	01/15/2025	01/14/2030
Matthew Marr	Member	Labor Appointee	03/01/2023	12/31/2028
Joanie Bernes	Member	Federal Tenant Rep	12/22/2020	12/28/2025
William Samaras	Vice Chair		05/21/2024	05/21/2029
Mony Var	Member		07/01/2023	06/30/2028

Plan History

The following required actions have taken place on the dates indicated.

REQUIREMENT		DATE COMPLETED
A.	Advertise the public hearing on the LHA website.	4/14/2025
B.	Advertise the public hearing in public postings.	4/14/2025
C.	Notify all LTOs or RAB (if there is one) of the hearing and provide access to the Proposed Annual Plan.	N/A
D.	Post draft AP for tenant and public viewing.	4/14/2025
E.	Hold quarterly meeting with LTO or RAB to review the draft AP. (Must occur before the LHA Board reviews the Annual Plan.)	N/A
F.	Annual Plan Hearing. Hosted by the LHA Board, with a quorum of members present. (For Boston, the Administrator will host the hearing.)	6/11/2025
G.	Executive Director presents the Annual Plan to the Board.	6/11/2025
H.	Board votes to approve the AP. (For Boston Housing Authority, the Administrator approves and submits the AP.)	6/11/2025

Certification

CERTIFICATION OF LHA USER AUTHORIZATION FOR EOHLC CAPITAL SOFTWARE AND HOUSING APPLICATIONS

I, Tha Chhan, Executive Directorof the LOWELL HOUSING AUTHORITY, certify on behalf of the Housing Authority that I have conducted an annual review of all LOWELL HOUSING AUTHORITY users of EOHLC Capital Software applications and Housing Applications and that all current LHA users are authorized to use the systems and have the appropriate level of user access based on their job responsibility. I approve all system access and access levels for all LOWELL HOUSING AUTHORITY users.

This certification applies to the following applications:

- Capital Planning System (CPS)
- Consolidated Information Management System (CIMS)
- Cap Hub
- EOHLC Housing Management Systems
- CHAMP

CERTIFICATION FOR SUBMISSION OF THE ANNUAL PLAN

I, Tha Chhan, Executive Director of the LOWELL HOUSING AUTHORITY, certify on behalf of the Housing Authority that: a) the above actions all took place on the dates listed above; b) all facts and information contained in this Annual Plan are true, correct and complete to the best of my knowledge and belief and c) that the Annual Plan was prepared in accordance with and meets the requirements of the regulations at 760 CMR 4.16 and 6.09.

The Board and Executive Director further certify that LHA operations and all LHA Board-adopted policies are in accordance with M.G.L. c. 121B and all Massachusetts state-aided public housing regulations, including, but not limited to 760 CMR 4.00; 5.00; 6.00; 8.00; and 11:00, as well as adhere to Department-promulgated guidance.

Date of certification: 7/15/2025

The Executive Office of Housing and Livable Communities (EOHLC) completed its review of this Annual Plan (AP) on . Review comments have been inserted into the plan.

Capital Improvement Plan

EOHLC Description of CIPs:

The Capital Improvement Plan (CIP) is a five year plan which identifies capital projects, provides a planning scope, schedule and budget for each capital project and identifies options for financing and implementing the plan. The CIP identifies anticipated spending for each Department of Housing and Community Development (EOHLC) fiscal year (July 1 to June 30) based on the project schedules.

Local Housing Authorities (LHAs) receive yearly awards from EOHLC (Formula Funding Awards) which they target to their most urgent capital needs in their CIP. They may also receive special awards from EOHLC for specific projects which meet specific criteria. Special awards may be given for certain emergency, regulation compliance, energy and water conservation, and other projects. The first three years of the CIP are based on actual awards made to the LHA, while years four and five are based on estimated planning amounts, not actual awards.

LHAs may sometimes secure other sources of funding and assistance that you will note in their CIP, such as: Community Preservation Act (CPA) funding, Community Development Block Grant (CDBG) funding, Local Affordable Housing Trust Funds (AHTF), HOME grants, income from leasing a cell tower on their property, savings from net meter credit contracts with solar developers, utility rebates and contracted work from utility providers, and Sheriff's Department work crews. However, not all of these funding sources are available every year, or in all communities.

The CIP includes the following parts:

- A table of available funding sources and amounts
- A list of planned capital projects showing spending per fiscal year
- A table showing special awards and other funding for targeted projects, if any, which supplements Formula Funding awarded to the LHA
  A 'narrative' with a variety of additional information.

Capital Improvement Plan (CIP)

Aggregate Funding Available for Projects in the First Three Years of the CIP:

Category of Funds	Allocation	Planned Spending	Description
Balance of Formula Funding (FF)	$1,130,342.44		Total of all FF awards minus prior FF spending
LHA Emergency Reserve	$113,034.24		Amount to reserve for emergencies
Net FF Funds (First 3 Years of the CIP)	$1,017,308.20	$1,380,415.45	Funds to plan & amount actually planned in the first 3 years of the CIP
ADA Set-aside	$4,479.23	$5,000.00	Accessibility projects
DMH Set-aside	$9,881.21	$10,000.00	Dept. of Mental Health facility
DDS Set-aside	$0.00	$0.00	Dept. of Developmental Services facility
Unrestricted Formula Funding (FF)	$1,002,947.75	$1,365,415.45	Funds awarded by DHCD to be used on projects selected by the LHA and approved by DHCD.
Special DHCD Funding	$2,059,605.50	$2,021,005.50	Targeted awards from DHCD
Community Development Block Grant (CDBG) Funds	$0.00	$0.00	Federal funds awarded by a city or town for specific projects.
Community Preservation Act (CPA) Funds	$0.00	$0.00	Community Preservation Act funds awarded by a city of town for specific projects.
Operating Reserve(OR) Funds	$0.00	$0.00	Funds from the LHA's operating budget.
Other Funds	$0.00	$0.00	Funds other than those in the above categories. See explanation below.
Total funds and planned spending	$3,076,913.69	$3,401,420.95	Total of all anticipated funding available for planned projects and the total of planned spending.

Capital Improvement Plan (CIP)

CIP Definitions:

ADA Set-aside is funding allocated within the Formula Funding (FF) for use on projects that improve accessibility for people with disabilities. 10% of FF awards are designated for this purpose.

Available State Bond Funding is the amount of State Bond Funding available to the LHA for the first three years of the CIP. It is calculated by totaling all of FF and Special Awards granted to the LHA through the end of the third year of the plan and subtracting the amount of these funds spent prior to July 1 of the first year of the plan.

Amount spent prior to the plan is the total amount of Formula Funding (FF) and Special Awards spent prior to July 1 of the first year of the plan.

Capital project is a project that adds significant value to an asset or replaces building systems or components. Project cost must be greater than $1000.

CDBG stands for Community Development Block Grant, a potential source of project funds.

CPA stands for Community Preservation Act, a potential source of project funds.

CapHub Project Number is the number given to projects entered into DHCD's project management system known as CapHub.

DMH Set-aside is funding allocated within the Formula Funding (FF) for use on facilities leased to the Department of Mental Health (DMH) program vendors, if any exist at this LHA.

DDS Set-aside is funding allocated within the Formula Funding (FF) for use on facilities leased to the Department of Developmental Services (DDS) program vendors, if any exist at this LHA.

Formula Funding (FF) is an allocation of state bond funds to each LHA according to the condition (needs) of its portfolio in comparison to the entire state-aided public housing portfolio.

Operating Reserve is an account, funded from the LHA operating budget, primarily used for unexpected operating costs, including certain extraordinary maintenance or capital projects.

Other Funds could include other funding by the city or town or from other sources.

Special Awards are DHCD awards targeted to specific projects. Award programs include funds for emergencies beyond what an LHA can fund, for complying with regulatory requirements, for projects that will save water or energy use, and various other programs the department may run from time to time.

Total Cost is the sum of investigation, design, administration, permitting, and construction costs for a project

Unrestricted Formula Funding (FF) is money awarded to the LHA by DHCD under the Formula Funding program other than amounts set aside (restricted) for accessibility improvements or for facilities operated by DMH or DDS.

Capital Improvement Plan (CIP)

Formula Funding and Special DHCD Award Planned Spending - Other funding not included

Cap Hub Project Number	Project Name	Development(s)	Total Cost	Amount Spent Prior to Plan	Remaining Planned for 2025	fy2026 Planned	fy2027	fy2028	fy2029	fy2030
160095	ARPA FF & FF: Walker - Roof and decking replacement	Walker / Lane / Liberty	$0	$0	$0	$0	$0	$0	$0	$0
160099	2nd Floor Bathroom Updates	COLONIAL AVENUE Congregate 689-01	$47,375	$43,680	$0	$0	$0	$0	$0	$0
160100	Siding Replacement & Blown-In Insulation	Scattered Site Family 705-01	$0	$0	$0	$0	$0	$0	$0	$0
160103	FF:Federalization of Dublin Street	Dublin Street 705-02	$604,627	$577,731	$0	$0	$0	$0	$0	$0
160105	ModPHASE 2020 Lowell MtW: K&B Mod, Sitework, Accessible Unit	Lakeview Avenue 667-C1	$3,506,542	$1,954,203	$0	$0	$0	$0	$0	$0
160106	Paving and landscaping improvements	Hale St. 667-C4	$428,589	$520	$0	$0	$416,645	$0	$0	$0
160108	Roof and site drainage	Scattered Site Family 705-01	$73,900	$2,300	$0	$4,260	$64,216	$0	$0	$0
160113	Replace Roof at Pleasant Street & Lakeview Ave - SUST FY22	Pleasant/ Concord 667-C3	$188,050	$11,400	$0	$53,733	$0	$0	$0	$0
160115	Replacement of siding, window, and roof	Scattered Site Family 705-01	$349,220	$17,719	$0	$97,151	$0	$0	$0	$0

Capital Improvement Plan (CIP)

Formula Funding and Special DHCD Award Planned Spending - Other funding not included

Cap Hub Project Number	Project Name	Development(s)	Total Cost	Amount Spent Prior to Plan	Remaining Planned for 2025	fy2026 Planned	fy2027	fy2028	fy2029	fy2030
160119	ARPA FF: Building Envelope Upgrade & ASHP Install	Walker / Lane / Liberty 705-03	$294,453	$0	$0	$9,916	$0	$0	$0	$0
•	AIP: 667 Routine Turnovers (160120)	LIBERTY STREET 667-05	$0	$0	$0	$0	$0	$0	$0	$0
•	AIP: 667 Routine Turnovers (160120)	Lakeview Avenue 667-C1	$0	$0	$0	$0	$0	$0	$0	$0
•	Electrical Upgrades	Lakeview Avenue 667-C2	$248,050	$0	$0	$0	$248,050	$0	$0	$0
•	AIP: 667 Routine Turnovers (160120)	Lakeview Avenue 667-C2	$0	$0	$0	$0	$0	$0	$0	$0
•	Pleasant St - Kitchen & Bath Modernization	Pleasant/ Concord 667-C3	$315,117	$0	$0	$150,268	$164,850	$0	$0	$0
•	Concord St - Kitchen & Bath Modernization	Pleasant/ Concord 667-C3	$320,644	$0	$0	$0	$0	$152,904	$167,741	$0
•	AIP: 667 Routine Turnovers (160120)	Pleasant/ Concord 667-C3	$0	$0	$0	$0	$0	$0	$0	$0
•	AIP: 667 Routine Turnovers (160120)	Hale St. 667-C4	$0	$0	$0	$0	$0	$0	$0	$0
•	Electrical Equipment Replacement	GARLAND HOUSE 689-02	$13,848	$0	$0	$0	$0	$13,848	$0	$0

Capital Improvement Plan (CIP)

Formula Funding and Special DHCD Award Planned Spending - Other funding not included

Cap Hub Project Number	Project Name	Development(s)	Total Cost	Amount Spent Prior to Plan	Remaining Planned for 2025	fy2026 Planned	fy2027	fy2028	fy2029	fy2030
•	22 Astor Street - Roof Replacement (2)	Scattered Site Family 705-01	$57,084	$0	$0	$57,084	$0	$0	$0	$0
•	Howard Street - Kitchen Modernization	Scattered Site Family 705-01	$159,797	$0	$0	$0	$0	$0	$0	$20,002
•	Howard Street - Bathroom modernization	Scattered Site Family 705-01	$45,543	$0	$0	$0	$0	$0	$0	$20,844
•	Howard Street - Building Envelope	Scattered Site Family 705-01	$275,356	$0	$0	$0	$0	$0	$0	$131,308
•	Siding & Insulation Replacement 189 Walker St Lowell (705-3-1)	Walker / Lane / Liberty 705-03	$512,984	$0	$0	$0	$53,263	$459,722	$0	$0

Capital Improvement Plan (CIP)

FUNDS IN ADDITION TO ANNUAL FORMULA FUNDING AWARD

Cap Hub Project Number	Project Name	DHCD Special Award Comment	Special DHCD Awards				Other Funding			
			Emergency Reserve	Compliance Reserve	Sustain-ability	Special Awards	CDBG	CPA	Operating Reserve	Other Funds
160103	FF:Federalization of Dublin Street	asbestos removal	$0	$8,000	$0	$300,000	$0	$0	$20,038	$0
160105	ModPHASE 2020 Lowell MtW: K&B Mod, Sitework, Accessible Unit	accessibility cost	$0	$644,900	$0	$2,854,411	$0	$0	$7,231	$0
160106	Paving and landscaping improvements	667-4C paving and site improvements	$0	$0	$0	$300,000	$0	$0	$0	$0
160113	Replace Roof at Pleasant Street & Lakeview Ave - SUST FY22	Attic Insulation	$0	$0	$27,661	$0	$0	$0	$0	$0
160115	Replacement of siding, window, and roof	asbestos	$0	$32,000	$18,500	$0	$0	$0	$0	$0
160119	ARPA FF: Building Envelope Upgrade & ASHP Install	ARPA Formula Funding	$0	$0	$30,000	$84,237	$0	$0	$0	$0

Capital Improvement Plan (CIP) Narrative

Including Requests to DHCD & Supporting Statements

1. **Request for increased spending flexibility.**
   DHCD designates a spending target (cap share) and an allowable spending range for each year of the CIP. A Housing Authority may request to shift the cap shares of the first three years in order to increase scheduling flexibility. A CIP utilizing this flexibility is called an Alternate CIP. The total spending over three years and over five years must continue to meet the limits set by DHCD. DHCD will approve an Alternate CIP only with acceptable justification and only if funding is available.

   Lowell Housing Authority has submitted an Alternate CIP with the following justification:

   - Other

   If we move projects forward to Year 1, we can't clear the 3-year benchmark.

2. **Request for additional funding.**
   A Housing Authority may request additional funding from DHCD for projects that qualify as emergencies, required legal compliance upgrades, or sustainability improvements.

   Lowell Housing Authority has requested $248,050.00 in DHCD Compliance Reserve funding for project #160-667-C2-0-25-1578, Electrical Upgrades. Reason: Requesting compliance reserve funds (electrical/fire code)

3. **Overall goals of the Housing Authority's CIP**

   Our overall goals at the Lowell Housing Authority is to improve and modernize our public housing units. The LHA identified projects to address kitchen and bath modernizations and building envelopes (roofs, siding, doors and windows, decks/railings, masonry, trim, paint) to the extent budget allows.

4. **Changes from the Housing Authority's previous CIP**
   Every new CIP differs from the previous CIP because projects have been completed and a new year has been added with new projects. These changes and other significant changes to the content of the CIP are highlighted below:

   No significant changes

5. **Requirements of previous CIP approval**
   There were no special conditions attached to the approval of our previous CIP.

6. Quarterly capital reports

Our most recent quarterly capital report (form 80 and 90) was submitted on 01/14/2025.

7. Capital Planning System (CPS) updates

Our CPS facility data has been updated with current condition information, including changes resulting from projects completed in the past year, as of 05/30/2025.

8. Project priorities

All the projects in our CIP are high priority (Priority 1 and 2 projects).

9. High priority deficiencies

We have not been able to include all of our high priority (CPS priority 1 and 2) projects in our CIP:

see attached

10. Accessibility

We are not aware of any accessibility deficiencies in our portfolio.

11. Special needs development

Lowell Housing Authority has one or more special needs (167 or 689 programs) development. We have completed the service provider input process according to the required procedures detailed in the lease agreement and held an annual meeting with the service provider staff at all special needs developments as of 04/09/2025.

Our CIP does not include recommendations by service provider staff. Following is a brief description of recommendations made by staff and the reason for not including them in the CIP.

Emails regarding minor deficiencies were exchanged with Vinfen Corp. representatives on 10/24/2024, repairs were requested of the 689-01 site (62 Colonial Ave.). A capital project discussion via Teams that included both Vinfen staff and the DMH representative was held 4/9/2025. Vinfen cited modernizing the 2nd floor bathroom and furnace replacements at 263 E. Merrimack St. (Garland House, 689-02)

12. Energy and water consumption

Our 12 most recent monthly energy reports are for months 2/2024 to 1/2025.

The following table lists the DHCD thresholds for Per Unit Monthly (PUM) expense for electricity, natural gas, oil, and water use and the developments at the Housing Authority that have expenses in excess of the thresholds, if any.

	Electric PUM > Threshold	Gas PUM > Threshold	Oil PUM > Threshold	Water PUM > Threshold
Threshold PUM:	$100	$80	$50	$60
	667-C4	705-01		705-01
	667-C3			667-C3
	667-C1			705-03
				705-02

The Authority will provide tenant and resident education aimed to improve energy efficiency and water conservation. Annual inspections will include reporting and addressing conditions that will lead to improved energy and water efficiency.

13. Energy or water saving initiatives

Lowell Housing Authority is not currently pursuing any energy or water-saving audits or grants that could affect CIP project scope, costs or timing of projects.

14. Vacancy rate

Our unadjusted vacancy rate reported to DHCD is as follows. (The unadjusted vacancy rate captured in these figures is the percentage of ALL housing units that are vacant, including both offline units being used for other purposes and units with DHCD vacancy waivers.)
2% c. 667 (DHCD Goal 2%)
0% c. 200 (DHCD Goal 2%)
10% c. 705 (DHCD Goal 2%)

Lowell Housing Authority will address the excess vacancies in the following manner:
Of the current six vacant units, 2 vacant 705-1 units are under vacancy waivers and require extensive renovation. Four (4) 705-1 units are undergoing turnover preparation, and are expected to be reoccupied in April-May 2025.

Maintenance and Repair Plan

Maintenance Objective

The goal of good property maintenance at a public housing authority is to serve the residents by assuring that the homes in which they live are decent, safe, and sanitary.

About This Maintenance and Repair Plan

This Maintenance & Repair Plan consists of several subsections describing maintenance systems followed by charts showing typical preventive maintenance, routine maintenance, and unit inspection tasks and schedules. These subsections are:

a. **Classification and Prioritization of Maintenance Tasks** - Defines and prioritizes types of work to be accomplished by maintenance staff and vendors. Explains how the housing authority is expected to respond to work orders (tasks or requests) based on the work order classification.
b. **Emergency Response System** - Defines what constitutes an emergency and how to notify staff of an emergency.
c. **Normal Maintenance Response System** - How to contact the maintenance staff for a non-emergency request.
d. **Work Order Management** - Description of the housing authority's system for managing work orders (tasks and requests).
e. **Maintenance Plan Narrative & Policy Statement** - Self-assessment, basic information, and goals for the coming year, along with a description of the housing authority's maintenance program.
f. **Preventive Maintenance Schedule** - A listing and schedule of tasks designed to keep systems and equipment operating properly, to extend the life these systems and equipment, and to avoid unexpected breakdowns.
g. **Routine Maintenance Schedule** - A listing and schedule of ordinary maintenance tasks such as mopping, mowing, raking, and trash collection required to keep the facilities in good condition.
h. **Unit Inspections** - Scheduling of annual unit inspections.

Classification and Prioritization of Maintenance Tasks

Maintenance items are tracked as "work orders" and are classified in the following categories. They are prioritized in the order listed. The following classifications and prioritization are required by the Department of Housing and Community Development (EOHLC).

I. **Emergencies** - Emergencies are only those conditions which are **immediately threatening** to the life or safety of our residents, staff, or structures.
   - Goal: initiated with 24 to 48 hours.

II. **Vacancy Refurbishment** - **Work necessary to make empty units ready for new tenants.**
   - After emergencies, the refurbishment of vacancies for immediate re-occupancy has the highest priority for staff assignments. **Everyday a unit is vacant is a day of lost rent.**
   - **Goal: vacancy work orders are completed within 30 calendar days or if not completed within that timeframe, LHA has a waiver**.

III. **Preventive Maintenance** - Work which must be done to **preserve and extend the useful life** of various elements of your physical property and avoid emergency situations.
   - A thorough Preventive Maintenance Program and Schedule that deals with all elements of the physical property is provided later in the document.
   - The Preventive Maintenance Program is reviewed and updated annually and as new systems and facilities are installed.

IV. **Programmed Maintenance** - Work which is important and is completed to the greatest extent possible within time and budget constraints. Programmed maintenance is grouped and scheduled to make its completion as efficient as possible. Sources of programmed maintenance include:
   - Routine Work includes those tasks that need to be done on a regular basis to keep our physical property in good shape. (Mopping, Mowing, Raking, Trash, etc.)
   - Inspections are the other source of programmed maintenance.
     ◊ Inspections are visual and operational examinations of parts of our property to determine their condition.
     ◊ All dwelling units, buildings and sites must be inspected at least annually.
     ◊ **Goal: Inspection-generated work orders are completed within 30 calendar days from the date of inspection, OR if cannot be completed within 30 calendar days, are added to the Deferred Maintenance Plan or the Capital Improvement Plan in the case of qualifying capital repairs (unless health/safety issue)**.

V. **Requested Maintenance** - Work which is requested by residents or others, does not fall into any category above, and should be accomplished as time and funds are available.
   - Requests from residents or others for maintenance work which does not fall into one of the other categories has the lowest priority for staff assignment.
   - **Goal: Requested work orders are completed in 14 calendar days from the date of tenant request or if not completed within that timeframe (and not a health or safety issue), the task is added and completed in a timely manner as a part of the Deferred Maintenance Plan and/or CIP.**

Emergency Request System

For emergency requests call the numbers listed here. Qualifying emergency work requests are listed below.

METHOD	CONTACT INFO.	TIMES
Call Answering Service	(978) 364-5334	24 Hrs.
Call LHA at Phone Number	(978) 364-5334	8:30am - 4:30pm Monday thru Friday
Other		

See attached **Preventative Maintenance Plan** for more details.

List of Emergencies - Emergencies are those conditions which are immediately threatening to the life or safety of our residents, staff, or structures. The following is a list of typical conditions that warrant an emergency response. If there is an emergency condition whether or not enumerated on this list please notify the office or answering service at the numbers listed above. If you have any questions regarding this list or other matters that may constitute an emergency, please contact the LOWELL HOUSING AUTHORITY main office.

QUALIFYING EMERGENCY WORK REQUESTS
Fires of any kind (Call 911)
Gas leaks/ Gas odor (Call 911)
No electric power in unit
Electrical hazards, sparking outlets
Broken water pipes, flood
No water/ unsafe water
Sewer or toilet blockage
Roof leak
Lock outs
Door or window lock failure
No heat
No hot water
Snow or ice hazard condition
Dangerous structural defects
Inoperable smoke/CO detectors, beeping or chirping
Elevator stoppage or entrapment
Wellness Check

Normal Maintenance Request Process

Make normal (non-emergency) maintenance requests using the following methods:

METHOD	CONTACT INFO.	TIMES
Text Phone Number		
Call Answering Service	(978) 364-5334	24 Hrs.
Call Housing Authority Office	(978) 364-5334	M-F 8:30AM - 4:30PM
Submit Online at Website		
Email to Following Email	apender@lhma.org or stighe@lhma.org	M-F 8:30AM - 4:30PM
Other	50 Stackpole Street, Lowell, MA	Walk into state property office request

Work Order Management

A. EOHLC review of this housing authority's operations shows that the authority uses the following system for tracking work orders: Emphasys/Elite

B. We do track deferred maintenance tasks in our work order system.

C. Our work order process includes the following steps:

Step	Description	Checked steps are used by LHA
1	Maintenance Request taken/submitted per the standard procedures listed above for the Emergency Request System and the Normal Maintenance Request Process.	☑
2	Maintenance Requests logged into the work system	☑
3	Work Orders generated	☑
4	Work Orders assigned	☑
5	Work Orders tracked	☑
6	Work Orders completed/closed out	☑
7	Maintenance Reports or Lists generated	☑

D. Additional comments by the LHA regarding work order management:

Maintenance Plan Narrative

Following are LOWELL HOUSING AUTHORITY's answers to questions posed by EOHLC.

A. Narrative Question #1: How would you assess your Maintenance Operations based on feedback you've received from staff, tenants, EOHLC's Performance Management Review (PMR) & Agreed Upon Procedures (AUP), and any other sources?

The Lowell Housing Authority Maintenance Operations Department has yet to receive negative feedback and continues to meet and exceed the needs and expectations of our staff, tenants, (PMR&AUP).

B. Narrative Question #2: What changes have you made to maintenance operations in the past year?

The Lowell Housing Authority has reassigned maintenance staff, added a Maintenance Supervisor utilizing skilled labor input. In addition, hired two Quality Assurance Inspectors.

C. Narrative Question #3: What are your maintenance goals for this coming year?

The Lowell Housing Authority maintenance goals for this coming year are as follows:

1. To utilize our Maintenance Budget effectively and efficiently, the Lowell Housing Authority is planning to increase preventative maintenance work to avoid unnecessary project expenditures that may arise moving forward.

2. Work diligently by keeping the interdepartmental lines of communication open by developing a scope of work/project timeline to turn-over the number of vacancies at a moderate pace.

D. Maintenance Budget Summary

The budget numbers shown below are for the consolidated budget only. They do not include values from supplemental budgets, if any.

	Total Regular Maintenance Budget	Extraordinary Maintenance Budget
Last Fiscal Year Budget	$535,617.00	$0.00
Last Fiscal Year Actual Spending	$579,233.00	$0.00
Current Fiscal Year Budget	$524,998.00	$0.00

E. Unit Turnover Summary

# Turnovers Last Fiscal Year	11
Average time from date vacated to make unit "Maintenance Ready"	34 days
Average time from date vacated to lease up of unit	78 days

F. Anything else to say regarding the Maintenance Plan Narrative?

Attachments

These items have been prepared by the LOWELL HOUSING AUTHORITY and appear on the following pages:

Preventive Maintenance Schedule - a table of preventive maintenance items showing specific tasks, who is responsible (staff or vendor), and the month(s) they are scheduled

Deferred Maintenance Schedule - a table of maintenance items which have been deferred due to lack of resources.

JANUARY 2025

- Monitor and issue on-going snow removal work orders
- Hot air furnace and boiler winter PM
- Oil circulator pumps
- Clean dryer vents
- Vehicle inspection:

    - Check all fluids levels
    - Check antifreeze, radiator rust inhibitors, and thermostats
    - Check windshield washer fluid
    - Check belts and hoses
    - Check plugs, wiring, battery, clean and grease terminals
    - Clean out air clears
    - Check wheel alignment and tire balance
    - Check the heater and defroster
    - Check wiper blades for wear and tear
    - Check the underbody for corrosion and hose off as needed
    - Change oil in all vehicles (quarterly)

- Check smoke and carbon monoxide
- Clean, disinfect and lubricate the compactor, doors and trash chutes
- Inventory tools, equipment, refrigerator and stoves in stock
- Inventory of supplies and small parts
- Unit inspection-yearly (100%)
- Lease enforcement:

    - Snow removal from front and rear egress
    - Common hallways and stairs are free from all

obstruction Holiday: January 20, 2025, Martin Luther King Jr

FEBRUARY 2025

- Monitor and issue on-going snow removal work orders
- AC, heat and air handler filter change
- Clean sanitary systems, lubricated valves and pumps
- Clean, disinfect and lubricate the compactor, doors and trash chutes
- Clean, strip, wax and buff carpets, VAT and linoleum flooring
- Vehicle inspection:

    - Check all fluids levels
    - Check antifreeze, radiator rust inhibitors, and thermostats
    - Check windshield washer fluid
    - Check belts and hoses
    - Check plugs, wiring, battery, clean and grease terminals
    - Clean out air clears
    - Check wheel alignment and tire balance
    - Check the heater and defroster
    - Check wiper blades for wear and tear
    - Check the underbody for corrosion and hose off as needed
    - Change oil in all vehicles (quarterly)

- Check smoke and carbon monoxide
- Clean and disinfect compactor and trash chutes
- Inventory tools, equipment, refrigerator and stoves in stock
- Inventory of supplies and small parts
- Unit inspection-yearly (100%)
- Lease enforcement:

    - Snow removal from front and rear egress
    - Common hallways and stairs are free from all

    Holiday: February 17, 2025, President's Day

MARCH 2025

- Second Sunday, reset light timers and clocks for daylight saving time
- Monitor and issue on-going snow removal work orders
- Clean storage rooms and maintenance areas
- Touch up all common area walls and ceiling
- Clean heater vents in all common areas
- Vehicle inspection:

    - Check all fluids levels
    - Check antifreeze, radiator rust inhibitors, and thermostats
    - Check windshield washer fluid
    - Check belts and hoses
    - Check plugs, wiring, battery, clean and grease terminals
    - Clean out air clears
    - Check wheel alignment and tire balance
    - Check the heater and defroster
    - Check wiper blades for wear and tear
    - Check the underbody for corrosion and hose off as needed
    - Change oil in all vehicles (quarterly)

- Check smoke and carbon monoxide
- Clean and disinfect compactor and trash chutes
- Inventory tools, equipment, refrigerator and stoves in stock
- Inventory of supplies and small parts
- Unit inspection-yearly (100%)
- Lease enforcement:

    - Snow removal from front and rear egress
    - Common hallways and stairs are free from all obstruction

        - Holiday: N/A

APRIL 2025

- Inspect all entry doors
- Clean dyer vents, exhaust vents and roof vents
- Service lawn equipment
- Inspect roof and siding
- Clean common area carpets, VAT and linoleum flooring
- Clean, disinfect and lubricate the compactor, doors and trash chutes
- Clean parking areas, roadways, driveways, walkways and storm drains
- Inspect trees and trim as needed (maintain 10 feet distance from building)

- Vehicle inspection:
    - Check all fluids levels
    - Check antifreeze, radiator rust inhibitors, and thermostats
    - Check windshield washer fluid
    - Check belts and hoses
    - Check plugs, wiring, battery, clean and grease terminals
    - Clean out air clears
    - Check wheel alignment and tire balance
    - Check the heater and defroster
    - Check wiper blades for wear and tear
    - Check the underbody for corrosion and hose off as needed
    - Change oil in all vehicles (quarterly)

- Check smoke and carbon monoxide
- Inventory tools, equipment, refrigerator and stoves in stock
- Inventory of supplies and small parts
- Unit inspection-yearly (100%)
- Lease enforcement:
    - Snow removal from front and rear egress
    - Common hallways and stairs are free from all obstruction
- Check for proper AC installation and removal (seasonal)

Holiday: April 15, 2025, Patriots Day

MAY 2025

- Clean all manhole
- Emergency Generator PM
- Clean AC condensers
- Sidewalk and parking lot cracks and crevice sealing and repair
- Weed treatment at all sites
- Edge and mulch all planting beds
- Clean, disinfect and lubricate the compactor, doors and trash chutes
- Prune and trim all shrubs and bushes away from building (maintain 2 feet clearance from all structures)
- Fertilize lawn throughout sites
- Vehicle inspection:

    - Check all fluids levels
    - Check antifreeze, radiator rust inhibitors, and thermostats
    - Check windshield washer fluid
    - Check belts and hoses
    - Check plugs, wiring, battery, clean and grease terminals
    - Clean out air clears
    - Check wheel alignment and tire balance
    - Check the heater and defroster
    - Check wiper blades for wear and tear
    - Check the underbody for corrosion and hose off as needed
    - Change oil in all vehicles (quarterly)
    - Check smoke and carbon monoxide
    - Inventory tools, equipment, refrigerator and stoves in stock
    - Inventory of supplies and small parts
    - Unit inspection-yearly (100%)
    - Lease enforcement:
    - Snow removal from front and rear egress
    - Common hallways and stairs are free from all obstruction
    - Check for proper AC installation and removal (seasonal)
    - Check grills and fire pits (seasonal)

Holiday: May 26, 2025- Memorial Day

JUNE 2025

- Summer boiler shut down and PM services (June 16th to September 14Th)
- Change AC, heater and air filter
- Check emergency lighting and repair as needed
- Weed, cut grass and edge all plant beds and sites every 2 weeks (June 1st to October 1st)
- Inspect site railings, walkways and stairs for potential hazards and repair as needed
- Clean, disinfect and lubricate the compactor, doors and trash chutes
- Check flags and replace them as needed
- Vehicle inspection:

    - Check all fluids levels
    - Check antifreeze, radiator rust inhibitors, and thermostats
    - Check windshield washer fluid
    - Check belts and hoses
    - Check plugs, wiring, battery, clean and grease terminals
    - Clean out air clears
    - Check wheel alignment and tire balance
    - Check the heater and defroster
    - Check wiper blades for wear and tear
    - Check the underbody for corrosion and hose off as needed
    - Change oil in all vehicles (quarterly)

- Check smoke and carbon monoxide
- Inventory tools, equipment, refrigerator and stoves in stock
- Inventory of supplies and small parts
- Unit inspection-yearly (100%)
- Lease enforcement:
    - Snow removal from front and rear egress
    - Common hallways and stairs are free from all obstruction
    - Check for proper AC installation and removal (seasonal)
    - Check grills (seasonal)

Holiday: June 19th, 2025-Juneteeth

JULY 2025

- Clean dyer vents, exhaust vents and roof vents
- Inspect gutters, downspout and splash guards repair as needed
- Inspect common area windows (glass, seals, balances and locks)
- Inspect and repair fences
- Clean, disinfect and lubricate the compactor, doors and trash chutes
- Vehicle inspection:

    - Check all fluids levels
    - Check antifreeze, radiator rust inhibitors, and thermostats
    - Check windshield washer fluid
    - Check belts and hoses
    - Check plugs, wiring, battery, clean and grease terminals
    - Clean out air clears
    - Check wheel alignment and tire balance
    - Check the heater and defroster
    - Check wiper blades for wear and tear
    - Check the underbody for corrosion and hose off as needed
    - Change oil in all vehicles (quarterly)

- Check smoke and carbon monoxide
- Inventory tools, equipment, refrigerator and stoves in stock
- Inventory of supplies and small parts
- Unit inspection-yearly (100%)
- Lease enforcement:
    - Common hallways and stairs are free from all obstruction
    - Check for proper AC installation and removal (seasonal)
    - Check grills and fire pits (seasonal)
    - Pet vaccines and licenses (yearly)

Holiday: July 4, 2025, Independence Day

AUGUST 2025

- Clean, strip, wax and buff carpets, VAT and linoleum flooring
- AC units service as needed
- Clean, disinfect and lubricate the compactor, doors and trash chutes
- Vehicle inspection:

    - Check all fluids levels
    - Check antifreeze, radiator rust inhibitors, and thermostats
    - Check windshield washer fluid
    - Check belts and hoses
    - Check plugs, wiring, battery, clean and grease terminals
    - Clean out air clears
    - Check wheel alignment and tire balance
    - Check the heater and defroster
    - Check wiper blades for wear and tear
    - Check the underbody for corrosion and hose off as needed
    - Change oil in all vehicles (quarterly)

- Check smoke and carbon monoxide
- Inventory tools, equipment, refrigerator and stoves in stock
- Inventory of supplies and small parts
- Unit inspection-yearly (100%)
- Lease enforcement:

    - Common hallways and stairs are free from all obstruction
    - Check for proper AC installation and removal (seasonal)
    - Check grills and fire pits (seasonal)
    - Pet vaccines and licenses (yearly)

Holiday:

SEPTEMBER 2025

- Check electrical panels and GFCI in boiler room and throughout sites
- Check and service as needed all water heaters
- Clean and organize storage room and maintenance areas
- Check all common area walls and ceiling make repair and touch ups as needed
- Clean heater vents at all sites
- Clean, disinfect and lubricate the compactor, doors and trash chutes

- Vehicle inspection:
  - Check all fluids levels
  - Check antifreeze, radiator rust inhibitors, and thermostats
  - Check windshield washer fluid
  - Check belts and hoses
  - Check plugs, wiring, battery, clean and grease terminals
  - Clean out air clears
  - Check wheel alignment and tire balance
  - Check the heater and defroster
  - Check wiper blades for wear and tear
  - Check the underbody for corrosion and hose off as needed
  - Change oil in all vehicles (quarterly)

- Check smoke and carbon monoxide
- Inventory tools, equipment, refrigerator and stoves in stock
- Inventory of supplies and small parts
- Unit inspection-yearly (100%)
- Lease enforcement:

  - Snow removal from front and rear egress
  - Common hallways and stairs are free from all obstruction
  - Check for proper AC installation and removal (seasonal)
  - Check grills and fire pits (seasonal)
  - Pet vaccines and licenses (yearly)

Holiday: September 1, 2025, Labor Day

OCTOBER 2025

- Fire Prevention month:
  Check and perform PM on all fire systems, sprinklers, fire pumps, fire extinguishers, common areas and egresses
  Fire extinguisher annual recertification

- Heating system PM, inspection and repair as needed (Heating season September 15th to June 15th)
- Change AC, heat and air exchanger filters
- Cleaning and removal of leaves in gutters and all sites
- Inspect for clearance, 5 feet around all heating system all sites
- Vehicle inspection:
  - Check all fluids levels
  - Check antifreeze, radiator rust inhibitors, and thermostats
  - Check windshield washer fluid
  - Check belts and hoses
  - Check plugs, wiring, battery, clean and grease terminals
  - Clean out air clears
  - Check wheel alignment and tire balance
  - Check the heater and defroster
  - Check wiper blades for wear and tear
  - Check the underbody for corrosion and hose off as needed
  - Change oil in all vehicles (quarterly)

- Check smoke and carbon monoxide
- Inventory tools, equipment, refrigerator and stoves in stock
- Inventory of supplies and small parts

- Unit inspection-yearly (100%)
- Lease enforcement:
  - Snow removal from front and rear egress
  - Common hallways and stairs are free from all obstruction
  - Check for proper AC installation and removal (seasonal)
  - Check grills and fire pits (seasonal)
  - Pet vaccines and licenses (yearly)
  - Decorations: cords running though doors and window safety hazards

  Holiday- Columbus Day-October 13, 2025

NOVEMBER 2025

- On the first Saturday in November reset timers and clock back 1 hour for day light savings
- Monitor and issue on going snow and ice removal work orders
- Inspect trees and trim as needed to maintain 10-foot clearance of all building
- Clean, disinfect and lubricate the compactor, doors and trash chutes
- Clean, strip, wax and buff carpets, VAT and linoleum flooring
- Vehicle inspection:

    - Check all fluids levels
    - Check antifreeze, radiator rust inhibitors, and thermostats
    - Check windshield washer fluid
    - Check belts and hoses
    - Check plugs, wiring, battery, clean and grease terminals
    - Clean out air clears
    - Check wheel alignment and tire balance
    - Check the heater and defroster
    - Check wiper blades for wear and tear
    - Check the underbody for corrosion and hose off as needed
    - Change oil in all vehicles (quarterly)

- Check smoke and carbon monoxide
- Inventory tools, equipment, refrigerator and stoves in stock
- Inventory of supplies and small parts
- Unit inspection yearly (I 00%)
- Lease enforcement:
    - Snow removal from front and rear egress
    - Common hallways and stairs are free from all obstruction
    - Check for proper AC installation and removal (seasonal)
    - Check grills and fire pits (seasonal)
    - Pet vaccines and licenses (yearly)Decorations: cords running though doors and windows safety hazards

Holiday: November 11, 2025, Veterans Day and November 27, 2025, Thanksgiving

DECEMBER 2025

- Check replace Flags as needed
- Monitor and issue on going snow and ice removal work orders
- Inspect trees and trim as needed to maintain 10-foot clearance of all building
- Clean, disinfect and lubricate the compactor, doors and trash chutes
- Clean, strip, wax and buff carpets, VAT and linoleum flooring
- Vehicle inspection:
    - Check all fluids levels
    - Check antifreeze, radiator rust inhibitors, and thermostats
    - Check windshield washer fluid
    - Check belts and hoses
    - Check plugs, wiring, battery, clean and grease terminals
    - Clean out air clears
    - Check wheel alignment and tire balance
    - Check the heater and defroster
    - Check wiper blades for wear and tear
    - Check the underbody for corrosion and hose off as needed
    - Change oil in all vehicles (quarterly)
- Check smoke and carbon monoxide
- Inventory tools, equipment, refrigerator and stoves in stock
- Inventory of supplies and small parts
- Unit inspection-yearly (100%)
- Lease enforcement:
    - Snow removal from front and rear egress
    - Common hallways and stairs are free from all obstruction
    - Check for proper AC installation and removal (seasonal)
    - Check grills and fire pits (seasonal)
    - Pet vaccines and licenses (yearly)
- Decorations: cords running though doors and windows, safety hazards

Holiday: December 25, 2025, Christmas

Lowell Housing Authority

Work Order Report

Report: From: 10/01/2023 To: 09/30/2024

Tuesday, January 21, 2025

Development: 705 and NIP

Work Order type: Deferred Maintenance

Work Order Status: Closed

No.	WorkOrder#	EntityID	UnitID	FullName	PrimaryStreet	Suite	OpenDate
1	498,943	*000068506*	73LI15	Sophany Heou	106 Liberty St. 3rd. Rf	15	04/30/2024
	Entered By:	**Ashley Pender**					
		Bathroom 1 - Bathtub/Shower - Bath/shower basin discovered on more than 50% of surface - May have cracked tub					
2	498,944	*000068506*	73LI15	Sophany Heou	106 Liberty St. 3rd. Rf	15	04/30/2024
	Entered By:	**Ashley Pender**					
		Kitchen - Refridgerator - Refridgerator door seal is damaged					
3	497,842	*Common Area*			99 Grand Street		04/30/2024
	Entered By:	**Ashley Pender**					
		125 Grand ST Front of Building- tripping hazard- Stepps Grounds vegetation on fence Pot holes in parking lot back door passage set damaged steps are looose and cracking					
4	497,865	*Common Area*			106 Liberty Street		04/30/2024
	Entered By:	**Ashley Pender**					
		roof repair needed drianage is blocked and water is unable to drain properly egree 13-14-16 remove trash from hallway					
5	498,826	*000073274*	73LI05	Cynthia Guzman	106 Liberty St. 1st. Rf	5	04/30/2024
	Entered By:	**Ashley Pender**					
		Living Room - HVAC Equipment - General Comment - Storage in boiler room					
6	498,940	*000096809*	73LI13	Allen Emmanuel Rodı	106 Liberty St. 3rd. Lf	13	04/30/2024
	Entered By:	**Ashley Pender**					
		Entire Unit - No Issues/Violations - Inspected No Issues Were Found					
7	498,828	*000071558*	73LI06	Angela Ruales	106 Liberty St. 1st. Rr	6	04/30/2024
	Entered By:	**Ashley Pender**					
		Entire Unit - No Issues/Violations - Inspected - No Issues Were Found					
8	498,837	*000071253*	73LI11	Ashley Zipps	106 Liberty St. 2nd. Rf	11	04/30/2024

	Entered By:	**Ashley Pender**					
		Bathroom 1 - Floor Covering & Finish - Floor component (s) is not functionally adequate					
		Bathroom 1 - Plumbling & Water Leaks - Plumbing Leaks					
		Bathroom 1 - Toilet - Toilet components are damaged but overall functional, Running continously					
		Bathroom 1 - Toilet - Toilet components are damaged but overall functional, Toilet seat					
		Bedroom 1 - Wall Covering and Finish - Interior wall has hole greater than 2in.					
		Bedroom 2 - Door - General - Closet door component is missing, damaged or inoperable					
		Kitchen - Cabinetry - More than 50% of cabinet components are missing, damaged, or inoperable					
		Living Room - Door - General - Closet door component is damaged, missing or inoperable					
9	497,535	*000072336*	73LA08	Beatriz Rijo	51 Lane St. 2nd. House	8	11/07/2023
	Entered By:	**Ashley Pender**					
		Bathroom shower componets are missing or damaged					
		Bathroom- replace floor- replace light fixture					
		Bedroom 3- ceiling has crack					
		kitchen sink dripping and minor repair needed					
10	499,000	*000094942*	73LI16	COURTNEY QUEEN	106 Liberty St. 3rd. Rr	16	04/30/2024
	Entered By:	**Ashley Pender**					
		Alternate Location - Flammables or Combustibles - General Comment - Living room excessive piles					
		Bedroom 2 - Flammable or Combustiles - Excessive trash					
		Kitchen - Refrigerator - Refridgerator drawers or shelving is damaged					
11	500,933	*000071248*	NIP019	Emily Burgos	71 Howard Street	19	05/23/2024
	Entered By:	**Ashley Pender**					
		bathroom1-					
		floor components is not functionally adequate-elevated moisture level in a unit-window screen has a hole greater than					
		bdrm3-interior wall has hole greater than 2ins					
		hallyway/corridors-elevated moisture level in a unit- rain water coming in during storm					
		Livingrm-window has hole greater than 1in-window will no open and stay open					
12	496,975	*000078770*	702006	Geneviere Perry	50 Dublin Street	6	08/07/2024
	Entered By:	**Ashley Pender**					
		Basement--PRESSURE RELEIF VALVE TERMINATES HIGHER THAN 6IN. OR LESS THN 2IN FROM THE WA LEVEL					
		BDRM-2- CEILING COVERING AND FINISHES-CEILING HAS AN UNSTABLE SURFACE					
		HALLWAYS&CORRIDORS-CONDUCTORS, OUTLETS SWITCHES-ELECTRICAL CONDUCTOR IS NOT PRC INSULATED/ENCLOSED -					
		LIVING ROOM-DOOR- A PASSAGE DOOR COMPONENT IS DAMAGED/MISSING/INOPERABLEUNABLE T					
13	497,843	*000066416*	NIP010	Iris Perez	125 Grand Street	A	04/22/2024
	Entered By:	**Ashley Pender**					
		bthrm- floor repair or replace					
		toilet loose at base					
		bdrm1 and 2- and LVRM- window has a hole-tree growing into screen					
		kitchen window sash or frame is damaged or missing					
		Main door entry damaged					
14	499,413	*000077873*	NIP001	Janessa J Benitez	68 Grand Street	1	05/23/2024
	Entered By:	**Ashley Pender**					
		Basement - Egress - General Comment					
		Basement - Plumbing & Water Leaks - Plumbing Leaks					
		Bathroom 2 - Floor Covering and Finish - Floor component(s) is not functionally adequate					
		Bedroom 1 - Window - A unit window screen has a hole, tear, or cut of more than one inch					
		Bedroom 2 - Window - A unit window screen has a hole, tear, or cut of more than one inch - Bedroom 3					
		Hallways & Corridors - Ceilng Covering and Finishes - Ceiling has an unstable surface - Leaking from roof and dripp					
		Hallways & Corridors - Smoke Alarms - General Comment					
		Kitchen - Cabinetry - More than 50% of cabinet components are missing, damaged, or inoperable					
		Kitchen - Ventilation/Exhaust - Exhaust system does not respond to control switch - Lights out					
15	499,977	*000077873*	NIP001	Janessa J Benitez	68 Grand Street	1	05/23/2024
	Entered By:	**Ashley Pender**					
		Rooftop - Door-General - An exterior door component is damged or missing (not entry door or fire rated) - Roof wind					
16	496,966	*000086548*	702004	Karen Blanco	46 Dublin Street	4	08/05/2024

	Entered By:	**Ashley Pender** Basement-Light Fixture -A permanently installed light fixture is inoperable- No light workings-Pressure releif valve te from the waste receptor flood level Bthrm 1- Ceiling has unstable surface- Exhaust system component is damaged or missing(Clogged)					
17	498,825	*000077065*	73LI02	Katiria Nazario	106 Liberty St. 1st. Lr	2	04/30/2024
	Entered By:	**Ashley Pender** Kitchen - Plumbing & Water Leaks - Plumbing Leaks					
18	500,869	*000083046*	NIP002	Leana Maria Rodrigue	92 Grand Street	2	05/23/2024
	Entered By:	**Ashley Pender** 2 OR MORE DELAMINATION OR SEPARATION ON DOOR SURFACE-bATHROOM BDRM-2- WINDOW-A UNIT WINDOW SCREEN HAS A HOLE/TEAR OR CUT OF MORE THAN 1IN KITCHEN- SINK- CONTROL KNOBS DO NOT ACTIVATE HOT OR COLD WATER					
19	500,873	*000083046*	NIP002	Leana Maria Rodrigue	92 Grand Street	2	05/23/2024
	Entered By:	**Ashley Pender** SPONGY FLOOR AT TOILET AREA-SEACURE TOILET LOOSE HALLWAY-LIGHT FIXTURE IS INOPERABLE-ATTIC ROOM THE ENTIRE COUNTER TOP IS NOT ADEQUATE-LOOSE AT WALL AND SINK kITCHEN LIGHT-INTERIOR IS INOPERABLE REFRIGERATOR SEAL IS DAMAGED					
20	498,831	*000083185*	73LI07	Melissa Ouellette	106 Liberty St. 2nd. Lf	7	04/30/2024
	Entered By:	**Ashley Pender** Bathroom 1 - Toilet - Intertior - Toilet components are damaged but overall functional - Toilet Seat Bathroom 1 - Wall Covering and Finish - Interior - Wall has a loose or detached surface covering - Water damage Bedroom 1 - Infestation - General Comment - Dog urine and feces Bedroom 2 - Infestation - General Comment - Dog urine and feces					
21	498,939	*000070843*	73LI12	Natasha Caswell	106 Liberty St. 2nd. Rr	12	04/30/2024
	Entered By:	**Ashley Pender** Alternate Location - Door Surface Entry - Entry door frame, threshold, or trim is damaged or missing - Bedroom Bathroom 1 - Ceiling Covering and Finishes - Ceiling has a hole 2in, or more in diameter - Bathroom ventilation syste Bathroom 1 - Exhaust System - Bathroom ventilation system is inoperable Bathroom 1 - Toilet - Toilet is not secured at base/loose Bedroom 1 - Door General - Closet door component is missing. damaged, or inoperable Kitchen - Refrigerator - Refrigerator door seat is damaged Living Room - HVAC Equipment - General Comment - Storage Living Room - Window - A unit window will not open or stay open					
22	493,013	*000057995*	NIP021	Rita Poku	58 D Street	21	03/07/2024
	Entered By:	**Ashley Pender** Bathroom1-Bathtub/Shower-Bath/shower basin discolored on more than 50% of surface-Upstairs bathroom Bathroom1- Window -A unit window will not open or stay open-Upstairs Bathroom2-Bathtub-/Shower Bath/shower components damaged, missing or inoperable-downstairs Bathroom2-Light Fixture-A permanently instakked light fixture is inoperable-Downstairs Bathroom2-Mold-Like Substances-Elevated moisture level in a unit-Downstairs Bathroom2-Toilet-Toilet components are damaged but overall functional-Downstairs seat and continouously running bedroom1-Ceiling covering and finishes-Ceiling has unstable surface-Peeling paint Bedroom 1-Light Fixture-A permanently installed light fixture inoperable Bedroom1-Wall Covering and finish-Interior wall component(s) is not functional adequate-Peeling paint Dining Room-Window-A unit window pane, sash, or frame is damaged or missing-Glass crack Livingroom-Window-a unit window pane, sash or frame is damaged or missing-frame rotting Alternate Locartion-Roof Assembly-The roofing soffits, eaves, fascia, or deck is damaged Side of Building-Private Road/Driveway-General Comment- Plus tree next to parking area is rottent and needs remova Side of Buiilding-Private Road/Driveway-Any one pthole is greater than 47in deep and 1 SF in area					
23	497,844	*000076044*	NIP011	Samantha Frazier	125 Grand Street	B	04/22/2024
	Entered By:	**Ashley Pender** bthrm-tub/shower basin discolored on more than 50% of surface Ktch-window-Back storm door has tear Ktch sink-Damaged component-Aerator					
24	493,008	*000066473*	NIP020	Toeur Pin	22 Astor Street	HS2	03/07/2024

	Entered By:	**Ashley Pender** -Basement-Water-Heather General Comment-Cover-X Bathroom 1 Light Fixture-Interior-A permanently installed light fixture is inoperable-X Bathroom 1-Sink-Sink component damage or missing Downstairs Dripping -X Bathroom 1 Toilet-Toilet-Toliet not secured at base/loose-DOwnstairs-X Bathroom 2-Light Fixture-Interior Fixture is inoperable-Upstairs-X Bathrrom 2-Mold Like Substance-Elevated moisture level in a unit-X Bedroom 4- Window-A unit window screen has a hole, tear, or cut of more than 1in.-X Kitchen-Ventilation/Exhaust-Exhaust system component is damaged or missing-Light out-X Kitchen- Window-A unit window screen has a hole , tear, or cut of more than 1in-X Alternate Location See notes for Details-Roof Assembly-Any amount of roofing substrate is exposed-Back Porch-X Rear of Building- Sidewalk, walkway, or ramp is functional adequate-TOBY Walkway/Steps-Sidewalk/walkway Ramp-Sidewalk, walkway or ramp is not functional adequate -TOBY					
25	496,980	*000072154*	702008	Yanet Pena	54 Dublin Street	8	08/05/2024
	Entered By:	**Ashley Pender** Basement-Water Heater-Pressure relief valve terminates higher than 6in or less than 2in from waste receptor flood leve hallways and Corridors-Light Fixtures (interior) A permanently installed light fixture is inoperable-hallway to kitchen					
26	498,942	*000098588*	73LI14	YARITZA PIMENTE	106 Liberty St. 3rd. Lr	14	04/30/2024
	Entered By:	**Ashley Pender** Bathroom 1 - Exhaust System - Exhaust system does not respond to the control switch Bathroom 1 - Light Fixtures (Interior) - Insuffcient illumination in kitchen or bathroom Bathroom 1 - Mold-Like Substances - Elevated moisture level in a unit Bedroom 1 - Door General - A passage door component is damaged/missing/inoperable Kitchen - Cabinetry - More than 50% of cabinet components are missing, damaged, or inoperable - Doors loose Kitchen - Mold-Like Substances - Elevated moisture level in a unit					
27	497,845	*000071400*	NIP12D	Yessenia Grisel Sanch	125 Grand Street	D	04/22/2024
	Entered By:	**Ashley Pender** bthrm-toilet loose bdrm-2- remove and paint stain ceiling ktch-repair or replace floor					

Work Order Status: Open

No.	WorkOrder#	EntityID	UnitID	FullName	PrimaryStreet	Suite	OpenDate
28	497,524	*Unit*	73LA01		51 Lane St. 1st. L	1	11/07/2023
	Entered By:	**Ashley Pender** Bathroom 1-Plug has something stuck inside- remove or replace GFI Remove storgae in boiler-ashley Will address with letter- Kitchen sink dripps Kitchen exhast fan has restricted airflow no filter and peeling					
29	497,534	*000073341*	73LA07	Aracelis Santos	51 Lane St. 1st. House	7	11/07/2023
	Entered By:	**Ashley Pender** Kitchen entry door- damaged Bathtub/shower basin orpan damaged Check ceilingin bathroom- maybe unstable replace light fixture in bathroom remove stains from ceiling in bathroom bedroom-2-window wont stay open check kithen sink minor damage livingroom door passageset is damaged					
30	497,526	*000080219*	73LA02	Caroline Rivera	51 Lane St. 1st. R	2	11/07/2023
	Entered By:	**Ashley Pender** bathroom 1- exhaust system componet is damaged or missing - remove any stains from ceiling using bleach-Check wa off					
31	497,532	*000093612*	73LA05	Luisanna Dilone	51 Lane Street	5	11/07/2023
	Entered By:	**Ashley Pender** Bathroom-remove stain from ceiling- Check Exhaust system					
32	497,531	*000084781*	73LA04	natia clarke	51 Lane St. 2nd. R	4	11/07/2023

	Entered By:	**Ashley Pender** replaced window screen in bedroom					
33	497,533	*000091795*	73LA06	NYASHANTTY ARA	51 Lane St. 3rd. R	6	11/07/2023
	Entered By:	**Ashley Pender** bedroom 1- replace floor laudry room dryer-dryer transition duct is not constructed of mental or an approved material Water heater-Cover is off					

Summary Report for 705 and NIP

Total Number of Days	=	**3229**
Total Number of Worker Orders	=	**33**
Average Down Days	=	**97.85**

Development: State Scattered Sites

Work Order type: Deferred Maintenance

Work Order Status: Closed

No.	WorkOrder#	EntityID	UnitID	FullName	PrimaryStreet	Suite	OpenDate
34	500,218	*000091712*	SS4014	Ana Polanco	208 Hale Street	4-14	04/30/2024
	Entered By:	**Ashley Pender**					
		Kitchen - Flammables or Combustibles - General Comment - Left gas half on on stove airing unit out					
35	500,833	*000091712*	SS4014	Ana Polanco	208 Hale Street	4-14	06/20/2024
	Entered By:	**Wanda Bouras**					
		Kitchen- Flammables or Combustibles- General Comment- Left gas half on on stove airing unit out					
36	500,006	*000054476*	SS4005	Angela Cruz	190 Hale Street	4-5	04/30/2024
	Entered By:	**Ashley Pender**					
		Bathroom 1 - Floor Covering and Finshes - Floor component (s) is not functionally adequate					
		Bathroom 1 - Toilet - Toilet is not secured at base/loose					
		Main Entry - Door Surface-Entry (non-fire) - Glass is missing within the door, side lites, or transom - Both storm door					
37	500,806	*000054476*	SS4005	Angela Cruz	190 Hale Street	4-5	06/20/2024
	Entered By:	**Wanda Bouras**					
		Bathroom 1- Floor Covering and Finishes- Floor components in not funtionally adequate.					
		Bathroom 1- Infestation- Evidence of cockroaches (live, dead, or other Evidence)					
		Bathroom 1- Toilet- Toilet is not secured at base/loose					
		Living Room- Smoke Alarms- Smoke alarm does not produce an audio or visual alarm when tested.					
		Main Entry- Doord Surface-Entry (non-fire) - Glass is missing within the door, side lites, or transom. (Both storm doc					
38	500,821	*000068847*	SS4008	Chan Nout	196 Hale Street	4-8	06/20/2024
	Entered By:	**Wanda Bouras**					
		*196 Hale Street - Bathroom 1- Toilet- General Comment- Toilet seat and shade					
		Kitchen- Refrigerator- Refrigerator door seal is damaged					
		Living Room- Door-General- A passage door component is damaged/missing/inoperable- Screen door not unlocking					
39	500,011	*000068847*	SS4008	Chan Nout	196 Hale Street	4-8	04/30/2024
	Entered By:	**Ashley Pender**					
		Bathroom 1 - Toilet - General Comment - Toilet Seat and shade					
		Kitchen - Refridgerator - Refridgerator door seal is damaged					
		Living Room - Door-General - A passage door component is damaged/missing/inoperable - Screen door not unlocking					
40	497,857	*000058633*	SS5004	Crucita Ortiz	106 Liberty Street	4	04/30/2024
	Entered By:	**Ashley Pender**					
		bdrm-1 door- door conponet damged or missing					
		ktch cabinets need to be replaced or repaired					
		main door is damaged threshold					
41	499,981	*000086432*	SS4002	Cynthia Selden	184 Hale Street	4-2	04/30/2024
	Entered By:	**Ashley Pender**					
		Kitchen - Cabinetry - More than 50% of cabinet components are missing, damaged, or inoperable.					
42	500,795	*000086432*	SS4002	Cynthia Selden	184 Hale Street	4-2	06/20/2024
	Entered By:	**Wanda Bouras**					
		Kitchen- Cabinetry- More than 50% of cabinet is components are missing, damaged or inoperable.					
43	500,013	*000040962*	SS4010	Donna L Norton	200 Hale Street	4-10	04/30/2024
	Entered By:	**Ashley Pender**					
		Alternate Location - Min. Elec. & Lighting Requirement - General Comment - Outsde lights inoperable					
		Kitchen - Cabinetry - More than 50% of cabinet components are missing, damaged, or inoperable					

44	500,831	*000040962*	SS4010	Donna L Norton	200 Hale Street	4-10	06/20/2024
	Entered By:	**Wanda Bouras**					
		Alternate Location- Min. Elec. & Lighting- See Notes- for Details Requirement- General Comment- Outside lights in					
		Kitchen- Cabinetry- More than 50% of cabinet components are missing, damaged, or inoperable					
45	499,980	*000050726*	SS4001	Edward Curtis	182 Hale Street	4-1	04/30/2024
	Entered By:	**Ashley Pender**					
		Bathroom 1 - Floor Covering & Finishes - Subfloor is bowng, buckling, buldging, sagging, or misaligned within any r					
		Main Entry - Door Surface-Entry - 1/4 inch or greater penetrative hole in door surface					
46	500,793	*000050726*	SS4001	Edward Curtis	182 Hale Street	4-1	06/20/2024
	Entered By:	**Wanda Bouras**					
		Bathroom 1- Floor Covering and Finishes- Subfloor is bowing, buckling, bulging, sagging, or misaligned within any r					
		Main Entry- Door Surface-Entry (non-fire) - 1/4 inch or greater penetrative hole in door surface.					
47	500,842	*000079400*	SS3009	Elycia Ruiz	237 Pleasant Street	3-9	07/31/2024
	Entered By:	**Ashley Pender**					
		bathroom hole is sagging/has hole needs to be repaired/replaced if needed					
		refrige needs to be repaired or replaced -test					
		repair unit door-front screen door is damaged					
48	500,012	*000075317*	SS4009	Enrique Maldonado	198 Hale Street	4-9	04/30/2024
	Entered By:	**Ashley Pender**					
		Living Room - HV/AC Equipment - General Comment - Krob missng					
49	500,830	*000075317*	SS4009	Enrique Maldonado	198 Hale Street	4-9	06/20/2024
	Entered By:	**Wanda Bouras**					
		Living Room- HVAC Equipment- General Comment- Knob missing.					
50	492,897	*000071437*	SS2001	Fernando F Diaz	151 Lakeview Avenue	2-1	02/27/2024
	Entered By:	**Ashley Pender**					
		-Bthroom Any wood rot, sloping or deflection in flooring-Behind toilet					
		Kitchen-Missing GFCI protection on outlet within Six Ft of water source-24 Hours					
		Living room-A passage door component is damaged/missing/inoperable-Front screen door					
51	500,596	*000026451*	SS3006	GAYLE R MARCELI	476 Concord Street	3-6	07/31/2024
	Entered By:	**Ashley Pender**					
		Living Room - Door-General - A passage door component is damaged/missing/inoperable - Front screen door					
		Living Room - Window - General Comment - Need new shades					
52	500,594	*000049076*	SS3003	Jason Pratt	464 Concord Street	3-3	07/31/2024
	Entered By:	**Ashley Pender**					
		Bathroom 1 - Bathroom/Shower - Bath/shower basic discolored on more than 50 % of surface					
		Bathroom 1 - Ceiling Covering and Finishes - Ceiling have an unstable surface					
		Bathroom 1 - Wall Covering and Finish-Interior - Wall is buckling, bulding, or bowing					
		Living Room - Door-General - A passage door component is damaged/missing/inoperable - Front screen door					
53	500,934	*000057324*	SS3010	Jo-Ann Patterson	239 Pleasant St	3-10	07/31/2024
	Entered By:	**Ashley Pender**					
		bthrm1-window has hole greater than 1in					
		kitchen-sink is missing componets-shelving is damaged in refrigerator-					
		livingrm-window screen has hole greater than 1in					
54	500,226	*000028595*	SS3001	Joanne Emmons	460 Concord Street	3-1	07/31/2024
	Entered By:	**Ashley Pender**					
		Entire Unit - No Issues/Violations - Inspected-No Issues Were Found					
55	500,840	*000071145*	SS3008	John Pratt	480 Concord Street	3-8	07/31/2024
	Entered By:	**Ashley Pender**					
		bthrm-Light Fixture-Insufficient illumination in kitchen or bathroom					
		hallway and Kitchen-ceiling covering finishes- ceiling has an unstable surface					
		refridgerator seal is damage					
		kitchen-ventilation/Exhaust-exhaust system component is damaged- light out					
		Living room screen door is missing					
56	497,760	*000075981*	SS1001	Kelly J Obrien	586 Lakeview Avenue	1-1	01/29/2024
	Entered By:	**Ashley Pender**					
		Bathroom ceiling has an unstable surface					

57	500,941	*000075981*	SS1001	Kelly J Obrien	586 Lakeview Avenue	1-1	01/29/2024
	Entered By:	**Ashley Pender**					
		bthrm ceiling has an unstable surface					
58	500,221	*000073294*	SS4015	Kenneth Kendall	210 Hale Street	4-15	04/30/2024
	Entered By:	**Ashley Pender**					
		Kitchen - Cabinetry - More than 50% of cabinent compondents are missing, damaged, or inoperable					
		Main Entry - Door Surface-Entry - 1/4 inch or greater penetrative hole in door surface					
59	500,834	*000073294*	SS4015	Kenneth Kendall	210 Hale Street	4-15	06/20/2024
	Entered By:	**Wanda Bouras**					
		Kitchen- Cabinetry- More than 50% of cabinet components are missing, damaged or inoperable					
		Main Entry- Door Surface-Entry- (non-fire) - 1/4 inch or greater penetrative hole in door surface.					
60	500,936	*000056930*	SS3013	Kheang Am	245 Pleasant Street	3-13	07/31/2024
	Entered By:	**Ashley Pender**					
		kitchen-more than 50% of cabinets are missing or damaged					
		kitchen-Refrigorator-damaged shelves or draws					
61	492,097	*000066732*	SS1011	Luis Hiraldo	592 Lakeview Avenue	1-11	01/31/2024
	Entered By:	**Ashley Pender**					
		Electrical conductor is not properly insulated/enclosed					
		Smoke alarm does not produce an audio or visual alarm when tested					
62	497,846	*000050588*	SS5003	Maria E Ramon	106 Liberty Street	3	04/30/2024
	Entered By:	**Ashley Pender**					
		entry door frame threshold or trim is damaged or missing- bedrm					
		bthrm sink dripping					
		Refrigerator light hanging					
		Enrty door-a passage door compinent is damaged or missing					
		LVRM window-a unit window pane sash or frame is damaged or missing					
63	500,595	*000027361*	SS3004	Miguel A Alvarado	466 Concord Street	3-4	07/31/2024
	Entered By:	**Ashley Pender**					
		Bathroom 1 -Toilet - Toilet is not secured at base/loose					
		Bathroom 1 - Wall Covering and Finish-Interior					
64	500,832	*000080030*	SS4011	Miguel Angel Maldon	202 Hale Street	4-11	06/20/2024
	Entered By:	**Wanda Bouras**					
		Alternate Location- See Notes for Details- Guardrail- Guardrail is damaged- Front steps.					
65	500,813	*000074803*	SS4006	Nuoi Lieu	192 Hale Street	4-6	06/20/2024
	Entered By:	**Wanda Bouras**					
		*192 Hale Street- Bathroom 1- Bathtub/ Shower - Bath/shower bassin discolored on more than 50% of surface.					
		Bathroom 1- Floor Covering and Finishes- Floor components is not funtionally adequate.					
		Bathroom 1- GFCI/ AFCI- AFCI outlet or AFCI breaker reset button doesn not test (No visible damage)					
		Bathroom 1- Wall Covering and Finish-Interior - Interior wall has hole greater than 2in. - Multiple tiles missing					
		Kitchen- Refrigerator- General Comment- Light out					
66	500,009	*000074803*	SS4006	Nuoi Lieu	192 Hale Street	4-6	04/30/2024
	Entered By:	**Ashley Pender**					
		Bathroom 1 - Bathtub/Shower - Bath/shower basin discolored on more than 50% of surface					
		Bathroom 1 - Floor Covering & Finshes - Floor component (s) is not functionally adquate					
		Bathroom 1 - Wall Covering & Finish-Interior - Interior wall has hole greater than 2 in. - Multiple tiles missing					
		Kitchen - Refrigerator - General Comment - Light out					
67	500,005	*000087017*	SS4004	Pinakin Patel	188 Hale Street	4-4	04/30/2024
	Entered By:	**Ashley Pender**					
		Entire Unit - No Issues/Violations - Inspected-No Issues Were Found					
68	500,803	*000087017*	SS4004	Pinakin Patel	188 Hale Street	4-4	06/20/2024
	Entered By:	**Wanda Bouras**					
		No issues/violations- Inspected- No issues were found.					
69	500,828	*000070604*	SS4012	Raymond A Fauvel	204 Hale Street	4-12	06/20/2024

	Entered By:	**Wanda Bouras** *204 Hale Street- Bathroom 1- Floor Covering and Finishes- Subfloor is bowing, buckling, bulging, sagging, or misal Kitchen- Flammables or Combustibles- Combustibles/Flammable materials is on or within 3ft. of an appliance providi					
70	500,015	*000070604*	SS4012	Raymond A Fauvel	204 Hale Street	4-12	04/30/2024
	Entered By:	**Ashley Pender** Bathroom 1 - Floor Covering & Finshes - Subfloor is bowing, buckling, buldging, sagging, or misaligned within any r					
71	500,938	*000074467*	SS3016	Rich Gamester	251 Pleasant Street	3-16	07/31/2024
	Entered By:	**Ashley Pender** kitchen-cabinets-more than 50% are damaged or inoperable- floor components is not functional adequate					
72	494,363	*000026341*	SS5010	Rita S Goyette	106 Liberty Street	10	04/30/2024
	Entered By:	**Ashley Pender** check toilet tank. Tank wont fill up and wont flush Also hang up curtain rod in bathroom medicine cabinet needs to be replaced or repaired bthrm-1toilet componets are inoperable ktch- exhust system is damaged or missing					
73	500,217	*000086768*	SS4013	Shawn Oneil	206 Hale Street	4-13	06/20/2024
	Entered By:	**Ashley Pender** Bathroom 1 - Plumbing & Water Leaks - Plumbing Leaks					
74	495,579	*000086768*	SS4013	Shawn Oneil	206 Hale Street	4-13	06/20/2024
	Entered By:	**Ashley Pender** Pipe is leaking under bathroom sink					
75	492,100	*000068519*	SS1020	steven cintron	610 Lakeview Avenue	1-20	01/29/2024
	Entered By:	**Ashley Pender** smoke alarm foes not produce an audio pr visual alarm when tested					
76	500,149	*000067573*	SS3014	William Saunders Prir	247 Pleasant Street	3-14	07/31/2024
	Entered By:	**Wanda Bouras** Kitchen sink dripping. kitchen-Exhaust system component is damaged or missing-window will not stay open- livingrm-window has tear greater than 1in					
77	492,902	*000094337*	SS2005	WILSON NUNES	143 Lakeview Avenue	2-5	03/06/2024
	Entered By:	**Ashley Pender** A permanently installed light fixture is inoperable					
78	500,937	*000079778*	SS3015	Zachary Barrett	249 Pleasant Street	3-15	07/31/2024
	Entered By:	**Ashley Pender** kitchen-cabinets-for than 50% of components are missing or damaged -floor components is not functionally adequate living rm-floor not functionally adequate					

Summary Report for State Scattered Sites

Total Number of Days	=	**53**
Total Number of Worker Orders	=	**45**
Average Down Days	=	**1.18**

Annual Operating Budget

The tables on the following pages show the approved budget and actual income and spending per budget account (row) for the fiscal year ending 9/30/2025. It also shows the approved budget for the current year (2026) if there is one, and the percent change from last year's spending to this year's approved budget. The final column shows the current approved amount for each account divided by the number of housing units and by 12 months to show the amount per unit per month (PUM). The chart does not show a draft budget for the coming fiscal year as that will typically be developed in the final month of the fiscal year.

The budget format and accounts are mandated by the Executive Office of Housing and Livable Communities (EOHLC). For a better understanding of the accounts and discussion of special situations see the notes following the budget tables and the "Definitions of Accounts" at the end of this section.

The LHA maintains a consolidated budget (400-1) for all state-aided 667 (Elderly), 200 (family), and 705 (scattered site family) developments owned by the LHA. It does not maintain separate budgets for each development.

Operating Reserve

The LHA's operating reserve is the amount of funds that an LHA sets aside to sustain itself during lean years, or to remedy urgent health and safety concern or address deferred maintenance items. In addition, while EOHLC approves a fixed non-utility operating budget level for every LHA (called the Allowable Non-Utility Expense Level, or ANUEL), LHAs can propose a budget that exceeds that level, with the additional cost to be funded from the Operating Reserve, as long as the reserve will still remain above the minimum threshold set by EOHLC.

EOHLC defines a full (100%) Operating Reserve (OR) amount to be equal to one-half of the previous year's operating expenses and requires LHAs to maintain a minimum OR of 35% of this amount to cover any unplanned but urgent needs that may arise during the year and that can't be funded by the operating budget. If the reserve is between 20% and 35% of the full level, the LHA must obtain prior written approval from EOHLC to spend reserve funds, unless the expense is to resolve a health and safety issue. If the reserve is below the 20% level, the LHA can only spend OR funds on health and safety issues. In both cases, the LHA should address the health and safety issue immediately but must retroactively inform EOHLC and obtain its approval.

The LOWELL HOUSING AUTHORITY operating reserve at the end of fiscal year 2025 was $0.00, which is 0.00% of the full reserve amount defined above.

Consolidated Budget (400-1) for all state-aided 667 (Elderly), 200 (family), and 705 (scattered site family) developments owned by LOWELL HOUSING AUTHORITY						
REVENUE						
Account Number	Account Class	2025 Approved Revenue Budget	2025 Actual Amounts Received	2026 Approved Revenue Budget	% Change from 2025 Actual to 2026 Budget	2026 Dollars Budgeted Per Unit per Month
3110	Shelter Rent -Tenants	694,000.00	679,043.00	680,000.00	0.10%	429.29
3111	Shelter Rent - Tenants - Fraud/Retroactive	0.00	0.00	0.00	0.00%	0.00
3115	Shelter Rent -Federal Section 8\MRVP One-time Leased up Rev.	0.00	0.00	0.00	0.00%	0.00
3190	Nondwelling Rentals	0.00	0.00	0.00	0.00%	0.00
3400	Administrative Fee - MRVP	0.00	0.00	0.00	0.00%	0.00
3610	Interest on Investments - Unrestricted	160,000.00	166,317.00	160,000.00	-3.80%	101.01
3611	Interest on Investments - Restricted	0.00	0.00	0.00	0.00%	0.00
3690	Other Revenue	1,125.00	0.00	2,250.00	100.00%	1.42
3691	Other Revenue - Retained	54,000.00	98,011.00	54,944.00	-43.90%	34.69
3692	Other Revenue - Operating Reserves	0.00	0.00	0.00	0.00%	0.00
3693	Other Revenue - Energy Net Meter	0.00	0.00	0.00	0.00%	0.00
3801	Operating Subsidy - EOHLC (4001)	1,059,056.00	1,002,452.00	1,222,282.00	21.90%	771.64
3802	Operating Subsidy - MRVP Landlords	0.00	0.00	0.00	0.00%	0.00
3803	Restricted Grants Received	0.00	0.00	0.00	0.00%	0.00
3920	Gain/Loss From Sale/Disp. of Prop.	0.00	0.00	0.00	0.00%	0.00
3000	TOTAL REVENUE	1,968,181.00	1,945,823.00	2,119,476.00	8.90%	1,338.05

Consolidated Budget (400-1) for all state-aided 667 (Elderly), 200 (family), and 705 (scattered site family) developments owned by LOWELL HOUSING AUTHORITY

EXPENSES

Account Number	Account Class	2025 Approved Revenue Budget	2025 Actual Amounts Received	2026 Approved Revenue Budget	% Change from 2025 Actual to 2026 Budget	2026 Dollars Budgeted Per Unit per Month
4110	Administrative Salaries	254,605.00	202,188.00	277,646.00	37.30%	175.28
4120	Compensated Absences	0.00	0.00	0.00	0.00%	0.00
4130	Legal	0.00	0.00	1,000.00	100.00%	0.63
4140	Members Compensation	0.00	0.00	0.00	0.00%	0.00
4150	Travel & Related Expenses	0.00	0.00	100.00	100.00%	0.06
4170	Accounting Services	0.00	0.00	0.00	0.00%	0.00
4171	Audit Costs	5,500.00	5,670.00	3,575.00	-36.90%	2.26
4180	Penalties & Interest	0.00	0.00	0.00	0.00%	0.00
4190	Administrative Other	87,281.00	92,931.00	96,333.00	3.70%	60.82
4191	Tenant Organization	0.00	0.00	0.00	0.00%	0.00
4100	TOTAL ADMINISTRATION	347,386.00	300,789.00	378,654.00	25.90%	239.05
4310	Water	70,000.00	89,620.00	101,469.00	13.20%	64.06
4320	Electricity	120,000.00	112,747.00	129,915.00	15.20%	82.02
4330	Gas	45,000.00	35,076.00	40,065.00	14.20%	25.29
4340	Fuel	0.00	0.00	0.00	0.00%	0.00
4360	Net Meter Utility Debit/Energy Conservation	45,000.00	64,982.00	54,944.00	-15.40%	34.69
4390	Other	0.00	0.00	0.00	0.00%	0.00
4391	Solar Operator Costs	29,000.00	44,127.00	43,100.00	-2.30%	27.21
4392	Net Meter Utility Credit (Negative Amount)	-74,000.00	-109,108.00	-98,044.00	-10.10%	-61.90
4300	TOTAL UTILITIES	235,000.00	237,444.00	271,449.00	14.30%	171.37

Consolidated Budget (400-1) for all state-aided 667 (Elderly), 200 (family), and 705 (scattered site family) developments owned by LOWELL HOUSING AUTHORITY						
EXPENSES						
Account Number	Account Class	2025 Approved Revenue Budget	2025 Actual Amounts Received	2026 Approved Revenue Budget	% Change from 2025 Actual to 2026 Budget	2026 Dollars Budgeted Per Unit per Month
4410	Maintenance Labor	215,717.00	218,286.00	232,763.00	6.60%	146.95
4420	Materials & Supplies	107,400.00	118,869.00	106,600.00	-10.30%	67.30
4430	Contract Costs	212,500.00	242,078.00	185,635.00	-23.30%	117.19
4510	Insurance	59,465.00	59,466.00	68,832.00	15.80%	43.45
4520	Payment in Lieu of Taxes	17,525.00	17,483.00	17,483.00	0.00%	11.04
4540	Employee Benefits	217,419.00	4,454.00	196,940.00	4321.60%	124.33
4541	Employee Benefits - GASB 45	0.00	95,191.00	0.00	-100.00%	0.00
4542	Pension Expense - GASB 68	0.00	156,402.00	0.00	-100.00%	0.00
4570	Collection Loss	65,000.00	197,994.00	30,000.00	-84.80%	18.94
4571	Collection Loss - Fraud/Retroactive	0.00	0.00	0.00	0.00%	0.00
4580	Interest Expense	0.00	0.00	0.00	0.00%	0.00
4590	Other General Expense	6,000.00	34,980.00	9,600.00	-72.60%	6.06
4500	TOTAL GENERAL EXPENSES	365,409.00	565,970.00	322,855.00	-43.00%	203.82
4610	Extraordinary Maintenance	0.00	0.00	0.00	0.00%	0.00
4611	Equipment Purchases - Non Capitalized	20,000.00	0.00	20,000.00	100.00%	12.63
4612	Restricted Reserve Expenditures	0.00	0.00	0.00	0.00%	0.00
4715	Housing Assistance Payments	600,000.00	662,527.00	600,000.00	-9.40%	378.79
4801	Depreciation Expense	0.00	174,984.00	0.00	-100.00%	0.00
4600	TOTAL OTHER EXPENSES	620,000.00	837,511.00	620,000.00	-26.00%	391.41
4000	TOTAL EXPENSES	2,103,412.00	2,520,947.00	2,117,956.00	-16.00%	1,337.09

Consolidated Budget (400-1) for all state-aided 667 (Elderly), 200 (family), and 705 (scattered site family) developments owned by LOWELL HOUSING AUTHORITY						
SUMMARY						
Account Number	Account Class	2025 Approved Revenue Budget	2025 Actual Amounts Received	2026 Approved Revenue Budget	% Change from 2025 Actual to 2026 Budget	2026 Dollars Budgeted Per Unit per Month
3000	TOTAL REVENUE	1,968,181.00	1,945,823.00	2,119,476.00	8.90%	1,338.05
4000	TOTAL EXPENSES	2,103,412.00	2,520,947.00	2,117,956.00	-16.00%	1,337.09
2700	NET INCOME (DEFICIT)	-135,231.00	-575,124.00	1,520.00	-100.30%	0.96
7520	Replacements of Equip. - Capitalized	0.00	0.00	0.00	0.00%	0.00
7540	Betterments & Additions - Capitalized	0.00	0.00	0.00	0.00%	0.00
7500	TOTAL NONOPERATING EXPENDITURES	0.00	0.00	0.00	0.00%	0.00
7600	EXCESS REVENUE OVER EXPENSES	-135,231.00	-575,124.00	1,520.00	-100.30%	0.96

Explanation of Budget Accounts

The following explains how each of the line items is to be prepared.

3110: Shelter Rent: The shelter rent projection should be based on the current rent roll plus anticipated changes expected from annual rent re-determinations or as a result of regulatory amendments.

3111: Shelter Rent – Tenants - Fraud/Retroactive: This account should be used for the reporting of total rent receipts from residents due to unreported income. These are often called fraud or retroactive balances. In cases where deficit LHAs discover, pursue cases, and have entered into a written fraud/retroactive re-payment agreement **with a present or former tenant who did not report income,** the LHA will be allowed to retain two-thirds of the funds recovered. One third of the total dollar amount recovered should be included in the LHA's quarterly or year-end Operating Statement as Shelter Rent, account #3111, and two-thirds of this total dollar amount should be included in Other Revenue-Retained, account #3691.

3115: Shelter Rent - Section 8: This account applies only to those developments receiving support through the federal government's Housing and Urban Development (HUD) Section 8 New Construction and/or Substantial Rehab Programs.

3190: Non-Dwelling Rental: This account should be credited with the rents, other than tenants rents reported in line 3110 and 3115, including charges for utilities and equipment, billed to lessees of non-dwelling facilities as well as apartments rented for non-dwelling purposes, such as social service programs.

3400: Administrative Fee- MRVP/AHVP: This account should be credited with Administrative Fees to be received for the MRVP/AHVP Program. The MRVP/AHVP administrative fee is $50.00 per unit per month, as of July 1, 2020.

3610: Interest on Investments – Unrestricted: This account should be credited with interest earned on unrestricted administrative fund investments.

3611: Interest on Investments – Restricted: This account should be credited with interest earned on restricted administrative fund investments. For example, an LHA may receive a grant whose use is restricted to a specific purpose, and the interest income earned on that grant may also be restricted to the same purpose.

3690: Other Operating Revenues: This account should be credited with income from the operation of the project that cannot be otherwise classified. Income credits to this account include, but are not limited to, penalties for delinquent payments, rental of equipment, charges for use of community space, charges to other projects or programs for the use of central office management and maintenance space, commissions and profits from vending machines, including washing machines, and certain charges to residents for additional services, materials, and/or repairs of damage caused by neglect or abuse in accordance with the Department's regulations on lease provisions..

3691: Other Revenue – Retained: This account should be credited with certain miscellaneous revenue to be retained by the LHA, and which is not used to reduce the amount of operating subsidy the LHA is due. The most common examples for this account is receipts for the rental of roof antennas to cell phone providers and net meter credits earned on electricity bills from Net Meter Power Purchase Agreements (PPA's). Generally, surplus LHAs may retain 100% of these savings and deficit LHAs may retain 25% of the savings, with the 75% balance used to offset its need for operating subsidy. However, for the period 7/1/16 through 6/30/20, all deficit LHAs may keep 100% of the net meter credit savings, while they can keep 50% effective 7/1/2020.

3692: Other Revenue - Operating Reserves: This account should be credited with funds that LHAs plan to utilize from their operating reserve accounts in excess of the Allowable Non-Utility Expense Level (ANUEL). To be approvable, LHA must maintain the EOHLC prescribed operating reserve minimum level after deducting the amount budgeted. The only exception to this is when the expenses are for health and safety issues.

3693: Other Revenue – Net Meter: This account should normally be credited with 75% of the total net meter credit savings realized by a deficit LHA, while surplus LHAs with net meter credit savings would enter $0 here. Savings are calculated as the value of the net meter credits appearing on the LHA's electric bills (or, in some cases, paid in cash to the LHA by their utility company), minus the cost of the payments made to the solar power developer under their Power Purchase Agreement (PPA). Deficit LHAs normally may retain 25% of the savings. That amount should be included as Other Revenue – Retained on line #3691. However, please note that for the period 7/1/16 through 6/30/20 all LHAs may retain 100% of their total net meter credit savings, and should report those savings as Other Revenue – Retained on line #3691. LHAs can keep 50% of savings effective 7/1/2020.

3801: Operating Subsidy – EOHLC (400-1): This account represents all state-funded operating subsidy to be received and or to be earned for the fiscal year. At the end of each fiscal year, this account will be adjusted in the operating statement to equal the actual subsidy earned by the LHA.

3802: Operating Subsidy – MRVP/AHVP Landlords:

The credit balance in this account represents the anticipated total receipts from EOHLC during the fiscal year for housing assistance payments to landlords. At the end of each fiscal year this account will be adjusted to equal the actual subsidy earned.

3920: Gain/Loss from Sale or Disposition of Property (Capitalized or Non-Capitalized): The debit or credit balance of this account represents the following items: a) Cash proceeds from the sale of property that was either: 1) non-capitalized; or 2) capitalized and has been fully depreciated, and b) Realized gain or loss from the sale or disposition of capitalized properly that has not been fully depreciated.

4110: Administrative Salaries: This account should be charged with the gross salaries of LHA personnel engaged in administrative duties and in the supervision, planning, and direction of maintenance activities and operating services during the operations period. It should include the salaries of the executive director, assistant executive director, accountants, accounting clerks, clerks, secretaries, project managers, management aides, purchasing agents, engineers, draftsmen, maintenance superintendents, and all other employees assigned to administrative duties.

4120: Compensated Absences: The debit balance in this account represents the actual cost incurred during the fiscal year for vacation, paid holidays, vested sick leave and earned compensatory time. This account includes both the direct compensated absences cost and associated employer payroll expenses (employment taxes, pension cost, etc.).

4130: Legal Expense: This account should be charged with retainers and fees paid to attorneys for legal services relating to the operation of the projects.

4140: Compensation to Authority Members: A local authority may compensate its members for performance of their duties and such other services as they may render to the authority in connection with its Chapter 200 development(s). Compensation for any other program is not authorized. Because of this, LHAs must base such compensation only on the actual rent receipts for these developments plus a prorated share of other operating receipts of funds on a per unit basis. The precise amount that members may be compensated is defined by statute to a maximum of $40 per member per day, and $50 for the chairperson per day. The total of all compensation to all board members is not to exceed two percent (2%) of actual gross income of Chapter 200 developments in any given year, consistent with the approved budget amount. In no case shall the payment of compensation exceed $12,500 annually for the chairperson, or $10,000 for any member other than the chairperson. Please note the statute requires the member to perform housing authority business in order to receive compensation.

4150: Travel and Related Expense: Legitimate travel expenses incurred by board members and staff in the discharge of their duties for any **state-aided program** are reimbursable from this account, as consistent with Department policy.

4170: Contractual Accounting Services: Fees for accounting services that are provided routinely and are contracted for on an annual basis. Only accounting services performed on a contractual basis (fee accountant) should be included in this item. Full or part-time LHA accounting staff that provides routine accounting services should be included in Account 4110, Administrative Salaries.

4171: Audit Costs: This account includes the state program's prorated share of audit fees paid to an Independent Public Accountant (IPA). The procurement of an IPA is necessary to satisfy the Federal Government's audit requirements. Costs for these services should be shared with all state and federal programs of LHA. **Audit costs are to be absorbed within the ANUEL.** The new Agreed Upon procedures (AUP) audit costs for state-assisted public housing programs should also be included in this account.

4180: Penalties and Interest: Any expenses incurred from penalties, fees, and interest paid on delinquent accounts shall be included in this line item.

4190: Administrative Other: This account is provided for recording the cost of administrative items for which no specific amount is prescribed in this 4100 group of accounts. It includes, but is not limited to, the cost of such items as: reports and accounting forms; stationery and other office supplies; postage; telephone services; messenger service; rental of office space; advertising for bids; publications; membership dues; collection agency & court costs, training costs; management fees, and fiscal agent fees.

4191: Tenant Organization: LTO Funding by the LHA. Upon request the LHA shall fund all LTOs in a city or town at the annual rate of $6.00 per state-aided public housing unit occupied or available for occupancy by residents represented by such LTO(s) or an annual total of $500.00 prorated among all such LTO(s), whichever is more. For more information on the creation and funding of LTOs see 760 CMR 6.09.

Authorities which operate computer learning centers, which are funded by the state consolidated budget or by other sources (which are typically recorded in line #3691 as "Other Revenue Retained", should budget the cost of the centers on this line.

4310: Water: This account should be charged with the cost of water and sewer charges purchased for all purposes.

4320: Electricity: This account should be charged with the total cost of electricity purchased for all purposes. Many LHAs have entered into Net Meter Credit Power Purchase Agreements (PPA's). In these deals, an LHA executes a contract with a solar power developer who constructs and owns an off- site solar electricity- generating site. In exchange for contracting to purchase a percentage of the solar power produced, the LHA receives a credit on its utility electric bill for each KWH purchased or in some cases receives a direct cash payment from their utility company. Please ensure that the amount charged to this account is the total cost of electricity BEFORE any reductions due to the receipt of net meter credits.

4330: Gas: This account should be charged with the cost of gas (natural, artificial, or liquefied) purchased for all purposes.

4340: Fuel: This account should be charged with the cost of coal, fuel oil, steam purchased, and any other fuels (except electricity and gas) used in connection with Local Housing Authority operation of plants for the heating of space or water supplied to tenants as a part of rent.

4360: Net Meter Utility Debit/Energy Conservation: This account is to be charged with costs incurred for energy conservation measures.

4390: Other Utilities: This account should be charged with the cost of utilities which are not provided for in accounts 4310 through 4360. In addition, for all quarterly or year-end operating statements 9/30/20 or later, and all budgets 6/30/21 or later, please use this line to record the total net meter credits earned as reported in Line 4392, MINUS the Solar Operator Costs reported in Line 4391, with the result expressed as a positive number. For example, if you reported -$20,000 in Net Meter Utility Credits in Line 4392 and $15,000 in Solar Operator Costs in Line 4391, you would subtract the $15,000 reported on Line 4391 from the -$20,000 reported on Line 4392, and post the remainder of $5,000 on Line 4360, as a positive number. This number essentially represents the "net" savings the LHA earned from its net meter credit contract.

4391: Solar Operator Costs: Many LHAs have entered into Net Meter Credit Power Purchase Agreements (PPA's). In these deals, an LHA executes a contract with a solar power developer who constructs and owns an off-site solar electricity-generating site. The LHA makes regular (usually monthly) payments to the developer for its contracted share of the solar electricity produced by the site. Those payments should be entered in this account.

4392: Net Meter Utility Credit (Negative Amount): As noted in account #4391 above, many LHAs have executed Net Meter Credit Power Purchase Agreements (PPA's). In exchange for contracting to purchase a percentage of the solar power produced, the LHA receives a credit on its utility electric bill for each KWH purchased from the developer, which reduces the balance on its electric bill, or, in some cases, the credits are paid in cash to the LHA by the utility company. The total gross amount of the net meter credits that appear on the LHA's utility bills should be carried in this account and entered as a negative number. In cases where credits are paid in cash to the Host LHA, the net balance after paying out the amounts due the participating housing authorities, should also be carried in this account and entered as a negative number.

4410: Maintenance Labor: This account should be charged with the gross salaries and wages, or applicable portions thereof, for LHA personnel engaged in the routine maintenance of the project.

4420: Materials & Supplies: This account should be charged with the cost of materials, supplies, and expendable equipment used in connection with the routine maintenance of the project. This includes the operation and maintenance of automotive and other movable equipment, and the cost of materials, supplies, and expendable equipment used in connection with operating services such as janitorial services, elevator services, extermination of rodents and household pests, and rubbish and garbage collection.

4430: Contract Costs: This account should be charged with contract costs (i.e. the cost of services for labor, materials, and supplies furnished by a firm or by persons other than Local Authority employees) incurred in connection with the routine maintenance of the project, including the maintenance of automotive and other movable equipment. This account should also be charged with contract costs incurred in connection with such operating services as janitorial services, fire alarm and elevator service, extermination of rodents and household pests, rubbish and garbage collection, snow removal, landscape services, oil burner maintenance, etc.

4510: Insurance: Includes the total amount of premiums charged all forms of insurance. Fire and extended coverage, crime, and general liability are handled by EOHLC on a statewide basis. All other necessary insurance policies include: Workers' Compensation, boiler, vehicle liability and owner, etc.

4520: Payments in Lieu of Taxes:

This account should be charged with all payments in lieu of taxes accruing to a municipality or other local taxing body.

4540: Employee Benefits: This account should be charged with local housing authority contributions to employee benefit plans such as pension, retirement, and health and welfare plans. It should also be charged with administrative expenses paid to the State or other public agencies in connection with a retirement plan, if such payment is required by State Law, and with Trustee's fees paid in connection with a private retirement plan, if such payment is required under the retirement plan contract.

Employee benefits are based upon a given percentage of the total payroll; therefore, the total amount approved in this account will be based on the approved budgeted salaries representing the state's fair share.

4541: Employee Benefits - GASB 45: This line covers "Other Post-Employment Benefits" (OPEB). Of the total benefits offered by employers to attract and retain qualified employees, some benefits, including salaries and active-employee healthcare are taken while the employees are in active service, whereas other benefits, including post-employment healthcare and other OPEB are taken after the employees' services have ended. Nevertheless, both types of benefits constitute compensation for employee services. In accordance with required accounting practices, this amount is not projected in the budget (and is therefore blank) but the estimated future costs of this item is carried in the operating statement.

4542: Pension Expense – GASB 68: The primary objective of GASB 68 Statement is to improve accounting and financial reporting for pension costs. It also improves information provided by state and local governmental employers about financial support for pensions that is provided by other entities. As with account 4541 above, in accordance with required accounting practices, this amount is not projected in the budget (and is therefore blank) but the estimated future costs of this item is carried in the operating statement.

4570: Collection Loss: The balance in this account represents the estimated expense to cover unexpected losses for tenant rents. Note: Do not include losses from fraud/retroactive balances here. Report them in Account 4571 – Collection Loss – Fraud/Retroactive.

4571: Collection Loss – Fraud/Retroactive: The balance in this account represents the estimated expense to cover unexpected losses for tenant rents due to unreported income, i.e. fraud/retroactive balances.

4580: Interest Expense: The debit balance in this account represents the interest expense paid and accrued on loans and notes payable. This debt can be from operating borrowings or capital borrowings.

4590: Other General Expense: This account represents the cost of all items of general expenses for which no specific account is prescribed in the general group of accounts.

4610: Extraordinary Maintenance – Non-Capitalized: This account should be debited with all *costs* (labor, materials and supplies, expendable equipment (such as many tools or routine repair parts), and contract work) of repairs, replacements (but not replacements of non-expendable equipment), and rehabilitation of such a substantial nature that the work is clearly not a part of the routine maintenance and operating program. The items charged to this account should not increase the useful life or value of the asset being repaired. These items are not capitalized and are not added as an increase to fixed assets at the time of completion. Nor are these items depreciated. An example of this would be scheduled repainting of apartments.

4611: Equipment Purchases – Non-Capitalized: This account should be debited with the costs of equipment that does not meet the LHA's criteria for capitalization. Because these items are being expended when paid, they should not be categorized as a fixed asset and therefore will not be depreciated. These items include stoves, refrigerators, small tools, most computers and software, etc.

The budget is a planning tool and as our portfolio ages it is essential that LHAs evaluate their properties annually and plan for extraordinary maintenance. To that end EOHLC very strongly recommends that for all 400-1 operating budgets, depending on the age of the portfolio and condition, LHAs spend between $100 and $500 a year per unit in Extraordinary Maintenance, Equipment Purchases, Replacement of Equipment, and Betterments & Additions to ensure that the aging public housing stock is preserved.

4715: Housing Assistance Payments: This account should be debited with all housing assistance payments paid to landlords for the MRVP program on a monthly basis.

4801: Depreciation Expense: This account should be debited with annual fixed asset depreciation expenses as determined by the LHA's capitalization policy.

7520: Replacement of Equipment – Capitalized: This account should be debited with the acquisition cost (only the net cash amount) of non-expendable equipment purchased as a replacement of equipment of substantially the same kind. These items, such as vehicles, computers, or furniture, meet the LHA's criteria for capitalization and will also be added to fixed assets and therefore depreciated over the useful life.

7540: Betterments & Additions – Capitalized: This account should be debited with the acquisition cost (only the net cash amount) of non-expendable equipment and major non-routine repairs that are classified as a betterment or addition. These items meet the LHA's criteria for capitalization and will also be added to fixed assets and therefore depreciated over the useful life of the asset. Examples are: major roof replacement, structural repairs such as siding, or major paving work.

In accordance with GAAP accounting, inventory purchases (Replacement of Equipment and Betterments & Additions) are distinguished between capitalized and non-capitalized items. Any inventory or equipment purchase greater than $5,000 is required by EOHLC to be capitalized, inventoried and depreciated. Any inventory or equipment purchase costing $1,000 to $4,999 should be inventoried by LHA staff for control purposes only but is not subject to capitalization or depreciation, it is, however, required to be expensed when the items are paid for. An LHA's inventory listing should include both capitalized and non-capitalized items of $1,000 and more, as well as all refrigerators and stoves of any value. All items that appear on the inventory listing should be tagged with a unique identification number, and all refrigerators and stoves (regardless of value) should be tagged. LHAs may adopt a capitalization policy that capitalizes inventory purchases at a lesser amount than the $5,000 requirement (i.e. $1,000 - $4,999); however, no capitalization policy can have an amount higher than $5,000. Any inventory or equipment purchases costing $0 to $999 are to be expensed when paid for.

Narrative Responses to the Performance Management Review (PMR) Findings

The Performance Management Review conducted by the Department of Housing and Community Development (EOHLC) for the LHA fiscal year resulted in the following ratings. Criteria which received a 'Corrective Action' rating show both a reason for the rating and a response by the LHA. The reason indicates the LHA's understanding of why they received the rating, while the responses describe their goals and the means by which they will meet or improve upon the performance-based assessment standards established by EOHLC in the PMR. When the PMR rating is 'Operational Guidance', the LHA may have responded, but was not required to.

Category: Management

Criterion: Occupancy Rate - the percentage of units that are occupied on monthly report.

Rating: Operational Guidance

Criterion: Tenant Accounts Receivable (TAR) - the percentage of uncollected rent and related charges owed by tenants to the local housing authority (LHA), out of the total amount of rent and related costs charged to tenants.

Rating: Corrective Action

Reason: The PMR revealed that LHA was one day late filing its submission for the quarter ending 9/30/2024.

Response: LHA is required to submit Tenant Accounts Receivables within sixty days of the quarter end. To ensure all reports are consistently submitted within this time period, calendar alerts have been set for finance department staff. In addition, Board meetings will be scheduled appropriately at year end to ensure all certifications are signed by the Board in a timely manner.

Criterion: Certifications and Reporting Submissions - timely submission of statements and certifications

Rating: Operational Guidance

Criterion: Completion of mandatory online board member training

Rating: Corrective Action

Reason: All LHA board members are required to complete Board Member Training as stated in Chapter 235 Section 5B. The PMR revealed that the training was not completed in a timely manner.

Response: To ensure that board members comply with statutory requirements:

- LHA will update the board attendance application with the most recent members and their terms and dates.
- LHA will ensure that each board member has a unique email for the board member training
- LHA will provide computer technical guidance and support to help board members complete the training.
- LHA has developed a tracking system with all board members training dates and the dates of the next training required. In addition, LHA has set calendar alerts to have all board members complete their training in accordance to EOHLC requirements.

Criterion: Annual Plan Submitted - Annual Plan (AP) submitted on time

Rating: No Findings

Criterion: Staff completed relevant certifications or trainings

Rating: No Findings

Category: Financial

Criterion: Adjusted Net Income - a measure of overspending or underspending.

Rating: Corrective Action

Reason: LHA is required to submit Operating Reserve (Operating Statements) within sixty days of the quarter end.

The PMR revealed that LHA was one day late filing its submission for the quarter ending 9/30/2024.

Response: LHA is required to submit Operating Statements within sixty days of the quarter end. To ensure all reports are consistently submitted within this time period, calendar alerts have been set for finance department staff. In addition, Board meetings will be scheduled appropriately at year end to ensure all certifications are signed by the Board in a timely manner.

Criterion: Current Operating Reserve as a percentage of total maximum reserve level.

Rating: Corrective Action

Reason: LHA is required to maintain a minimum operating reserve of 20% of the maximum reserve level. LHA's reserve level as of 9/30/2024 fell below the 20% minimum.

Response: LHA staff have carefully reviewed PHN 2019-01 and 2018-04, as well as current budget guidelines for guidance on Operating Reserve augmentation and new spending thresholds. LHA will work with their HMS to track and monitor all operating expenses in accordance with the notices.

Category: Capital Spending

Criterion: Timely spending of capital funds awarded under the Formula Funding program

Rating: No Findings

Category: CHAMP

Criterion: Paper applications are available, received and entered into CHAMP

Rating: No Findings

Criterion: Vacancies are recorded correctly and occupied using CHAMP

Rating: Corrective Action

Reason: We had a few mismatched entries between HAFIS Vacancy Report and CHAMP list pulls. Some were from a last-minute change in unit address that got missed, some were from data entry error typing the list pull number and/or applicant ID# into HAFIS. And a few were "no match" which could be administrative transfers mis-marked.

Response: We will institute a printed copy of each successful "housing" with all the needed information for the HAFIS Vacancy Report generated from CHAMP. This will be printed and given to the person in charge of recording the vacancy filled in HAFIS.

Criterion: Fair Housing Policies Uploaded

Rating: No Findings

Category: Facility Management - Inspection Standards and Practices

Criterion: 100% of units inspected during FYE under review

Rating: No Findings

Criterion: Unit inspection reports create, track, and report work orders for inspection repairs, and inspection WOs completed within 30 days or add to DM / CIP

Rating: No Findings

Criterion: Unit inspection reports accurately reflect necessary repairs

Rating: Operational Guidance

Category: Facility Management - Vacancy Turnover Standards and Practices

Criterion: Work orders created for every vacancy and completed within 30 days (or waiver requested)

Rating: No Findings

Criterion: Vacancy turnover work orders accurately reflect necessary repairs

Rating: No Findings

Category: Facility Management - Preventive Maintenance Standards and Practices

Criterion: LHA Preventive Maintenance Plan accurately reflects all necessary work to maximize life of LHA components

Rating: No Findings

Category: Facility Management - Work Order Types and Systems

Criterion: All emergency work orders are created, tracked, reported and completed within 48 hours

Rating: No Findings

Criterion: All requested work orders are created, tracked, reported and completed within 14 days or added to DM/CIP

Rating: No Findings

Additional comments regarding the PMR:

Explanation of PMR Criteria Ratings

CRITERION	DESCRIPTION
Management	
Occupancy Rate	The rating is calculated using the following formula: (Total Number of Occupied units on Monthly Report divided by (Total Number of Units Minus Units that Received a Waiver Minus Number of Units Vacant less than 30 days on Monthly Report) • "No Findings" : Occupancy Rate is at or above 98% • Operational Guidance: Occupancy rate is at 95% up to 97.9% • Corrective Action: Adjusted occupancy rate is less than 95%
Tenant Accounts Receivable (TAR)	This criterion calculates the percentage of uncollected rent and related charges owed by starting with the amount reported by the LHA, as uncollected balances for the TAR (Account 1122 from the Balance Sheet) minus Normal Repayment Agreements* divided by Shelter (Tenant) Rent (account 3110 from the Operating Statement) • "No Findings" : At or below 2% • "Operational Guidance": More than 2% , but less than 5% • "Corrective Action": 5% or more
Certifications and Reporting Submissions	Housing authorities are required to submit 4 quarterly vacancy certifications by end of the month following quarter end; 4 quarterly operating statements and 4 Tenant Accounts Receivable (TAR) reports within 60 days of quarter end. • "No Findings": At least 11 of the required 12 reports were submitted and at least 9 were submitted on time. • "Operational Guidance": Less than 11 of the required 12 reports were submitted and/or less than 9 were submitted on time.
Board Member Training	Percentage of board members that have completed the mandatory online board member training. • "No Findings" : 80% or more completed training • "Operational Guidance" : 60-79.9% completed training • "Corrective Action" : <60 % completed training
Staff Certifications and Training	Each LHA must have at least one staff member complete a relevant certification or training During the fiscal year. The number of required trainings varies by LHA size. • No Findings: LHAs completed the required number of trainings Corrective Action: LHAs have not completed any trainings
Annual Plan (AP) Submitted	Housing authorities are required to submit an annual plan every year. • "No Findings" =Submitted on time • "Operational Guidance" =Up to 45 days late • "Corrective Action" =More than 45 days late

CRITERION	DESCRIPTION
CHAMP	
Paper applications	Paper applications are available, received and entered into CHAMP • No Findings: Paper applications are available; And paper applications are date and time stamped correctly; And 90% of new paper applications are entered into CHAMP within 15 calendar days of date/time stamp; And 2% or less of new paper applications are entered more than 30 days after date/time stamp • Operational Guidance: Paper applications are available; And paper applications are date and time stamped and entered correctly; And 75% - 89% of new paper applications are entered into CHAMP within 15 calendar days; And 3% - 5% of new paper applications are entered more than 30 days after date/time stamp • Corrective Action: Paper applications are not available; Or the LHA has failed to date and time stamp paper applications and/or failed to enter them correctly; Or Less than 75% of new paper applications are entered into CHAMP within 15 calendar days of date/time stamp; Or more than 5% of new paper applications are entered more than 30 days after date/time stamp
Vacancies occupied using CHAMP	Vacancies are recorded correctly and occupied using CHAMP • No Findings: All vacancies during the fiscal year are recorded in EOHLC's Housing Applications Vacancy System within 30 days; And the housed Applicant ID and Pull List ID match between EOHLC's Housing Applications Vacancy System and CHAMP for unit occupied during the fiscal year, excluding administrative transfers; And 25% or less of occupied units have data entry errors • Operational Guidance: All vacancies during the fiscal year are recorded in EOHLC's Housing Applications Vacancy System, all vacancies are not recorded within 30 days; Or the Housed Applicant ID and Pull List ID match between EOHLC's Housing Applications Vacancy System and CHAMP for units occupied during the fiscal year, excluding administrative transfers; And greater than 25% of occupied units have data entry errors • Corrective Action: All vacancies during the fiscal year are not recorded in EOHLC's Housing Applications Vacancy System; Or the Housed Applicant ID and Pull List ID do not match (or data is missing) between EOHLC's Housing Applications Vacancy System and CHAMP for units occupied during the fiscal year, excluding administrative transfers

CRITERION	DESCRIPTION
Financial	
Adjusted Net Income	The Adjusted Net Income criterion calculation starts with an LHA's Net Income and subtracts Depreciation, GASB 45 (Retirement Costs), GASB 68 (Retirement Costs), Extraordinary Maintenance (maintenance expense outside of routine/ordinary expenses), and Equipment Purchases – Non Capitalized. This Adjusted Net Income amount is then divided by the Total Expenses of the LHA. If this Adjusted Net Income amount is positive, it means underspending and if it is negative it means overspending. Underspending Rating: • "No Findings" : 0 to 9.9% • "Operational Guidance": 10 to 14.9% • "Corrective Action": 15% or higher Overspending Rating: • "No Findings" : 0 to -4.9% • "Operational Guidance": -5% to -9.9% • "Corrective Action": -10% or below
Operating Reserves	Current Operating Reserve as a percentage of total maximum reserve level. Appropriate reserve level is buffer against any unforeseen events or expenditures. • "No Findings" :35%+ of maximum operating reserve • "Operational Guidance": 20% to 34.9% of maximum operating reserve • "Corrective Action": <20% of maximum operating reserve
Capital Planning	
Capital Spending	Under the Formula Funding Program (FF), authorities receive undesignated funds to spend on projects in their Capital Improvement Plan. They are rated on the percentage of available funds they have spent over a three-year period • "No Findings" = at least 80% • "Operational Guidance" = At least 50% • "Corrective Action" = Less than 50%
Health & Safety	
Health & safety violations	EOHLC has observed conditions at the LHA's developments and reported health and safety violations. The LHA has certified the number of corrected violations in each category.

CRITERION	DESCRIPTION
Facility Management – Inspection Standards and Practices	
100% Unit Inspections	All units inspected at LHA during FY under review • No Findings: 100% of units inspected • Corrective Action: Less than 100% of units inspected
LHA Inspections Reports/Work Orders	Unit inspection reports create, track, and report work orders for inspection repairs, and inspection WOs completed within 30 days or add to DM/CIP • No Findings: All inspection work orders/lease violations are created, tracked, and reported; And non-health and safety work orders for inspection repairs/lease violations are completed within 30 days or added to DM/CIP; And health and safety work orders for inspection repairs/lease violations are addressed within 48 hours • Operational Guidance: All health and safety inspection work orders/lease violations are created, tracked, reported and completed within 48 hours; And LHA fail to create, track, or report no more than 1 or 2 (based on LHA size) non-EHS (exigent health and safety) deficiencies; Or LHA failed to complete any non-EHS work orders/lease violations appropriately • Corrective Action: Any EHS work orders/lease violations not created, tracked, reported, or completed; Or 1 of the following: LHA failed to create, track or report a) More than 1 non-EHS deficiency (small LHA); b) More than 2 non-EHS deficiencies (Medium/Large)
Accuracy of LHA Inspections	Unit inspection reports accurately reflect necessary repairs • No Findings: c.667 unit has less than 2 EHS deficiencies and c.200/705 unit has less than 3 EHS deficiencies • Operational Guidance: c.667 unit has 2 EHS deficiencies or c.200/705 has 3 EHS deficiencies • Corrective Action: c.667 has equal to or greater than 3 EHS deficiencies or c.200/705 unit has equal to or greater than 4 EHS deficiencies
Facility Management – Preventative Maintenance Standards and Practices	
LHA Preventative Maintenance Schedule Accuracy and Implementation of Preventative Schedules	LHA preventative maintenance schedule accurately reflects all necessary work to maximize the life of LHA components • No Findings: c.667 unit less than 2 EHS deficiencies and c.200/705 less than 3 EHS deficiencies • Operational Guidance: c.667 2 EHS deficiencies or c.200/705 3 EHS deficiencies • Corrective Action: c.667 equal to or greater than 3 EHS deficiencies or c.200/705 equal to or greater than 4 EHS deficiencies

CRITERION	DESCRIPTION
Facility Management – Vacancy Turnover Standards and Practices	
Vacancy Turnover Work Orders	Work orders created for every vacancy and completed within 30 days (or waiver requested) • No Findings: Vacancy work orders are created, tracked and reported for every unit and reflect all work in unit; And Vacancy work orders are Maintenance Ready in <=30 days for c.667 units or <=45 days for c.200/705 units or have approved waiver • Operational Guidance: Vacancy work orders are created, tracked and reported for every unit; And work orders do not reflect all work completed in unit; Or vacancy work orders are Maintenance Ready in 31-45 days for c.667 and 46-60 days for c.200/705 and no approved waiver • Corrective Action: Vacancy work orders are not created, tracked and reported for every unit; Or vacancy work orders are Maintenance Ready in >45 days for c.667 and >60 days for c.200/705 and have no approved waiver
Accuracy and Standard of Vacancy Turnovers	Vacancy turnover work orders accurately reflect necessary repairs • No Findings: c.667 unit less than 2 EHS deficiencies and c.200/705 less than 3 EHS deficiencies • Operational Guidance: c.667 2 EHS deficiencies or c.200/705 3 EHS deficiencies • Corrective Action: c.667 equal to or greater than 3 EHS deficiencies or c.200/705 equal to or greater than 4 EHS deficiencies
Work Order Types and Systems	
Emergency Work Orders	All emergency work orders are created, tracked, reported and completed within 48 hours • No Findings: All emergency work orders under review are created, tracked, reported and completed within 48 hours • Operational Guidance: All emergency work orders completed within 48 hours; Less than 100% but greater than or equal to 80% of work orders under review are correctly created, tracked and reported administratively • Corrective Action: Not all emergency work orders are completed within 48 hours; Or less than 80% of work orders under review are correctly created, tracked and reported administratively
CRITERION	**DESCRIPTION**
Requested Work Orders	All requested work orders are created, tracked, reported and completed within 14 days or added to DM/CIP • No Findings: All requested work orders under review are created, tracked, and reported; All work is complete within 14 days or added to DM/CIP • Operational Guidance: All requested work orders completed within 14 days or added to DM/CIP; And less than 100% of work orders under review are correctly created, tracked and reported • Corrective Action: Not all requested work orders are completed within 14 days or added to DM/CIP

Policies

The following policies are currently in force at the LOWELL HOUSING AUTHORITY:

Policy	Last Ratified by Board Vote	Notes
*Capitalization Policy	7/12/2017	
*Fair Housing Marketing Plan	10/12/2022	
*Grievance Policy	3/1/2017	
*Language Access Plan	10/12/2022	
*Personnel Policy	9/25/2024	
*Procurement Policy	7/1/2017	
*Reasonable Accommodations Policy	10/12/2022	
*Rent Collection Policy	4/12/2023	
Anti-Discriminatory Harassment Policy	1/1/2012	
Criminal Offender Records Information (CORI) Policy	3/1/2007	
Maintenance and Other Charges	4/17/2024	
Other – Define in the 'Notes' column	2/1/2014	Resident Use of Property
Other – Define in the 'Notes' column	2/1/2014	Fence Policy
Other – Define in the 'Notes' column	4/17/2024	Heat, Smoke Detector and Carbon Monoxide Detector Policy
Other – Define in the 'Notes' column	6/1/2008	Pest Policy
Other – Define in the 'Notes' column	4/17/2024	Air Conditioner Policy
Other – Define in the 'Notes' column	3/1/2017	VAWA Emergency Transfer Plan
Other – Define in the 'Notes' column	4/17/2024	OSHA
Other – Define in the 'Notes' column	4/17/2024	Snow Removal Policy
Other – Define in the 'Notes' column	6/12/2024	Outdoor Storage Policy
Parking	4/1/2013	
Pet Policy	2/1/2018	
Smoking Policy	2/1/2018	

* Starred policies are required by EOHLC. Policies without a "Latest Revision" date are not yet in force. The list of policies has been provided by the LHA and has not been verified by EOHLC.

Waivers

LOWELL HOUSING AUTHORITY has received the following waivers from EOHLC's regulations. This list does not include vacancy waivers, pet waivers, or any waivers that would release personally identifiable tenant or applicant data.

Description	Reason	Date Approved by EOHLC	Date Expired

*The list of waivers has been provided by the LHA and has not been verified by EOHLC.

Glossary

ADA: Americans with Disabilities Act. Often used as shorthand for accessibility related issues or improvements.

AHVP: Alternative Housing Voucher Program

Alternative Housing Voucher Program provides rental vouchers to disabled applicants who are not elderly and who have been determined eligible for Chapter 667 (elderly and disabled) housing.

Allowable Non-Utility Expense Level (ANUEL) is the amount of non-utility expense allowed for each local housing authority based upon the type(s) of housing programs administered.

ANUEL: Allowable Non-Utility Expense Level

AP: Annual Plan

Annual Plan: A document prepared by each Local Housing Authority, incorporating the Capital Improvement Plan (CIP), Maintenance and Repair Plan, Budget, responses to the Performance Management Review, and other elements.

Cap Share is the amount of Formula Funding spending approved by DHCD for each year.

Capital Funds: Funds provided by DHCD to an LHA for the modernization and preservation of state-aided public housing, including Formula Funds and Special Capital Funds.

Capital Needs Assessment, similar to the CIP, often used for developments in the Section 8 New Construction/Substantial Rehabilitation program. Such developments are generally not eligible for state capital funds and therefore do not participate in the CIP process. However, to track their ongoing capital needs and plan for construction projects to address those needs, they often conduct a CNA to determine when building systems will wear out and need to be replaced, and what replacement will cost, so they can plan the ensure that the necessary funding will be available

Capital Projects are projects that add significant value to an asset or replace building systems or components. Project cost must be greater than $1000.

CIMS is a web-based software system used for creating CIP's and Annual Plans. For the CIP, the CIMS program allows the LHA to prioritize, select and schedule projects, assign funding sources and direct project spending to specific fiscal years to create a CIP that is consistent with the LHA's FF award amount and FF cap shares, plus any additional funding resources the LHA has identified. The LHA submits its CIP and DHCD conducts its review of the LHA's CIP in CIMS. For the Annual Plan CIMS imports data from other DHCD systems and combines that with data entered by the LHA.

CIP: A Capital Improvement Plan (CIP) is a five (5) year plan which identifies capital projects, provides a planning scope, schedule and budget for each capital project and identifies options for financing and implementing the plan. The contents of a CIP are limited to available resources. An approved CIP is required in order to receive Formula Funds.

CNA: Capital Needs Assessment

CPS is DHCD's transparent Web-based capital planning system that catalogues the condition of every building and site in the statewide public housing portfolio, providing LHAs with detailed technical information to make strategic long-term capital investments. It includes a Facility Condition Index (FCI) for every development that compares the value of expired components of a development relative to its replacement cost.

Deferred Maintenance is maintenance, upgrades, or repairs that are deferred to a future budget cycle or postponed for some other reason. Sometimes it is referred to as extraordinary maintenance.

Deficit housing authority: a housing authority whose income (mainly from rent) does not cover all its normal operating costs in its approved operating budget, and which therefore operates at a deficit and requires operating subsidy from DHCD.

DHCD: Massachusetts Department of Housing & Community Development

Extraordinary Maintenance: see the description for budget line 4610 in the Explanation of Budget Accounts in the Budget Section of this Annual Plan.

FF: Formula Funding

Formula Funding is state bond funding allocated to each LHA according to the condition (needs) of its portfolio in comparison to the entire state-aided public housing portfolio.

FYE: Fiscal Year End

HHA Administrative Fee is the fee paid to an HHA from the RCAT Program budget.

HHA: Host Housing Authority for the RCAT program.

Host Housing Authority (HHA). An LHA selected by the Department to employ and oversee an RCAT.

HUD: U.S. Department of Housing and Urban Development

LHA: Local Housing Authority

LTO: Local Tenants Organization

Management and Occupancy Report: This is an annual HUD review process that is used to evaluate the performance of developments in various HUD housing programs, including the Section 8 New Construction/Substantial Rehabilitation program, which some LHAs operate. It is similar to the state PMR process in that it evaluates LHA performance on variety of financial, housing quality, and other standards

Massachusetts Rental Voucher Program (MRVP) is a state-funded program that provides rental subsidies to low-income families and individuals.

MOR: Management and Occupancy Report

MRVP: Massachusetts Rental V DHCD's annual review of each housing authority's performance. It pulls together data on the authority's occupancy rates, tenant accounts receivables, accounts payable, budget variance, operating reserve, capital improvement plan submission, capital spending, annual inspections and work order and maintenance systems to identify and address areas of strength and areas for development. Its goal is to allow DHCD and the LHA to

take a deep dive into the data, lift up best practices, and work together towards improving operations oucher Program.

Performance Management Review (PMR):

PMR: Performance Management Review

RCAT: Regional Capital Assistance Team

Regional Capital Assistance Team: One of three organizations employed at HHAs designated by the Department to carry out the RCAT Program.

Sec.8 NC/SR (or S8NCSR): Section 8 New Construction and Substantial Rehabilitation

Section 8 New Construction and Substantial Rehabilitation (Sec.8 NC/SR): This term refers to a federal HUD housing program operated at a small number of state public housing developments whose construction was funded by state grants, but whose ongoing operating costs are supported by project-based subsidies from HUD's federal Section 8 program, rather than from state public housing operating funds..

Special Awards: In addition to allocations to each LHA, DHCD has created limited set aside funds to provide for extreme emergency or code compliance needs which are beyond the capacity of an LHA's current FF balance.

Surplus housing authority: a housing authority whose income (mainly from rent) covers all its normal operating costs in its approved operating budget, and which therefore operates at a surplus and does not require operating subsidy from DHCD.

Attachments

The following items have been uploaded as attachments to this Annual Plan.

- . Performance Management Review
- . Cover sheet for tenant satisfaction surveys
- . Public Comments and LHA Responses

LOWELL HOUSING AUTHORITY

Board of Commissioners
Rodney Elliott, Chairperson
William Samaras, Vice Chairperson
Mony Var, Commissioner
Joanie Bernes, Commissioner
Matt Marr, Commissioner

Tha Chhan
Executive Director

June 12, 2025

Please be advised that the Lowell Housing Authority (LHA) held a Public Hearing on Wednesday, June 11, 2025, at 4:30 pm, to discuss the proposed 2026 State Annual Plan.

I am pleased to inform you that there were no significant challenges or objections from our community members that were identified in relation to the proposed annual plan. This positive outcome exemplifies the collaborative efforts and commitment of our community members, the Lowell Housing Authority, and the administration in working towards enhancing our housing programs.

If you have any further questions or require additional information regarding the proposed 2026 State Annual plan, please feel free to contact me directly at 978-399-3610.

Sincerely,

Tha Chhan
Executive Director
Lowell Housing Authority

Resident Surveys – Background

Since 2016 DHCD has been working with the Center for Survey Research (CSR) at the University of Massachusetts Boston to survey residents in the state public housing units it oversees. The surveys are confidential, mailed directly to residents, and returned to CSR by mail (or, starting in 2019, completed on-line). CSR surveys residents of elderly/disabled units (also known as Chapter 667) and family units (also known as Chapter 200 and Chapter 705).

During each round all units are mailed surveys, with one exception: in the case of the twelve housing authorities with more than 225 c.200 family units, a randomly selected group of 225 units was surveyed at each housing authority. This group was determined to be large enough to generate statistically useful results. In both rounds, responses from c.200 and c.705 residents are always combined.

Round One Surveys (2016 – 2018)

In Round One of the surveys, CSR surveyed residents of elderly/disabled units (c.667) in three groups in the Fall of 2016, 2017 and 2018. CSR surveyed residents of family units (c.705 and c.200) in the Spring of 2016. (Note: there are many more c.667 units, so they were broken down into three groups).

Round Two Surveys (2019 – 2022)

Round Two of the surveys began in 2019. CSR surveyed about one-third of the elderly/disabled units in Fall 2019, Fall 2021, and Fall 2022. CSR surveyed all family units in Fall 2020.

Round Three Surveys (2023 – 2027)

Round Three of the surveys began in 2023. CSR surveyed about one-third of the elderly/disabled units and one-third of family units in Fall 2023.

LOWELL HOUSING AUTHORITY

Performance Management Review (PMR) Report

Fiscal Year End 9/30/2024

*For a detailed report of the Performance Management Review (PMR), please contact the Local Housing Authority

Executive Office of Housing and Livable Communities (EOHLC)

PMR Desk Audit Ratings Summary Official Published PMR Record

For a detailed report of the Performance Management Review (PMR), please contact the Local Housing Authority

Housing Authority	LOWELL HOUSING AUTHORITY
Fiscal Year Ending	Sep 2024
Housing Management Specialist	Thomas Lee
Facilities Management Specialist	Todd Lawson

Criteria	Score/Rating			
	Management			
	c.667	**c.705**	**c.200**	**Cumulative**
Occupancy Rate	Operational Guidance	Operational Guidance	Not Applicable	Operational Guidance
	c.667	**c.705**	**c.200**	**Cumulative**
Tenant Accounts Receivable (TAR)	Corrective Action	Corrective Action	Not Applicable	Corrective Action
Board Member Training	Corrective Action			
Certifications and Reporting Submissions	Operational Guidance			
Annual Plan	No Findings			
	Financial			
Adjusted Net Income	Corrective Action			
Operating Reserves	Corrective Action			

Report Date: 02/12/2025 12:41:52

EXECUTIVE OFFICE OF HOUSING AND LIVABLE COMMUNITIES (EOHLC)
Staff Certification & Training Rating

LHA Name	LOWELL HOUSING AUTHORITY
FYE	Sep 2024
HMS Name	Thomas Lee
FMS Name	Todd Lawson

Criteria	Rating
Staff Certification and Training	No Findings

EXECUTIVE OFFICE OF HOUSING AND LIVABLE COMMUNITIES (EOHLC)
CFA Submission

LHA Name	LOWELL HOUSING AUTHORITY
FYE	Sep 2024
HMS Name	Thomas Lee
FMS Name	Todd Lawson

CFA Submission

Rating: No Findings

Recommendations: 1. No Recommendations

EXECUTIVE OFFICE OF HOUSING AND LIVABLE COMMUNITIES (EOHLC)
PMR Desk Audit Recommendations Report

LHA Name	LOWELL HOUSING AUTHORITY
FYE	Sep 2024
HMS Name	Thomas Lee
FMS Name	Todd Lawson

Occupancy

Rating All: Operational Guidance
Rating 667: Operational Guidance
Rating 705: Operational Guidance
Rating 200: Not Applicable

1. Enter vacancies into system within 30 days and ensure that there are no duplicates. Reach out to HMS if accidental duplicates occur.
2. Use online vacancy system, see user guide if need help. All vacancies must be reported; and quarterly certifications must be completed certifying all data is in system. Request waivers when applicable.
3. Review turnovers with staff weekly or biweekly to monitor status of vacant units.
4. Please reference PHN 2024-03 Updates to Vacant Unit Policies for 2024, Attachment A, for allowable waiver categories.
5. Submit Vacancy reports consistently

Tenant Accounts Receivable (TAR)

Rating All: Corrective Action
Rating 667: Corrective Action
Rating 705: Corrective Action
Rating 200: Not Applicable

1. Submit Tenants Accounts receivable reports consistently

Board Member Training

Rating: Corrective Action

1. Ensure you update the board attendance application with the most recent board members, and their term dates.
2. Ensure each board member has a unique email for the board member training.
3. Provide computer guidance as needed to help board members complete the training.

Certifications and Reporting Submissions

Rating: Operational Guidance

1. Submit all four quarterly vacancy certifications by the end of the month following the quarter end.
2. Submit all four quarters of Tenants Accounts Receivables (TAR) application within 60 days of quarter end.
3. Submit all four quarterly operating statements within 60 days of the quarter end.
4. Schedule board meetings well in advance. Consider scheduling a backup date to ensure you are able to have your board vote/approval in time to meet reporting deadlines.
5. Set a recurring appointment in your email calendar for help remembering reporting dates and deadlines.

Annual Plan Submission

Rating: No Findings

1. No Recommendations

Adjusted Net Income/Revenue

Rating: Corrective Action

Revenue

1. No Recommendations

Expense

Salaries

1. No Recommendations

Legal

1. No Recommendations

Utilities

1. No Recommendations

Maintenance

1. No Recommendations

Other

1. Operating Statements must be submitted timely

Operating Reserve

Rating: Corrective Action

1. Please refer to 2019-01 Revisions to PMR Criteria for 1st Publishing Year and 2018-04 PHN 2018-04 Operating Reserve Augmentation and New Spending Thresholds and current budget guidelines.
2. Operating Statements must be submitted timely

EXECUTIVE OFFICE OF HOUSING AND LIVABLE COMMUNITIES (EOHLC)
CHAMP Close Out Report

LHA Name	LOWELL HOUSING AUTHORITY
FYE	Sep 2024
HMS Name	Thomas Lee
FMS Name	Todd Lawson

CHAMP Criteria 1a

Rating: No Findings

Recommendations: 1. No Recommendations

CHAMP Criteria 1b

Rating: No Findings

Recommendations: 1. No Recommendations

CHAMP Criteria 1c

Rating: No Findings

Recommendations: 1. No Recommendations

CHAMP Criteria 2a

Rating: Operational Guidance

Recommendations: 1. Ensure that all vacancies are recorded in the EOHLC Housing Apps Vacancy Reporting System within 30 days of the vacancy date.

CHAMP Criteria 2b

Rating: Corrective Action

Recommendations: 1. Ensure that all offers of housing were made using CHAMP for all units occupied in the Fiscal Year (Excluding Admin Transfers).
2. Ensure that all unit offer data is correctly entered into the EOHLC Housing Apps Vacancy Reporting System (Including Application ID, List Pull ID, Applicant Priority/Preference, and Lease Start date)

CHAMP Criteria 3a

Rating: No Findings

Recommendations: 1. No Recommendations

CHAMP Criteria 3b

Rating: No Findings

Recommendations: 1. No Recommendations

CHAMP Criteria 3c

Rating: No Findings

Recommendations: 1. No Recommendations

EXECUTIVE OFFICE OF HOUSING AND LIVABLE COMMUNITIES (EOHLC)
PMR Physical Condition Report

For any questions on your FMS PMR Ratings, please contact your FMS.

LHA Name	LOWELL HOUSING AUTHORITY
FYE	Sep 2024
HMS Name	Thomas Lee
FMS Name	Todd Lawson

Criteria 1: 100% of units inspected during FYE under review

Rating: No Findings

Recommendations: 1. No Recommendations

Criteria 2: Unit inspection Reports create, track, and report Work Orders for inspection repairs, and Work Orders are completed within 30 days or added to DM/CIP

Rating: No Findings

Recommendations: 1. No Recommendations

Criteria 3: Unit Inspection Reports accurately reflect necessary repairs

Rating: Operational Guidance

Recommendations: 1. Ensure that all work orders for all Health and Safety deficiencies are completed in the appropriate timeframe
2. Ensure that all Notices of Lease Violation are issued for all tenant related deficiencies identified during unit inspection

Criteria 4: Work Orders created for every vacancy and completed within 30 days (or waiver requested)

Rating: No Findings

Recommendations: 1. No Recommendations

Criteria 5: Vacancy Turnover Work Orders accurately reflect necessary repairs

Rating: No Findings

Recommendations: 1. No Recommendations

Criteria 6: LHA Preventive Maintenance Plan accurately reflects all necessary work to maximize life of LHA components

Rating: No Findings

Recommendations: 1. No Recommendations

Criteria 7: All emergency work orders are created, tracked, reported and completed within 48 hours

Rating: No Findings

Recommendations: 1. No Recommendations

Criteria 8: All requested work orders are created, tracked, reported and completed within 14 days or added to DM/CIP

Rating: No Findings

Recommendations: 1. No Recommendations

Health & Safety Deficiencies

Inspection reports were provided to the LHA at the time of the EOHLC site visit. Health and safety deficiencies were identified during the PMR Inspection. These items must be completed or initiated within 48 hours. Following completion of these health and safety deficiencies, the Executive Director must login to the FMS software application and certify, by electronic signature, that all health and safety deficiencies have been completed. Please contact your assigned FMS for further assistance.