

**WALTHAM 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 WALTHAM 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
200-01	Family	PROSPECT TERRACE	22	1949	140
667-01	Elderly	CAREY COURT	2	1956	24
200-02	Family	CHESTERBROOK GARDENS	23	1951	101
200-03	Family	DANA COURT	3	1954	32
667-02	Elderly	BEAVER BROOK APARTMENTS	14	1959	60
667-04	Elderly	ORANGE STREET	2	1966	32
667-08	Elderly	WINCHESTER - CRANE	1	1982	59
667-09	Elderly	SOUTH STREET	1	1988	20
667-03	Elderly	MYRTLE	2	1962	24
	Family	Family units in smaller developments	9		22
	Elderly	Elderly Elderly units in smaller developments	1		7
	Other	Other Special Occupancy units	3		12
Total			83		533

**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.

WALTHAM HOUSING AUTHORITY manages 35 MRVP vouchers.

### **Federally Assisted Developments**

WALTHAM HOUSING AUTHORITY also manages Federally-assisted public housing developments and/or federal rental subsidy vouchers serving 721 households.

**LHA Central Office**

WALTHAM HOUSING AUTHORITY  
110 Pond Street Waltham, MA 02451-4505

John Gollinger, Executive Director  
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**LHA Board of Commissioners**

	<b><u>Role</u></b>	<b><u>Category</u></b>	<b><u>From</u></b>	<b><u>To</u></b>
Patricia McGrath	Chair		04/12/2007	04/30/2022
Kelly Durkee-Erwin	Vice Chair	State Appointee	05/26/2018	04/30/2022
Scott Hovsepian	Treasurer	Labor Appointee	04/12/2009	04/30/2022
Robert LeBlanc	Member		04/12/2013	04/30/2022
Gail David	Member	Federal Tenant Rep	05/01/2023	05/01/2026

**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.	4/25/2025
B.	Advertise the public hearing in public postings.	4/25/2025
C.	Notify all LTOs or RAB (if there is one) of the hearing and provide access to the Proposed Annual Plan.	4/25/2025
D.	Post draft AP for tenant and public viewing.	4/25/2025
E.	Hold quarterly meeting with LTO or RAB to review the draft AP. (Must occur before the LHA Board reviews the Annual Plan.)	5/28/2025
F.	Annual Plan Hearing. Hosted by the LHA Board, with a quorum of members present. (For Boston, the Administrator will host the hearing.)	7/8/2025
G.	Executive Director presents the Annual Plan to the Board.	7/8/2025
H.	Board votes to approve the AP. (For Boston Housing Authority, the Administrator approves and submits the AP.)	7/8/2025

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

I, John Gollinger, Executive Director of the WALTHAM HOUSING AUTHORITY, certify on behalf of the Housing Authority that I have conducted an annual review of all WALTHAM 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 WALTHAM 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, John Gollinger, Executive Director of the WALTHAM 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: 7/14/2025

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)	\$3,399,441.11		Total of all FF awards minus prior FF spending
LHA Emergency Reserve	\$509,916.17		Amount to reserve for emergencies
Net FF Funds (First 3 Years of the CIP)	\$2,889,524.94	\$2,705,659.81	Funds to plan & amount actually planned in the first 3 years of the CIP
ADA Set-aside	\$46,183.45	\$46,183.45	Accessibility projects
DMH Set-aside	\$0.00	\$0.00	Dept. of Mental Health facility
DDS Set-aside	\$94,801.65	\$94,801.65	Dept. of Developmental Services facility
Unrestricted Formula Funding (FF)	\$2,748,539.84	\$2,564,674.71	Funds awarded by DHCD to be used on projects selected by the LHA and approved by DHCD.
Special DHCD Funding	\$5,096,370.51	\$5,051,170.51	Targeted awards from DHCD
Community Development Block Grant (CDBG) Funds	\$833,596.23	\$833,596.23	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 or town for specific projects.
Operating Reserve(OR) Funds	\$0.00	\$0.00	Funds from the LHA's operating budget.
Other Funds	\$3,679,293.96	\$3,679,293.96	Funds other than those in the above categories. See explanation below.
Total funds and planned spending	\$12,498,785.64	\$12,269,720.51	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
315123	HOME Funds: Sustainable Improvements	ORANGE STREET 667-04	\$597,254	\$35,545	\$8,555	\$0	\$0	\$0	\$0	\$0
315128	FF: Balcony support study	ORANGE STREET 667-04	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
315129	FF: Replace Exterior Components	HAMMOND ST 167-01	\$102,980	\$98,656	\$5,325	\$0	\$0	\$0	\$0	\$0
315148	FF: 689-4 Exterior & Interior Renovations 689-4 (5 Brookway Rd)	CHESTERBROOK GARDENS 200-02	\$134,138	\$117,844	\$0	\$16,294	\$0	\$0	\$0	\$0
315150	FF: Full Electrical Upgrade Dana Court	DANA COURT 667-04	\$1,933,747	\$1,011,498	\$4,980	\$0	\$0	\$0	\$0	\$0
315154	FF: Replace Bulkheads	BEAVER BROOK APARTMENTS 667-02	\$34,160	\$0	\$0	\$34,160	\$0	\$0	\$0	\$0
315156	Roof Replacement - Mult Roofs - 200-01 - CPA	PROSPECT TERRACE 200-01	\$517,500	\$14,400	\$0	\$0	\$0	\$0	\$0	\$0
315161	Roof Replacement - Multi Roofs - Membrane Roof Replacement - CPA	BEAVER BROOK APARTMENTS 667-02	\$1,968,045	\$163,987	\$0	\$0	\$0	\$0	\$0	\$0
315164	Fence Replacement	ORANGE STREET 667-04	\$4,394	\$4,394	\$0	\$0	\$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
315166	EMG - Replace Water Line	BANKS ST 667-07	\$4,200	\$0	\$0	\$4,200	\$0	\$0	\$0	\$0
315168	Siding Repairs - Banks Street	BANKS ST 667-07	\$2,750	\$0	\$0	\$0	\$0	\$0	\$0	\$0
315170	Prospect Terrace Boiler motor replacement/Dist Pumps	PROSPECT TERRACE 200-01	\$327,634	\$305,312	\$0	\$0	\$0	\$0	\$0	\$0
315171	Repaving of walkways and sidewalks, Trash Pad/Dumpster Enclosures - Chesterbrook	CHESTERBROOK GARDENS 200-02	\$1,422,103	\$712,145	\$6,036	\$0	\$0	\$0	\$0	\$0
315172	H&S FY20: Tree trimming/Removal at Prospect Terr. 200-01	PROSPECT TERRACE 200-01	\$21,245	\$13,690	\$0	\$7,555	\$0	\$0	\$0	\$0
315173	Asbestos Abatement - Units - CR Request	BEAVER BROOK APARTMENTS 667-02	\$50,750	\$3,380	\$0	\$47,371	\$0	\$0	\$0	\$0
315175	Security Cameras	PROSPECT TERRACE 200-01	\$40,191	\$25,836	\$0	\$12,510	\$1,845	\$0	\$0	\$0
315176	Security Cameras	CHESTERBROOK GARDENS 200-02	\$36,000	\$21,717	\$0	\$12,784	\$1,500	\$0	\$0	\$0
315177	ADA - Auto Doors	WINCHESTER - CRANE 667-08	\$30,430	\$25,621	\$0	\$4,809	\$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
315178	Replace Sprinkler Heads/Valves - Fire Suppression System	WINCHESTER - CRANE 667-08	\$29,743	\$17,948	\$0	\$11,795	\$0	\$0	\$0	\$0
315179	Update Fire Alarm Modules	WINCHESTER - CRANE 667-08	\$7,389	\$6,050	\$0	\$1,339	\$0	\$0	\$0	\$0
315180	200-02 Boiler Replacement 10 & 11 Chester Lane	CHESTERBROOK GARDENS 200-02	\$46,470	\$38,771	\$0	\$7,700	\$0	\$0	\$0	\$0
315181	Sewer Main Replacement - Dana Court	DANA COURT 200-03	\$23,950	\$13,938	\$0	\$10,012	\$0	\$0	\$0	\$0
315182	Install New Security Cameras	SOUTH STREET 667-09	\$2,600	\$1,216	\$0	\$1,384	\$0	\$0	\$0	\$0
315183	Replace Kitchen - South Street 689-03	SOUTH STREET GROUP HOME 689-03	\$14,773	\$9,836	\$0	\$4,937	\$0	\$0	\$0	\$0
315184	Unit Inspection - Renovation	200-03, 667-01, 667-02, 667-03, 667-04, 667-08, 667-09, 705-02, 705-2A, 705-03	\$357,050	\$30,886	\$0	\$276,505	\$0	\$0	\$0	\$0
315186	Replace Boilers -ABCD - Hammond	TOWNSEND STREET 689-01	\$25,000	\$0	\$0	\$0	\$0	\$0	\$0	\$0
315187	ADA Walk In Shower - Request CR	Family Barrier Free (200-2 Bldg. # 24) 689-04	\$24,299	\$14,998	\$0	\$9,302	\$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
315189	Targeted ARPA funds: Fire Alarm Upgrades - 667-4 Orange Street and 667-3 Myrtle Street	ORANGE STREET 667-04	\$551,563	\$0	\$40,223	\$0	\$0	\$0	\$0	\$0
315190	Fire Alarm EMG Repairs	ORANGE STREET 667-04	\$27,833	\$18,279	\$0	\$7,727	\$0	\$0	\$0	\$0
315192	Repair/Replace Broken Sprinkler and Sewer Pipe	CHESTERBROOK GARDENS 200-02	\$37,813	\$22,606	\$0	\$15,208	\$0	\$0	\$0	\$0
315193	Parking lot & walkways, ADA Unit Upgrades -City Funds-HILAPP	BEAVER BROOK APARTMENTS 667-02	\$3,016,050	\$35,574	\$0	\$1,861,231	\$319,246	\$0	\$0	\$0
315195	Repair/Replace Sprinkler Pipe & Electrical Panel - Unit	BANKS ST 667-07	\$31,878	\$13,545	\$0	\$18,334	\$0	\$0	\$0	\$0
315196	SHMCAP Solar PV & Storage	ORANGE STREET 667-04	\$10,000	\$0	\$0	\$3,782	\$0	\$0	\$0	\$0
315197	ARPA Targeted Federal Pacific Panels	ORANGE STREET 667-04	\$631,897	\$0	\$68,893	\$14,478	\$0	\$0	\$0	\$0
315199	Community Room Floor/Carpet Replacement - 22 Brookway Road	CHESTERBROOK GARDENS 200-02	\$22,016	\$12,795	\$0	\$9,222	\$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
315200	Repair/Replace - Sewer Pipe Emergency- 22 Brookway Road	CHESTERBROOK GARDENS 200-02	\$53,302	\$44,819	\$0	\$8,484	\$0	\$0	\$0	\$0
315201	Water Main Replacement - Hammond St - Emergency	HAMMOND ST 689-02	\$23,308	\$13,825	\$0	\$9,483	\$0	\$0	\$0	\$0
315203	ARPA FF & FF: 667-2 and 689-2 Kitchen-Bath Modernization	Carey Court 667-1 and Hammond Street 689-2	\$1,528,308	\$0	\$0	\$714,495	\$0	\$0	\$0	\$0
315205	Security Cameras (Prospect) Phase 2	PROSPECT TERRACE 200-01	\$14,369	\$0	\$0	\$14,369	\$0	\$0	\$0	\$0
315206	Security Cameras (Chesterbrook) Phase 2	CHESTERBROOK GARDENS 200-02	\$14,369	\$0	\$0	\$0	\$0	\$0	\$0	\$0
315207	Boiler Replacement - Dana Court	DANA COURT 200-03	\$42,350	\$0	\$0	\$42,350	\$0	\$0	\$0	\$0
315208	Security Cameras (Dana Court)	DANA COURT 200-03	\$26,469	\$6,100	\$0	\$19,417	\$0	\$0	\$0	\$0
315209	New Laundry Room (Carey Court)	CAREY COURT 667-01	\$285,863	\$0	\$0	\$0	\$0	\$0	\$0	\$0
315210	Security Cameras (Beaver Brook Apts)	BEAVER BROOK APARTMENTS 667-02	\$22,688	\$0	\$0	\$22,688	\$0	\$0	\$0	\$0
315211	Security Cameras (New Grove)	NEW GROVE STREET 705-03	\$12,856	\$0	\$0	\$12,856	\$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
315212	Boiler & DHW Pipe Replacement - Pipe Insulation - Dana Court - EMG	DANA COURT 200-03	\$156,224	\$9,500	\$0	\$0	\$0	\$0	\$0	\$0
315213	Decarbonization Feasibility Study - SUST	PROSPECT TERRACE 200-01	\$189,694	\$1,087	\$0	\$0	\$0	\$0	\$0	\$0
315214	Sewer Line Project - Chesterbrook	CHESTERBROOK GARDENS 200-02	\$162,423	\$0	\$17,948	\$144,476	\$0	\$0	\$0	\$0
315215	Main Sewer Line - Replacement	CHESTERBROOK GARDENS 200-02	\$12,100	\$0	\$0	\$12,100	\$0	\$0	\$0	\$0
315216	Road and walkway patch & repair - 200-02	CHESTERBROOK GARDENS 200-02	\$92,263	\$0	\$0	\$88,942	\$0	\$0	\$0	\$0
315217	Kitchen-Bathroom Modernization - BBA - Phase 1	BEAVER BROOK APARTMENTS 667-02	\$757,777	\$0	\$0	\$641,935	\$29,892	\$0	\$0	\$0
315218	ADA Ramps - 75 & 85 Myrtle Street	MYRTLE 667-03	\$33,275	\$0	\$0	\$28,275	\$0	\$0	\$0	\$0
315219	Replace Windows - Winchester - Crane	WINCHESTER - CRANE 667-08	\$2,318,465	\$0	\$0	\$480,917	\$392,101	\$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
315222	Hot Water Storage Tank Replacement - Prospect (Dermody & Hanson)	PROSPECT TERRACE 200-01	\$53,830	\$27,160	\$0	\$10,618	\$0	\$0	\$0	\$0
315223	Bathroom Upgrade HP - Roll In Shower - Phase 1	CHESTERBROOK GARDENS 200-02	\$28,468	\$19,607	\$0	\$8,861	\$0	\$0	\$0	\$0
315224	200-02 Boiler Replacement 18 & 86 Chester Lane	CHESTERBROOK GARDENS 200-02	\$45,375	\$0	\$0	\$43,742	\$0	\$0	\$0	\$0
315225	Replace Sprinkler Heads - South Street	SOUTH STREET 667-09	\$13,613	\$7,338	\$0	\$5,785	\$0	\$0	\$0	\$0
315226	Vacancy Unit Turnover-Multipl e Units-Prospect	PROSPECT TERRACE 200-01	\$73,356	\$0	\$0	\$41,571	\$0	\$0	\$0	\$0
315227	Underground Pex Piping Replacement - Prospect	PROSPECT TERRACE 200-01	\$189,970	\$0	\$0	\$112,741	\$0	\$0	\$0	\$0
315228	Vacancy Unit Turnover-Multipl e Units-Chesterbro ok	CHESTERBROOK GARDENS 200-02	\$74,869	\$0	\$0	\$26,731	\$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
315229	Vacancy Unit Turnover-Multiple Units - Beaverbrook	BEAVER BROOK APARTMENTS 667-02	\$26,469	\$0	\$0	\$10,692	\$0	\$0	\$0	\$0
315230	Vacancy Unit Turnover-Multiple Units - Winchester-Crane	WINCHESTER - CRANE 667-08	\$88,028	\$0	\$0	\$41,162	\$0	\$0	\$0	\$0
315231	Vacancy Unit Turnover-Multiple Units - New Grove St.	NEW GROVE STREET 705-03	\$37,056	\$0	\$0	\$16,189	\$0	\$0	\$0	\$0
315233	Replace Broken Sewer Line - 75-77 Myrtle St	MYRTLE 667-03	\$90,894	\$0	\$0	\$89,655	\$0	\$0	\$0	\$0
315234	Tree Removal - Myrtle (Site)	MYRTLE 667-03	\$12,856	\$0	\$0	\$5,894	\$0	\$0	\$0	\$0
315235	Reasonable Accommodation Request-Roll in Shower-Banks St	BANKS ST 667-07	\$30,250	\$0	\$0	\$9,681	\$0	\$0	\$0	\$0
315236	Reasonable Accommodation Request-Roll in Shower-South Street	SOUTH STREET GROUP HOME 689-03	\$30,250	\$0	\$0	\$13,473	\$0	\$0	\$0	\$0
315237	Replace Windows - Computer Center	CHESTERBROOK GARDENS 200-02	\$106,495	\$0	\$0	\$59,675	\$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
•	Solar Panels - Prospect Terrace - OtherFunds - Combine	PROSPECT TERRACE 200-01	\$451,250	\$0	\$0	\$0	\$0	\$0	\$0	\$0
•	Fence Replacement	PROSPECT TERRACE 200-01	\$99,825	\$0	\$0	\$0	\$0	\$25,385	\$74,441	\$0
•	Kitchen-Bathroom Modernization - Phase 1 DC	DANA COURT 200-03	\$1,429,313	\$0	\$0	\$0	\$0	\$37,163	\$111,182	\$861,926
•	Solar Panels - Beaverbrook - OtherFunds - Combine	BEAVER BROOK APARTMENTS 667-02	\$501,250	\$0	\$0	\$0	\$0	\$0	\$0	\$0
•	Solar Panels - Myrtle Street - OtherFunds - Combine	MYRTLE 667-03	\$171,250	\$0	\$0	\$0	\$0	\$0	\$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
315123	HOME Funds: Sustainable Improvements	Insulation - roof	\$0	\$33,500	\$7,875	\$0	\$0	\$0	\$0	\$553,155
315129	FF: Replace Exterior Components	Rebate for FF: Replace Exterior Components	\$0	\$0	\$0	\$905	\$0	\$0	\$0	\$0
315148	FF: 689-4 Exterior & Interior Renovations 689-4 (5 Brookway Rd)	E-Bidding/E-Hostin g rebate for #315148	\$0	\$0	\$0	\$862	\$0	\$0	\$0	\$0
315150	FF: Full Electrical Upgrade Dana Court		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$867,546
315156	Roof Replacement - Mult Roofs - 200-01 - CPA		\$0	\$0	\$0	\$0	\$0	\$517,500	\$0	\$0
315161	Roof Replacement - Multi Roofs - Membrane Roof Replacement - CPA	asbestos removal	\$0	\$25,000	\$0	\$0	\$0	\$1,627,850	\$0	\$0
315168	Siding Repairs - Banks Street		\$0	\$0	\$0	\$0	\$2,750	\$0	\$0	\$0
315170	Prospect Terrace Boiler motor replacement/Dist Pumps	replace boiler motor and distribution pumps	\$278,554	\$0	\$0	\$0	\$0	\$0	\$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
315171	Repaving of walkways and sidewalks, Trash Pad/Dumpster Enclosures - Chesterbrook		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$648,777
315172	H&S FY20: Tree trimming/Removal at Prospect Terr. 200-01	tree trimming	\$0	\$0	\$0	\$21,245	\$0	\$0	\$0	\$0
315173	Asbestos Abatement - Units - CR Request	asbestos removal of ceiling tiles	\$0	\$47,250	\$0	\$0	\$0	\$0	\$0	\$0
315177	ADA - Auto Doors	automatic door openers	\$0	\$15,867	\$0	\$0	\$0	\$0	\$0	\$0
315180	200-02 Boiler Replacement 10 & 11 Chester Lane	315180 - 200-02 Boiler Replacement 10 & 11 Chester Lane	\$46,470	\$0	\$0	\$0	\$0	\$0	\$0	\$0
315181	Sewer Main Replacement - Dana Court	315181 - Sewer Main Replacement - Dana Court	\$23,950	\$0	\$0	\$0	\$0	\$0	\$0	\$0
315186	Replace Boilers -ABCD - Hammond		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$25,000
315187	ADA Walk In Shower - Request CR	Roll-in shower installation	\$0	\$24,299	\$0	\$0	\$0	\$0	\$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
315189	Targeted ARPA funds: Fire Alarm Upgrades - 667-4 Orange Street and 667-3 Myrtle Street	ARPA Targeted	\$0	\$0	\$0	\$550,228	\$0	\$0	\$0	\$0
315193	Parking lot & walkways, ADA Unit Upgrades -City Funds-HILAPP	315193 - Parking lot & walkways, ADA Unit Upgrades -City Funds-HILAPP	\$0	\$0	\$0	\$1,162,164	\$800,000	\$0	\$0	\$0
315197	ARPA Targeted Federal Pacific Panels	ARPA Targeted	\$0	\$0	\$0	\$377,260	\$0	\$0	\$0	\$254,637
315203	ARPA FF & FF: 667-2 and 689-2 Kitchen-Bath Modernization	ARPA Formula Funding	\$0	\$0	\$0	\$669,861	\$0	\$0	\$0	\$800,000
315209	New Laundry Room (Carey Court)		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$285,863
315212	Boiler & DHW Pipe Replacement - Pipe Insulation - Dana Court - EMG	DHW piping sections replacement	\$156,224	\$0	\$0	\$0	\$0	\$0	\$0	\$0
315213	Decarbonization Feasibility Study - SUST	DER Feasibility Study	\$0	\$0	\$69,856	\$0	\$0	\$0	\$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
315214	Sewer Line Project - Chesterbrook	sewer line pipe replacement	\$162,423	\$0	\$0	\$0	\$0	\$0	\$0	\$0
315218	ADA Ramps - 75 & 85 Myrtle Street	ADA ramps at myrtle street	\$0	\$28,275	\$0	\$0	\$0	\$0	\$0	\$5,000
315219	Replace Windows - Winchester - Crane	315219 - Replace Windows - Winchester - Crane	\$0	\$0	\$0	\$878,617	\$0	\$0	\$0	\$1,439,848
315222	Hot Water Storage Tank Replacement - Prospect (Dermody & Hanson)	HW storage tank replacement	\$40,838	\$0	\$0	\$0	\$0	\$0	\$0	\$0
315223	Bathroom Upgrade HP - Roll In Shower - Phase 1	bath upgrade walk in shower	\$0	\$28,468	\$0	\$0	\$0	\$0	\$0	\$0
315226	Vacancy Unit Turnover-Multiple Units-Prospect	vu rehab prospect 200-1	\$0	\$0	\$0	\$73,356	\$0	\$0	\$0	\$0
315227	Underground Pex Piping Replacement - Prospect	underground pex piping replacement	\$189,970	\$0	\$0	\$0	\$0	\$0	\$0	\$0
315228	Vacancy Unit Turnover-Multiple Units-Chesterbroo k	vu rehab	\$0	\$0	\$0	\$74,869	\$0	\$0	\$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
315229	Vacancy Unit Turnover-Multiple Units - Beaverbrook	6677-2 vu	\$0	\$0	\$0	\$26,469	\$0	\$0	\$0	\$0
315230	Vacancy Unit Turnover-Multiple Units - Winchester-Crane	vu 667-8	\$0	\$0	\$0	\$88,028	\$0	\$0	\$0	\$0
315231	Vacancy Unit Turnover-Multiple Units - New Grove St.	vu 705-3	\$0	\$0	\$0	\$37,056	\$0	\$0	\$0	\$0
315235	Reasonable Accommodation Request-Roll in Shower-Banks St	315235 - Reasonable Accommodation Request-Roll in Shower-Banks St	\$0	\$30,250	\$0	\$0	\$0	\$0	\$0	\$0
315236	Reasonable Accommodation Request-Roll in Shower-South Street	315236 - Reasonable Accommodation Request-Roll in Shower-South Street	\$0	\$30,250	\$0	\$0	\$0	\$0	\$0	\$0
315237	Replace Windows - Computer Center		\$0	\$0	\$0	\$0	\$31,000	\$0	\$0	\$0
•	Solar Panels - Prospect Terrace - OtherFunds - Combine		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$451,250

## 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
•	Solar Panels - Beaverbrook - OtherFunds - Combine		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$501,250
•	Solar Panels - Myrtle Street - OtherFunds - Combine		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$171,250



## **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.

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

- Projected spending on projects currently in bidding or construction exceeds Cap Share in one or more years of the CIP.

Projected spending on projects currently in bidding or construction exceeds Cap Share in year 1 due to a major active FISH Project.

#### **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.

Waltham Housing Authority has not requested additional funding.

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

The continuing goals for the Waltham Housing Authority are to reduce our carbon footprint, reduce energy costs, maximize the Tax credit opportunities through replacement of boilers with energy efficient heat pumps and A/C units whenever possible. The WHA continues to turn units over at historic levels in an effort to reduce vacancies, shorten vacancy turnaround times and provide safe, decent ,sanitary and affordable housing. The housing authority has also engaged in utilizing forced accounts in addressing unit turnovers.

**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:

In prior years we have planned to do many projects that utilizes the maximum of our formula funds. Thus, this year due to very careful planning we have not added any additional projects. We did however increase the scope of the Kitchen & Bathroom Mod at our 200-03 in order to address more kitchens/baths. In the future we will continue to address further deficiencies as additional funding becomes available.

**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 12/31/2024.

**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 05/15/2024.

**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:

We have depleted our fund resources at this time. We will continue to address further deficiencies as additional funds become available.

**10. Accessibility**

We have identified the following accessibility deficiencies in our portfolio:

Ramps at our 667-03

We have incorporated the following projects in our CIP to address accessibility deficiencies:

We incorporated ramps at our 667-03 (In addition to addressing some ADA at our 667-02)

Beaverbrook Dev

**Annual Plan**  
**Capital Improvement Plan**

**11. Special needs development**

Waltham 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.

**12. Energy and water consumption**

Our 12 most recent monthly energy reports are for months 3/2024 to 2/2025.

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
	667-04	200-02		200-03
				200-01
				705-03
				200-02
				667-02

We have installed LED lighting in order to cut down on electrical usage, as well as Low Flow Toilets and Shower Head Aerators. The rates in Waltham have gone up again this year.

**13. Energy or water saving initiatives**

Waltham Housing Authority is currently pursuing energy or water-saving audits or grants as note We are addressing and replacing existing windows at 101 Prospect street

**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.)

7% c. 667 (DHCD Goal 2%)

4% c. 200 (DHCD Goal 2%)

5% c. 705 (DHCD Goal 2%)

Waltham Housing Authority will address the excess vacancies in the following manner:

We have several projects that will help to reduce the rates. We have been having better success filling units as of lately . It appears we have a higher rate at our 667 Elderly as tenants do pass on. We continuously try to turnover units as quickly as possible and do our best to fill them as quickly as possible using the CHAMP System.

## **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.**

### Additional Remarks by the WALTHAM HOUSING AUTHORITY

PHA-Web

## 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	781-899-6363	24-7
Call LHA at Phone Number	781-899-6363	8:00am - 4:30pm Mon, Tues, Wednesday. 8:00 - 5:30 Thursday, Friday 8-12
Other	781-844-1202	24-7

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 WALTHAM 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

## Normal Maintenance Request Process

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

METHOD	CONTACT INFO.	TIMES
Text Phone Number		
Call Answering Service	781-899-6363	24/7
Call Housing Authority Office	781-899-6363	24/7
Submit Online at Website	<a href="http://walhouse.org/Work_Order_Request.php">http://walhouse.org/Work_Order_Request.php</a>	24/7
Email to Following Email		
Other		

## Work Order Management

- A. EOHLC review of this housing authority's operations shows that the authority uses the following system for tracking work orders: PHA Web
- 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.	<input checked="" type="checkbox"/>
2	Maintenance Requests logged into the work system	<input checked="" type="checkbox"/>
3	Work Orders generated	<input checked="" type="checkbox"/>
4	Work Orders assigned	<input checked="" type="checkbox"/>
5	Work Orders tracked	<input checked="" type="checkbox"/>
6	Work Orders completed/closed out	<input checked="" type="checkbox"/>
7	Maintenance Reports or Lists generated	<input checked="" type="checkbox"/>

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

Work orders are review daily by the Maintenance Director, Maintenance foreman and Assistant Executive Director.



## Maintenance Plan Narrative

Following are WALTHAM 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?

About 90% of our feed back is positive regarding our maintenance staff.

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

We have purchased new equipment, we have critiqued and streamlined our maintenance operations to become more efficient.

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

To get 100% customer satisfaction rating.

- 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	\$1,408,272.00	\$282,500.00
Last Fiscal Year Actual Spending	\$1,524,905.00	\$486,573.00
Current Fiscal Year Budget	\$1,451,818.00	\$406,100.00

- E. Unit Turnover Summary

# Turnovers Last Fiscal Year	36
Average time from date vacated to make unit "Maintenance Ready"	46 days
Average time from date vacated to lease up of unit	94 days

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

The Waltham Housing Authority has called on the City of Waltham over the the last 10 years to contribute funding to our Capital Projects. The city of Waltham has contributed in excess of 12 million dollars to out public housing portfolio towards capital projects.

## Attachments

These items have been prepared by the WALTHAM 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.

## Waltham Housing Authority

### Work Order Complete/Incomplete Report

Program(s): State 200, State 667, State 705, State 689-1 +4

Project(s): 200-1 Prospect Terrace, 200-2 Chesterbrook Gardens, 200-3 Dana Court (Lowell, Gardner St.) +15

Status: Complete, Status Included: Preventive, Employee: All, Created From: 8/1/2023, Created Through: 3/6/2025, Completed From: 1/1/1900, Completed Through: 12/31/9999

Work Order By Priority					
Priority	Count	Incomplete	Complete	Tot. Days	Avg. Days
Preventive	157	0	157	2,652.91	16.90
<b>Totals:</b>	<b>157</b>	<b>0</b>	<b>157</b>	<b>2,652.91</b>	<b>16.90</b>

Work Order By Employee					
Assigned Employee	Count	Incomplete	Complete	Tot. Days	Avg. Days
Anthony Cacciatore	2	0	2	0.51	0.26
Ben Haggerty	7	0	7	0.66	0.09
Carl Manganelli*	1	0	1	0.33	0.33
Cheri Galvez	13	0	13	121.14	9.32
Chris Cardona	3	0	3	81.17	27.06
Dale Fraser	9	0	9	4.32	0.48
Dan Hogan	28	0	28	1,266.34	45.23
David VanBuskirk	6	0	6	29.96	4.99
Gone Green Fire Alarm	7	0	7	33.33	4.76
Grounds Crew	1	0	1	0.17	0.17
Jimmy Morin	39	0	39	85.61	2.20
Joseph McKinnon	1	0	1	4.25	4.25
Matthew Peterson	2	0	2	0.63	0.32
Mike Hernandez	1	0	1	28.38	28.38
Randy Demeo	2	0	2	51.63	25.82
Sharif Omer	18	0	18	144.38	8.02
Spencer Sostilio	14	0	14	360.75	25.77
Thomas Crowe Jr.	2	0	2	29.59	14.80
Tim Schofield	1	0	1	0.33	0.33
Work Orders	57	0	57	409.43	7.18
<b>Totals:</b>	<b>157</b>	<b>0</b>	<b>157</b>	<b>2,652.91</b>	<b>16.90</b>

W/O #	Priority	Unit Address	Tenant Name	Created Date	Completed Date	Mat.	Labor	Actual	Billed
Program: State 200									
Project: 200-1 Prospect Terrace									
26448	Preventive			08/01/2023 06:38 AM	08/01/2023 02:30 PM	\$0.00	\$0.00	\$0.00	\$0.00
		Description: Paint Bollards @ 100 PHR Parking Lot							

W/O #	Priority	Unit Address	Tenant Name	Created Date	Completed Date	Mat.	Labor	Actual	Billed
Program: State 200									
Project: 200-1 Prospect Terrace									
27052	Preventive			09/15/2023 08:00 AM	09/15/2023 11:55 AM	\$0.00	\$0.00	\$0.00	\$0.00
	Description: clean all storm Drains all properties								
27388	Preventive	10 Dermody Road		10/05/2023 08:00 AM	10/05/2023 08:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
	Description: Anode; Check/Replace if needed all 4 anode rods, 2 per Lochnivar HW tank Boiler room 4- under 10H Dermody								
27389	Preventive	100 Prospect Hill Road		10/05/2023 08:00 AM	10/05/2023 09:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
	Description: Anode; Check/Replace if needed all 4 anode rods, 2 per Lochnivar HW tank- boiler room 3 under 100J Prospect Hill road								
27390	Preventive	58 Hansen Road		10/05/2023 08:00 AM	11/06/2023 04:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
	Description: Anode; Check/Replace if needed all 4 anode rods, 2 per Lochnivar HW tank at boiler room 2- under 58A Hansen Road								
27391	Preventive	42 Prospect Hill Road		10/05/2023 08:00 AM	10/05/2023 10:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
	Description: Anode; Check/Replace if needed all 4 anode rods, 2 per Lochnivar HW tank located under 42D Prospect Hill Road								
27569	Preventive			10/14/2023 08:00 AM	10/24/2023 12:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
	Description: Infra-red scan of all common area breaker panels for hot breakers and exercise all breakers - replace or repair issues as necessary								
		Boiler Room 1							
		Boiler Room 2							
		Boiler Room 3							
		Boiler Room 4							
29508	Preventive			02/06/2024 08:00 AM	02/06/2024 02:44 PM	\$0.00	\$0.00	\$0.00	\$0.00
	Description: Annual Fire Alarm Testing								

W/O #	Priority	Unit Address	Tenant Name	Created Date	Completed Date	Mat.	Labor	Actual	Billed
Program: State 200									
Project: 200-1 Prospect Terrace									
30400	Preventive			04/06/2024 08:00 AM	04/19/2024 12:17 PM	\$0.00	\$0.00	\$0.00	\$0.00
	Description: Replace all fire stops every 60 months (5 years)								
	Task Description: *No Description*								
31045	Preventive			05/20/2024 08:59 AM	05/21/2024 08:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
	Description: Dryer vent cleaning with air house vendor								
33645	Preventive			10/14/2024 08:00 AM	11/12/2024 03:22 PM	\$0.00	\$34.00	\$34.00	\$0.00
	Description: Infra-red scan of all common area breaker panels for hot breakers and exercise all breakers - replace or repair issues as necessary								
	Boiler Room 1								
	Boiler Room 2								
	Boiler Room 3								
	Boiler Room 4								
	Task Description: Infrared Scanning								
34973	Preventive			12/12/2024 07:07 AM	12/12/2024 09:30 AM	\$0.00	\$200.00	\$200.00	\$0.00
	Description: Thoroughly check heating lines under all building for Boiler Room 1 & 3 Loops.								
	Red dye was added to the loops to locate a leak in both loops.								
	Be sure to check foundation walls where piping exits and enters for evidence of underground leaks.								
	Task Description: Check for leaks (Red Dye)								
35424	Preventive			01/08/2025 08:18 AM	01/08/2025 02:45 PM	\$0.00	\$425.00	\$425.00	\$0.00
	Description: Clean out boiler rooms. Remove trash, Clean out leaves and debris, report any boiler issue to foreman								
	PHT (4)								
	Carey Court (2)								
	Dana Court (1)								
	Myrtle Street (2)								
	WC (1)								
	Task Description: Custodial (Daily)								
36032	Preventive			02/06/2025 08:00 AM	02/12/2025 02:27 PM	\$0.00	\$0.00	\$0.00	\$0.00
	Description: Annual Fire Alarm Testing								
200-1 Prospect Terrace		Incomplete: 0		Complete: 14		\$0.00	\$659.00	\$659.00	\$0.00

W/O #	Priority	Unit Address	Tenant Name	Created Date	Completed Date	Mat.	Labor	Actual	Billed
Program: State 200									
Project: 200-2 Chesterbrook Gardens									
27570	Preventive			10/15/2023 08:00 AM	03/11/2024 02:03 PM	\$0.00	\$0.00	\$0.00	\$0.00
	Description: Infra-red scan of all common area breaker panels for hot breakers and excercise all breakers- replace or repair issues as necessary								
29468	Preventive			02/02/2024 08:00 AM	02/06/2024 02:42 PM	\$0.00	\$0.00	\$0.00	\$0.00
	Description: Annual Fire Alarm Testing								
32820	Preventive			09/09/2024 06:34 AM	09/09/2024 10:00 AM	\$0.00	\$375.00	\$375.00	\$0.00
	Description: Drop off Ranger (Chris) & 2023 Dump (Anthony) to Brad's Auto Reconditioning 300 Commerce Dr. Northbridge, MA 01534 Bring 2012 Dump (Matt) for them to inspect for undercoating and then use to bring everyone home.								
	Task Description: Drop off Truck(s)								
34079	Preventive			10/25/2024 02:58 PM	01/14/2025 09:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
	Description: Change cutting blades on mowers								
	Repair pull cord on 16" chain saw								
	Task Description: Equipment Repair								
35060	Preventive			12/18/2024 06:57 AM	12/19/2024 11:30 AM	\$0.00	\$275.00	\$275.00	\$0.00
	Description: Escort Matt Jacobs the Cross Connection Control Inspector form the Waltham Water & Sewer Division for backflow testing at various properties								
	Task Description: Escort								
35610	Preventive			01/17/2025 01:00 PM	01/17/2025 02:00 PM	\$0.00	\$50.00	\$50.00	\$0.00
	Description: Get and fuel up bobcat.								
	Task Description: Snow prep								
35634	Preventive			01/21/2025 06:59 AM	01/21/2025 03:00 PM	\$0.00	\$750.00	\$750.00	\$0.00

W/O #	Priority	Unit Address	Tenant Name	Created Date	Completed Date	Mat.	Labor	Actual	Billed
Program: State 200									
Project: 200-2 Chesterbrook Gardens									
Description: Check all properties. Scrap & ice melt as needed. Please follow the list in order provided below. Please log start and end time for each property below. (example: 8:10am-8:40am) Upper Pond & School -8:00a-9a Lower Pond -9:00a-9:30 Dale St - 9:20a-9:30 Pine -9:50-10:05a Orange St. - 11:15a checked Myrtle St. - 10:55-11:10a Cedar St - 10:50a all set checked Bright Street - 10:45am all set checked New & Old Grove - 10:10-10:45am Dana Court - Gorman's Court - 11:30-11:35a Carey Court - 11:35-11:40a 300 South St. - 11:15-11:25a Prospect Terrace - 11:40a-11:55a just dermody Chesterbrook Gardens - 2-3p Marguerite Ave - Winchester Crane (To be completed by Joey as part of WC Daily)									
Task Description: Check / scrap / Ice melt all properties									
35685	Preventive	15 Chester Lane Unit: 15	Kandice Aucoin	01/21/2025 09:30 PM	01/21/2025 10:30 PM	\$0.00	\$0.00	\$0.00	\$0.00
Description: Message for 1921 WALTHAM HOUSING AUTHORITY  Message For: OC CELL Taken 21-JAN-25 at 9:27PM by LAT  ----- [NAME] CANDICE AUCOIN [PHONE] 781-249-9056 [ADDRESS] 15 CHESTER LANE [APT#] [MESSAGE] FIRE ALARM IN DAUGHTER'S ROOM GOING OFF [CAN MAINT ENTER?] [GIVEN TO:] [NO HEAT?][NOTATE TEMP HERE] N/A PT 1: 21-JAN-25 09:28 PM RLM 115 7818441202									
35686	Preventive	22 Brookway Road		01/21/2025 12:00 PM	01/21/2025 02:30 PM	\$0.00	\$87.50	\$87.50	\$0.00
Description: Hookup and move 2012 dump plow to CB									
Task Description: Plows									
35730	Preventive			01/22/2025 12:30 PM	01/22/2025 02:00 PM	\$0.00	\$62.50	\$62.50	\$0.00
Description: Hook up new dump plow and bring to to Chester Brook									
Task Description: Move plow									

W/O #	Priority	Unit Address	Tenant Name	Created Date	Completed Date	Mat.	Labor	Actual	Billed
Program: State 200									
Project: 200-2 Chesterbrook Gardens									
35951	Preventive			02/02/2025 08:00 AM	02/12/2025 02:29 PM	\$0.00	\$0.00	\$0.00	\$0.00
	Description: Annual Fire Alarm Testing								
36267	Preventive	22 Brookway Road		02/18/2025 07:30 AM	02/18/2025 03:30 PM	\$0.00	\$250.00	\$250.00	\$0.00
	Description: AM. Free trailer and load Bobcat PM bring trailer and bobcat back								
	Task Description: Move machine								
200-2 Chesterbrook Gardens		Incomplete: 0		Complete: 12		\$0.00	\$1,850.00	\$1,850.00	\$0.00
Project: 200-3 Dana Court (Lowell, Gardner St.)									
27571	Preventive			10/16/2023 08:00 AM	10/24/2023 12:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
	Description: Infra-red scan of all common area breaker panels for hot breakers and exercise all breakers - replace or repair issues as necessary Boiler Room - 10 + 12 - BP - 1 Box - Boiler Room subpanel - #7 13 + 15 Gardner St - R Basement of 15 7, 9, 11 Gardner St - 20 Red - 9 Basement 20, 22, 24 Lowell - 28 - 30 - Basement of 20 Lowell								
29380	Preventive			01/31/2024 08:00 AM	01/31/2024 10:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
	Description: Annual Fire Alarm Testing								
30401	Preventive			04/06/2024 08:00 AM	04/19/2024 12:27 PM	\$0.00	\$0.00	\$0.00	\$0.00
	Description: Replace all fire stops every 60 months (5 yrs)								
33691	Preventive			10/16/2024 08:00 AM	11/12/2024 10:22 AM	\$0.00	\$31.00	\$31.00	\$0.00
	Description: Infra-red scan of all common area breaker panels for hot breakers and exercise all breakers - replace or repair issues as necessary Boiler Room - 10 + 12 - BP - 1 Box - Boiler Room subpanel - #7 13 + 15 Gardner St - R Basement of 15 7, 9, 11 Gardner St - 20 Red - 9 Basement 20, 22, 24 Lowell - 28 - 30 - Basement of 20 Lowell								
	Task Description: Infrared Scanning								



W/O #	Priority	Unit Address	Tenant Name	Created Date	Completed Date	Mat.	Labor	Actual	Billed
Program: State 200									
Project: 200-3 Dana Court (Lowell, Gardner St.)									
35858	Preventive			01/31/2025 08:00 AM	02/12/2025 02:30 PM	\$0.00	\$0.00	\$0.00	\$0.00
	Description: Annual Fire Alarm Testing								
		<b>200-3 Dana Court (Lowell, Gardner St.)</b>	<b>Incomplete: 0</b>	<b>Complete: 5</b>		<b>\$0.00</b>	<b>\$31.00</b>	<b>\$31.00</b>	<b>\$0.00</b>
		<b>State 200</b>	<b>Incomplete: 0</b>	<b>Complete: 31</b>		<b>\$0.00</b>	<b>\$2,540.00</b>	<b>\$2,540.00</b>	<b>\$0.00</b>
Program: State 667									
Project: 667-8: Winchester Crane (101 Prospect St.)									
26534	Preventive	101 Prospect Street		08/07/2023 08:00 AM	08/07/2023 01:12 PM	\$0.00	\$0.00	\$0.00	\$0.00
	Description: Test Bucket truck per Manufactures recommendation								
26605	Preventive	101 Prospect Street		08/14/2023 08:00 AM	08/15/2023 04:53 PM	\$0.00	\$0.00	\$0.00	\$0.00
	Description: Test Bucket truck per Manufactures recommendation								
26636	Preventive			08/15/2023 06:30 AM	09/07/2023 12:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
	Description: Replace boards on rack deck.								
26714	Preventive	101 Prospect Street		08/21/2023 08:00 AM	08/21/2023 08:24 AM	\$0.00	\$0.00	\$0.00	\$0.00
	Description: Test Bucket truck per Manufactures recommendation								
26785	Preventive	101 Prospect Street		08/28/2023 08:00 AM	08/28/2023 02:57 PM	\$0.00	\$0.00	\$0.00	\$0.00
	Description: Test Bucket truck per Manufactures recommendation								
26855	Preventive			09/01/2023 08:00 AM	09/01/2023 11:27 AM	\$0.00	\$0.00	\$0.00	\$0.00
	Description: Flush and jet all drain lines from roof and all clean-outs including ground level out to street								

W/O #	Priority	Unit Address	Tenant Name	Created Date	Completed Date	Mat.	Labor	Actual	Billed
Program: State 667									
Project: 667-8: Winchester Crane (101 Prospect St.)									
26877	Preventive	101 Prospect Street		09/04/2023 08:00 AM	09/05/2023 10:17 AM	\$0.00	\$0.00	\$0.00	\$0.00
		Description: Test Bucket truck per Manufactures recommendation							
26983	Preventive	101 Prospect Street		09/11/2023 08:00 AM	09/11/2023 10:49 AM	\$0.00	\$0.00	\$0.00	\$0.00
		Description: Test Bucket truck per Manufactures recommendation							
27056	Preventive	101 Prospect Street		09/18/2023 08:00 AM	09/19/2023 07:53 AM	\$0.00	\$0.00	\$0.00	\$0.00
		Description: Test Bucket truck per Manufactures recommendation							
27184	Preventive	101 Prospect Street		09/25/2023 08:00 AM	09/28/2023 11:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
		Description: Test Bucket truck per Manufactures recommendation							
27286	Preventive	101 Prospect Street		10/02/2023 08:00 AM	10/04/2023 08:21 AM	\$0.00	\$0.00	\$0.00	\$0.00
		Description: Test Bucket truck per Manufactures recommendation							
27396	Preventive	101 Prospect Street		10/09/2023 08:00 AM	10/10/2023 07:44 AM	\$0.00	\$0.00	\$0.00	\$0.00
		Description: Test Bucket truck per Manufactures recommendation							
27576	Preventive			10/15/2023 08:00 AM	10/20/2023 12:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
		Description: Infra-red scan of all common area breaker panels for hot breakers and excercise all breakers- replace or repair issues as necessary							
27577	Preventive	101 Prospect Street		10/16/2023 08:00 AM	10/17/2023 01:11 PM	\$0.00	\$0.00	\$0.00	\$0.00
		Description: Test Bucket truck per Manufactures recommendation							

W/O #	Priority	Unit Address	Tenant Name	Created Date	Completed Date	Mat.	Labor	Actual	Billed
Program: State 667									
Project: 667-8: Winchester Crane (101 Prospect St.)									
27670	Preventive	101 Prospect Street		10/23/2023 08:00 AM	10/30/2023 08:14 AM	\$0.00	\$0.00	\$0.00	\$0.00
	Description: Test Bucket truck per Manufactures recommendation								
27881	Preventive	101 Prospect Street		10/30/2023 08:00 AM	10/30/2023 10:19 AM	\$0.00	\$0.00	\$0.00	\$0.00
	Description: Test Bucket truck per Manufactures recommendation								
28020	Preventive	101 Prospect Street		11/06/2023 08:00 AM	11/06/2023 02:39 PM	\$0.00	\$0.00	\$0.00	\$0.00
	Description: Test Bucket truck per Manufactures recommendation								
28139	Preventive	101 Prospect Street		11/13/2023 08:00 AM	11/22/2023 09:08 AM	\$0.00	\$0.00	\$0.00	\$0.00
	Description: Test Bucket truck per Manufactures recommendation								
28287	Preventive	101 Prospect Street		11/20/2023 08:00 AM	11/22/2023 09:07 AM	\$0.00	\$0.00	\$0.00	\$0.00
	Description: Test Bucket truck per Manufactures recommendation								
28390	Preventive	101 Prospect Street		11/27/2023 08:00 AM	11/28/2023 09:19 AM	\$0.00	\$0.00	\$0.00	\$0.00
	Description: Test Bucket truck per Manufactures recommendation								
28510	Preventive	101 Prospect Street		12/04/2023 08:00 AM	12/04/2023 07:38 AM	\$0.00	\$0.00	\$0.00	\$0.00
	Description: Test Bucket truck per Manufactures recommendation								
28616	Preventive	101 Prospect Street		12/11/2023 08:00 AM	12/11/2023 09:33 AM	\$0.00	\$0.00	\$0.00	\$0.00
	Description: Test Bucket truck per Manufactures recommendation								

W/O #	Priority	Unit Address	Tenant Name	Created Date	Completed Date	Mat.	Labor	Actual	Billed
Program: State 667									
Project: 667-8: Winchester Crane (101 Prospect St.)									
28721	Preventive	101 Prospect Street		12/15/2023 08:00 AM	03/04/2024 09:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
		Description: Vehicle Oil changes on all 12 vehicles plus complete inspection and Ford Recommended Preventative Maintenance per mileage intervals							
		Bucket Truck - To Cues 3/4/2024 Old Utility - To PSA Old Dump - To PSA Rack Truck - To MPA Painters - Completed New Dump - To PSA Nissan - Transit (Carpenter) - Transit (Plumbers) - 19 Utility - Ranger - N/A White F150 - N/A							
28743	Preventive	101 Prospect Street		12/18/2023 08:00 AM	12/23/2023 11:43 AM	\$0.00	\$0.00	\$0.00	\$0.00
		Description: Test Bucket truck per Manufactures recommendation							
28867	Preventive	101 Prospect Street		12/25/2023 08:00 AM	12/27/2023 03:15 PM	\$0.00	\$0.00	\$0.00	\$0.00
		Description: Test Bucket truck per Manufactures recommendation							
28934	Preventive	101 Prospect Street		01/01/2024 08:00 AM	01/02/2024 08:53 AM	\$0.00	\$0.00	\$0.00	\$0.00
		Description: Test Bucket truck per Manufactures recommendation							
29084	Preventive	101 Prospect Street		01/08/2024 08:00 AM	01/09/2024 08:03 AM	\$0.00	\$0.00	\$0.00	\$0.00
		Description: Test Bucket truck per Manufactures recommendation							
29225	Preventive	101 Prospect Street		01/15/2024 08:00 AM	01/17/2024 11:27 PM	\$0.00	\$0.00	\$0.00	\$0.00
		Description: Test Bucket truck per Manufactures recommendation							

W/O #	Priority	Unit Address	Tenant Name	Created Date	Completed Date	Mat.	Labor	Actual	Billed
Program: State 667									
Project: 667-8: Winchester Crane (101 Prospect St.)									
29317	Preventive	101 Prospect Street		01/22/2024 08:00 AM	01/25/2024 10:47 AM	\$0.00	\$0.00	\$0.00	\$0.00
	Description: Test Bucket truck per Manufactures recommendation								
29382	Preventive	101 Prospect Street		01/29/2024 08:00 AM	01/31/2024 10:31 AM	\$0.00	\$0.00	\$0.00	\$0.00
	Description: Test Bucket truck per Manufactures recommendation								
29477	Preventive	101 Prospect Street		02/05/2024 08:00 AM	02/07/2024 10:45 AM	\$0.00	\$0.00	\$0.00	\$0.00
	Description: Test Bucket truck per Manufactures recommendation								
29577	Preventive	101 Prospect Street		02/12/2024 08:00 AM	02/12/2024 10:03 AM	\$0.00	\$0.00	\$0.00	\$0.00
	Description: Test Bucket truck per Manufactures recommendation								
29682	Preventive	101 Prospect Street		02/19/2024 08:00 AM	02/21/2024 08:02 AM	\$0.00	\$0.00	\$0.00	\$0.00
	Description: Test Bucket truck per Manufactures recommendation								
29760	Preventive	101 Prospect Street		02/26/2024 08:00 AM	03/01/2024 08:30 AM	\$0.00	\$0.00	\$0.00	\$0.00
	Description: Test Bucket truck per Manufactures recommendation								
29885	Preventive	101 Prospect Street		03/04/2024 08:00 AM	03/04/2024 09:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
	Description: Test Bucket truck per Manufactures recommendation								
30007	Preventive	101 Prospect Street		03/11/2024 08:00 AM	03/11/2024 09:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
	Description: Test Bucket truck per Manufactures recommendation								

W/O #	Priority	Unit Address	Tenant Name	Created Date	Completed Date	Mat.	Labor	Actual	Billed
Program: State 667									
Project: 667-8: Winchester Crane (101 Prospect St.)									
30157	Preventive	101 Prospect Street		03/18/2024 08:00 AM	03/19/2024 09:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
	Description: Test Bucket truck per Manufactures recommendation								
30217	Preventive	101 Prospect Street		03/25/2024 08:00 AM	03/25/2024 09:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
	Description: Test Bucket truck per Manufactures recommendation								
30308	Preventive	101 Prospect Street		04/01/2024 08:00 AM	04/01/2024 09:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
	Description: Test Bucket truck per Manufactures recommendation								
30403	Preventive	101 Prospect Street		04/08/2024 08:00 AM	04/08/2024 09:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
	Description: Test Bucket truck per Manufactures recommendation								
30542	Preventive	101 Prospect Street		04/15/2024 08:00 AM	04/16/2024 09:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
	Description: Test Bucket truck per Manufactures recommendation								
30628	Preventive	101 Prospect Street		04/22/2024 08:00 AM	04/22/2024 09:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
	Description: Test Bucket truck per Manufactures recommendation								
30713	Preventive	101 Prospect Street		04/29/2024 08:00 AM	04/29/2024 09:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
	Description: Test Bucket truck per Manufactures recommendation								
30825	Preventive	101 Prospect Street		05/06/2024 08:00 AM	05/06/2024 09:13 AM	\$0.00	\$0.00	\$0.00	\$0.00
	Description: Test Bucket truck per Manufactures recommendation								

W/O #	Priority	Unit Address	Tenant Name	Created Date	Completed Date	Mat.	Labor	Actual	Billed
Program: State 667									
Project: 667-8: Winchester Crane (101 Prospect St.)									
30943	Preventive	101 Prospect Street		05/13/2024 08:00 AM	05/13/2024 09:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
		Description: Test Bucket truck per Manufactures recommendation							
31078	Preventive	101 Prospect Street		05/20/2024 08:00 AM	05/20/2024 09:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
		Description: Test Bucket truck per Manufactures recommendation							
31159	Preventive	101 Prospect Street		05/27/2024 08:00 AM	05/27/2024 09:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
		Description: Test Bucket truck per Manufactures recommendation							
31233	Preventive	101 Prospect Street Unit: 304	Krystie Whittemore	05/30/2024 08:00 AM	05/30/2024 08:30 AM	\$0.00	\$25.00	\$25.00	\$0.00
		Description: Caulk around toilet and spray foam drain penetration under sink.							
		Task Description: Caulk and Spray Foam							
31254	Preventive	101 Prospect Street		06/03/2024 08:00 AM	06/03/2024 09:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
		Description: Test Bucket truck per Manufactures recommendation							
31376	Preventive	101 Prospect Street		06/10/2024 08:00 AM	06/10/2024 09:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
		Description: Test Bucket truck per Manufactures recommendation							
31451	Preventive	101 Prospect Street		06/17/2024 08:00 AM	06/18/2024 09:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
		Description: Test Bucket truck per Manufactures recommendation							

W/O #	Priority	Unit Address	Tenant Name	Created Date	Completed Date	Mat.	Labor	Actual	Billed
Program: State 667									
Project: 667-8: Winchester Crane (101 Prospect St.)									
31452	Preventive	101 Prospect Street		06/15/2024 08:00 AM	06/17/2024 09:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
	Description: Vehicle Oil changes on all 12 vehicles plus complete inspection and Ford Recommended Preventative Maintenance per mileage intervals								
	Bucket Truck / Old Utility / Box Truck / Old Dump / Expedition / Rack Truck								
	Diesel / Painters / New Dump / Nissan / Transit / 19 Utility								
31576	Preventive	101 Prospect Street		06/24/2024 08:00 AM	06/24/2024 09:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
	Description: Test Bucket truck per Manufactures recommendation								
31717	Preventive	101 Prospect Street		07/01/2024 08:00 AM	07/01/2024 04:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
	Description: Test Bucket truck per Manufactures recommendation								
	Task Description: Test Bucket Truck								
31787	Preventive	101 Prospect Street		07/08/2024 08:00 AM	07/08/2024 04:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
	Description: Test Bucket truck per Manufactures recommendation								
	Task Description: Test Bucket Truck								
31910	Preventive	101 Prospect Street		07/15/2024 08:00 AM	07/15/2024 09:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
	Description: Test Bucket truck per Manufactures recommendation								
32035	Preventive	101 Prospect Street		07/22/2024 08:00 AM	07/22/2024 09:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
	Description: Test Bucket truck per Manufactures recommendation								
32133	Preventive	101 Prospect Street		07/29/2024 08:00 AM	07/29/2024 09:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
	Description: Test Bucket truck per Manufactures recommendation								



W/O #	Priority	Unit Address	Tenant Name	Created Date	Completed Date	Mat.	Labor	Actual	Billed
Program: State 667									
Project: 667-8: Winchester Crane (101 Prospect St.)									
32254	Preventive	101 Prospect Street		08/05/2024 08:00 AM	08/07/2024 09:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
		Description: Test Bucket truck per Manufactures recommendation							
32375	Preventive	101 Prospect Street		08/12/2024 08:00 AM	08/12/2024 09:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
		Description: Test Bucket truck per Manufactures recommendation							
32488	Preventive	101 Prospect Street		08/19/2024 08:00 AM	08/19/2024 09:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
		Description: Test Bucket truck per Manufactures recommendation							
32602	Preventive	101 Prospect Street		08/26/2024 08:00 AM	08/26/2024 01:35 PM	\$0.00	\$37.50	\$37.50	\$0.00
		Description: Test Bucket truck per Manufactures recommendation							
		Task Description: Test Bucket Truck							
32698	Preventive	101 Prospect Street		09/02/2024 08:00 AM	09/02/2024 09:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
		Description: Test Bucket truck per Manufactures recommendation							
32699	Preventive			09/01/2024 08:00 AM	09/26/2024 08:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
		Description: Flush and jet all drain lines from roof and all clean-outs including ground level out to street							
32819	Preventive	101 Prospect Street		09/09/2024 08:00 AM	09/09/2024 09:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
		Description: Test Bucket truck per Manufactures recommendation							
32941	Preventive	101 Prospect Street		09/16/2024 08:00 AM	09/16/2024 09:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
		Description: Test Bucket truck per Manufactures recommendation							

W/O #	Priority	Unit Address	Tenant Name	Created Date	Completed Date	Mat.	Labor	Actual	Billed
Program: State 667									
Project: 667-8: Winchester Crane (101 Prospect St.)									
33103	Preventive	101 Prospect Street		09/23/2024 08:00 AM	09/23/2024 09:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
		Description: Test Bucket truck per Manufactures recommendation							
33270	Preventive	101 Prospect Street		09/30/2024 08:00 AM	09/30/2024 09:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
		Description: Test Bucket truck per Manufactures recommendation							
33413	Preventive	101 Prospect Street		10/07/2024 08:00 AM	10/07/2024 09:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
		Description: Test Bucket truck per Manufactures recommendation							
33653	Preventive			10/15/2024 08:00 AM	11/12/2024 03:44 PM	\$0.00	\$18.50	\$18.50	\$0.00
		Description: Infra-red scan of all common area breaker panels for hot breakers and excercise all breakers- replace or repair issues as necessary							
		Task Description: Infrared Scanning							
33654	Preventive	101 Prospect Street		10/14/2024 08:00 AM	10/14/2024 09:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
		Description: Test Bucket truck per Manufactures recommendation							
33889	Preventive	101 Prospect Street		10/21/2024 08:00 AM	10/21/2024 09:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
		Description: Test Bucket truck per Manufactures recommendation							
34092	Preventive	101 Prospect Street		10/28/2024 08:00 AM	10/28/2024 09:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
		Description: Test Bucket truck per Manufactures recommendation							
34211	Preventive	101 Prospect Street		11/04/2024 08:00 AM	11/04/2024 09:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
		Description: Test Bucket truck per Manufactures recommendation							

W/O #	Priority	Unit Address	Tenant Name	Created Date	Completed Date	Mat.	Labor	Actual	Billed
Program: State 667									
Project: 667-8: Winchester Crane (101 Prospect St.)									
34339	Preventive	101 Prospect Street		11/11/2024 08:00 AM	11/13/2024 09:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
	Description: Test Bucket truck per Manufactures recommendation								
34510	Preventive	101 Prospect Street		11/18/2024 08:00 AM	11/18/2024 01:00 PM	\$0.00	\$12.50	\$12.50	\$0.00
	Description: Test Bucket truck per Manufactures recommendation								
	Task Description: Test Bucket Truck								
34649	Preventive	101 Prospect Street		11/25/2024 08:00 AM	11/25/2024 09:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
	Description: Test Bucket truck per Manufactures recommendation								
34742	Preventive	101 Prospect Street		12/02/2024 08:00 AM	12/05/2024 09:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
	Description: Test Bucket truck per Manufactures recommendation								
34823	Preventive			12/05/2024 02:42 PM	12/05/2024 02:42 PM	\$0.00	\$50.00	\$50.00	\$0.00
	Description: Label and move plows								
	Task Description: Plows								
34857	Preventive	101 Prospect Street		12/09/2024 08:00 AM	12/09/2024 09:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
	Description: Test Bucket truck per Manufactures recommendation								
35005	Preventive	101 Prospect Street		12/16/2024 08:00 AM	12/16/2024 09:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
	Description: Test Bucket truck per Manufactures recommendation								
35019	Preventive	101 Prospect Street		12/16/2024 01:00 PM	12/16/2024 02:15 PM	\$0.00	\$0.00	\$0.00	\$0.00
	Description: Start and check functions of sow blowers.								

W/O #	Priority	Unit Address	Tenant Name	Created Date	Completed Date	Mat.	Labor	Actual	Billed
Program: State 667									
Project: 667-8: Winchester Crane (101 Prospect St.)									
35152	Preventive	101 Prospect Street		12/23/2024 08:00 AM	12/23/2024 02:30 PM	\$0.00	\$0.00	\$0.00	\$0.00
	Description: Test Bucket truck per Manufactures recommendation Check the tire pressure Check that all lights are working properly Check the emergency brake Check the structural and mechanical integrity of the truck Check that controls are clearly marked to their function Test the lift controls Check that the first aid kit, fire extinguisher, and harness are on board and in good condition Task Description: Weekly Bucket Inspection								
35217	Preventive	101 Prospect Street		12/30/2024 08:00 AM	01/03/2025 02:42 PM	\$0.00	\$0.00	\$0.00	\$0.00
	Description: MONDAY Test Bucket truck per Manufactures recommendation Check the tire pressure Check that all lights are working properly Check the emergency brake Check the structural and mechanical integrity of the truck Check that controls are clearly marked to their function Test the lift controls Check that the first aid kit, fire extinguisher, and harness are on board and in good condition Task Description: Test Bucket Truck								
35311	Preventive	101 Prospect Street		01/02/2025 03:41 PM	01/02/2025 03:42 PM	\$0.00	\$50.00	\$50.00	\$0.00
	Description: Clean lube key machine fill 19 utility Task Description: Filltruck								
35347	Preventive	101 Prospect Street		01/06/2025 08:00 AM	01/06/2025 02:30 PM	\$0.00	\$16.50	\$16.50	\$0.00
	Description: Test Bucket truck per Manufactures recommendation Check the tire pressure Check that all lights are working properly Check the emergency brake Check the structural and mechanical integrity of the truck Check that controls are clearly marked to their function Test the lift controls Check that the first aid kit, fire extinguisher, and harness are on board and in good condition Task Description: Test Bucket Truck								
35499	Preventive	101 Prospect Street		01/13/2025 08:00 AM	01/13/2025 02:30 PM	\$0.00	\$25.00	\$25.00	\$0.00

W/O #	Priority	Unit Address	Tenant Name	Created Date	Completed Date	Mat.	Labor	Actual	Billed
Program: State 667									
Project: 667-8: Winchester Crane (101 Prospect St.)									
		Description: Test Bucket truck per Manufactures recommendation Check the tire pressure Check that all lights are working properly Check the emergency brake Check the structural and mechanical integrity of the truck Check that controls are clearly marked to their function Test the lift controls Check that the first aid kit, fire extinguisher, and harness are on board and in good condition Task Description: Test Bucket Truck today							
35630	Preventive	101 Prospect Street		01/20/2025 08:00 AM	01/21/2025 03:30 PM	\$0.00	\$37.50	\$37.50	\$0.00
		Description: Test Bucket truck per Manufactures recommendation Check the tire pressure Check that all lights are working properly Check the emergency brake Check the structural and mechanical integrity of the truck Check that controls are clearly marked to their function Test the lift controls Check that the first aid kit, fire extinguisher, and harness are on board and in good condition Task Description: Test Bucket Truck							
35748	Preventive			01/23/2025 06:28 AM	01/23/2025 11:00 AM	\$0.00	\$75.00	\$75.00	\$0.00
		Description: K9 Inspection of all units (Bed Bugs) Task Description: K9 Inspections							
35789	Preventive	101 Prospect Street		01/27/2025 08:00 AM	01/27/2025 03:15 PM	\$0.00	\$25.00	\$25.00	\$0.00
		Description: Test Bucket truck per Manufactures recommendation Check the tire pressure Check that all lights are working properly Check the emergency brake Check the structural and mechanical integrity of the truck Check that controls are clearly marked to their function Test the lift controls Check that the first aid kit, fire extinguisher, and harness are on board and in good condition Task Description: Test Bucket Truck							

W/O #	Priority	Unit Address	Tenant Name	Created Date	Completed Date	Mat.	Labor	Actual	Billed
Program: State 667									
Project: 667-8: Winchester Crane (101 Prospect St.)									
35947	Preventive	101 Prospect Street		02/03/2025 08:00 AM	02/04/2025 03:30 PM	\$0.00	\$25.00	\$25.00	\$0.00
	Description: Test Bucket truck per Manufactures recommendation Check the tire pressure Check that all lights are working properly Check the emergency brake Check the structural and mechanical integrity of the truck Check that controls are clearly marked to their function Test the lift controls Check that the first aid kit, fire extinguisher, and harness are on board and in good condition Task Description: Test Bucket Truck								
36105	Preventive	101 Prospect Street		02/10/2025 08:00 AM	02/10/2025 09:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
	Description: Test Bucket truck per Manufactures recommendation Check the tire pressure Check that all lights are working properly Check the emergency brake Check the structural and mechanical integrity of the truck Check that controls are clearly marked to their function Test the lift controls Check that the first aid kit, fire extinguisher, and harness are on board and in good condition								
36205	Preventive	101 Prospect Street		02/17/2025 08:00 AM	02/17/2025 09:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
	Description: Test Bucket truck per Manufactures recommendation Check the tire pressure Check that all lights are working properly Check the emergency brake Check the structural and mechanical integrity of the truck Check that controls are clearly marked to their function Test the lift controls Check that the first aid kit, fire extinguisher, and harness are on board and in good condition								
36236	Preventive			02/14/2025 10:00 AM	02/14/2025 11:34 AM	\$0.00	\$50.00	\$50.00	\$0.00
	Description: Fix sweeper wheels Gas up truck and gas containers Task Description: Snow prep								
36269	Preventive	101 Prospect Street		02/18/2025 07:30 AM	02/18/2025 02:14 PM	\$0.00	\$62.50	\$62.50	\$0.00
	Description: Snow removal of parking lot Task Description: Snow removal								

W/O #	Priority	Unit Address	Tenant Name	Created Date	Completed Date	Mat.	Labor	Actual	Billed
Program: State 667									
Project: 667-8: Winchester Crane (101 Prospect St.)									
36332	Preventive	101 Prospect Street		02/24/2025 08:00 AM	02/24/2025 09:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
	Description: Test Bucket truck per Manufactures recommendation Check the tire pressure Check that all lights are working properly Check the emergency brake Check the structural and mechanical integrity of the truck Check that controls are clearly marked to their function Test the lift controls Check that the first aid kit, fire extinguisher, and harness are on board and in good condition								
36465	Preventive	101 Prospect Street		03/03/2025 08:00 AM	03/03/2025 09:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
	Description: Test Bucket truck per Manufactures recommendation Check the tire pressure Check that all lights are working properly Check the emergency brake Check the structural and mechanical integrity of the truck Check that controls are clearly marked to their function Test the lift controls Check that the first aid kit, fire extinguisher, and harness are on board and in good condition								
667-8: Winchester Crane (101 Prospect St.)		Incomplete: 0		Complete: 97		\$0.00	\$510.00	\$510.00	\$0.00
Project: 667-1 Carey Court- 269-279 School St.									
27392	Preventive	269-273 School Street		10/05/2023 08:00 AM	10/05/2023 10:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
	Description: Anode; Check/Replace if needed all 4 anode rods, 2 per Lochnivar HW								
27393	Preventive	275-279 School Street		10/05/2023 08:00 AM	10/05/2023 10:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
	Description: Anode; Check/Replace if needed all 4 anode rods, 2 per Lochnivar HW								
27595	Preventive			10/17/2023 08:00 AM	10/20/2023 12:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
	Description: Infra-red scan of all common area breaker panels for hot breakers and exercise all breakers - replace or repair issues as necessary 269-273 School St - Boiler Room 275-279 School St - Boiler Room								

W/O #	Priority	Unit Address	Tenant Name	Created Date	Completed Date	Mat.	Labor	Actual	Billed
Program: State 667									
Project: 667-1 Carey Court- 269-279 School St.									
33768	Preventive			10/17/2024 08:00 AM	11/12/2024 08:32 AM	\$0.00	\$13.50	\$13.50	\$0.00
	Description: Infra-red scan of all common area breaker panels for hot breakers and exercise all breakers - replace or repair issues as necessary 269-273 School St - Boiler Room 275-279 School St - Boiler Room Task Description: Scan & Exercise Breakers								
35379	Preventive	269-273 School Street		01/06/2025 03:51 PM	01/06/2025 03:53 PM	\$0.00	\$75.00	\$75.00	\$0.00
	Description: Check empty units Task Description: Check heat								
667-1 Carey Court- 269-279 School St.		Incomplete: 0		Complete: 5		\$0.00	\$88.50	\$88.50	\$0.00
Project: 667-2 Beaver Brook Apts (old grove) 298-324									
27572	Preventive			10/15/2023 08:00 AM	10/24/2023 12:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
	Description: Infra-red scan of all common area breaker panels for hot breakers and exercise all breakers - replace or repair issues as necessary Boiler Room 1 Boiler Room 2 298 302 310 312								
33648	Preventive			10/15/2024 08:00 AM	11/12/2024 11:50 AM	\$0.00	\$32.50	\$32.50	\$0.00
	Description: Infra-red scan of all common area breaker panels for hot breakers and exercise all breakers - replace or repair issues as necessary Boiler Room 1 Boiler Room 2 298 302 310 312 Task Description: Infrared Scanning								
667-2 Beaver Brook Apts (old grove) 298-324		Incomplete: 0		Complete: 2		\$0.00	\$32.50	\$32.50	\$0.00
Project: 667-3 Myrtle Street (75-85)									
27573	Preventive			10/15/2023 08:00 AM	10/24/2023 12:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
	Description: Infra-red scan of all common area breaker panels for hot breakers and exercise all breakers - replace or repair issues as necessary								



W/O #	Priority	Unit Address	Tenant Name	Created Date	Completed Date	Mat.	Labor	Actual	Billed
Program: State 667									
Project: 667-3 Myrtle Street (75-85)									
33649	Preventive			10/15/2024 08:00 AM	11/12/2024 01:20 PM	\$0.00	\$16.50	\$16.50	\$0.00
	Description: Infra-red scan of all common area breaker panels for hot breakers and exercise all breakers - replace or repair issues as necessary								
	Task Description: Infrared Scanning								
667-3 Myrtle Street (75-85)		Incomplete: 0		Complete: 2		\$0.00	\$16.50	\$16.50	\$0.00
Project: 667-4 Whalen Apts- (82-86 Orange St.)									
27574	Preventive			10/15/2023 08:00 AM	10/20/2023 12:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
	Description: Infra-red scan of all common area breaker panels for hot breakers and exercise all breakers - replace or repair issues as necessary								
	82 Orange St								
	86 Orange St								
	Both are in back stairwell								
	Fire Panel Room								
31718	Preventive			07/01/2024 06:24 AM	07/29/2024 03:30 PM	\$0.00	\$1,900.00	\$1,900.00	\$0.00
	Description: Heat Pump Condenser Cleaning								
	(Shaw will be there to Demo/Train @ 8am)								
	Task Description: Heat Pump Condenser Cleaning								
33650	Preventive			10/15/2024 08:00 AM	11/12/2024 01:00 PM	\$0.00	\$12.50	\$12.50	\$0.00
	Description: Infra-red scan of all common area breaker panels for hot breakers and exercise all breakers - replace or repair issues as necessary								
	82 Orange St								
	86 Orange St								
	Both are in back stairwell								
	Fire Panel Room								
	Task Description: Infrared Scanning								
667-4 Whalen Apts- (82-86 Orange St.)		Incomplete: 0		Complete: 3		\$0.00	\$1,912.50	\$1,912.50	\$0.00
State 667		Incomplete: 0		Complete: 109		\$0.00	\$2,560.00	\$2,560.00	\$0.00

W/O #	Priority	Unit Address	Tenant Name	Created Date	Completed Date	Mat.	Labor	Actual	Billed
Program: State 667-9									
Project: 667-9 -300 South St. (Congregate Housing)									
27401	Preventive	300 South Street		10/05/2023 08:00 AM	10/06/2023 05:30 AM	\$0.00	\$0.00	\$0.00	\$0.00
	Description: Anode; Check/Replace if needed all 4 anode rods, 2 per Lochnivar HW tank								
27579	Preventive			10/15/2023 08:00 AM	03/11/2024 10:48 AM	\$0.00	\$0.00	\$0.00	\$0.00
	Description: Infra-red scan of all common area breaker panels for hot breakers and exercise all breakers - replace or repair issues as necessary Sprinkler Control Room								
29912	Preventive			03/06/2024 08:00 AM	03/06/2024 08:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
	Description: Annual Fire Alarm Testing								
33656	Preventive			10/15/2024 08:00 AM	11/12/2024 09:16 AM	\$0.00	\$16.50	\$16.50	\$0.00
	Description: Infra-red scan of all common area breaker panels for hot breakers and exercise all breakers - replace or repair issues as necessary Sprinkler Control Room								
	Task Description: Infrared Scanning								
35749	Preventive			01/23/2025 06:42 AM	01/23/2025 12:00 PM	\$0.00	\$50.00	\$50.00	\$0.00
	Description: K9 Inspection of all units (Bed Bugs)								
	Task Description: K9 Inspection								
667-9 -300 South St. (Congregate Housing)		Incomplete: 0		Complete: 5		\$0.00	\$66.50	\$66.50	\$0.00
State 667-9		Incomplete: 0		Complete: 5		\$0.00	\$66.50	\$66.50	\$0.00
Program: State 667-7									
Project: 667-7 -Banks St.(37)									
27578	Preventive			10/15/2023 08:00 AM	03/11/2024 03:02 PM	\$0.00	\$0.00	\$0.00	\$0.00
	Description: Infra-red scan of all common area breaker panels for hot breakers and excercise all breakers- replace or repair issues as necessary								
667-7 -Banks St.(37)		Incomplete: 0		Complete: 1		\$0.00	\$0.00	\$0.00	\$0.00
State 667-7		Incomplete: 0		Complete: 1		\$0.00	\$0.00	\$0.00	\$0.00

W/O #	Priority	Unit Address	Tenant Name	Created Date	Completed Date	Mat.	Labor	Actual	Billed
Program: State 689-1									
Project: 689-1 - Townsend St.(15)									
27580	Preventive			10/15/2023 08:00 AM	03/11/2024 10:06 AM	\$0.00	\$0.00	\$0.00	\$0.00
	Description: Infra-red scan of all common area breaker panels for hot breakers and excercise all breakers- replace or repair issues as necessary								
689-1 - Townsend St.(15)		Incomplete: 0		Complete: 1		\$0.00	\$0.00	\$0.00	\$0.00
State 689-1		Incomplete: 0		Complete: 1		\$0.00	\$0.00	\$0.00	\$0.00
Program: State 689-3									
Project: 689-3 - South St (284)									
27581	Preventive			10/15/2023 08:00 AM	03/11/2024 10:49 AM	\$0.00	\$0.00	\$0.00	\$0.00
	Description: Infra-red scan of all common area breaker panels for hot breakers and excercise all breakers- replace or repair issues as necessary								
689-3 - South St (284)		Incomplete: 0		Complete: 1		\$0.00	\$0.00	\$0.00	\$0.00
State 689-3		Incomplete: 0		Complete: 1		\$0.00	\$0.00	\$0.00	\$0.00
Program: State 705									
Project: 705-2 - Bright Street (113-119 )									
27582	Preventive			10/15/2023 08:00 AM	10/20/2023 12:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
	Description: Infra-red scan of all common area breaker panels for hot breakers and excercise all breakers- replace or repair issues as necessary								
30404	Preventive			04/06/2024 08:00 AM	04/25/2024 04:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
	Description: Replace all fire stops every 60 months (5 yrs)								
33659	Preventive			10/15/2024 08:00 AM	11/12/2024 02:00 PM	\$0.00	\$16.50	\$16.50	\$0.00
	Description: Infra-red scan of all common area breaker panels for hot breakers and excercise all breakers- replace or repair issues as necessary								
	Task Description: Infrared Scanning								
705-2 - Bright Street (113-119 )		Incomplete: 0		Complete: 3		\$0.00	\$16.50	\$16.50	\$0.00

W/O #	Priority	Unit Address	Tenant Name	Created Date	Completed Date	Mat.	Labor	Actual	Billed
Program: State 705									
Project: 705-2A - South Street (288-298)									
27583	Preventive			10/15/2023 08:00 AM	03/11/2024 10:50 AM	\$0.00	\$0.00	\$0.00	\$0.00
	Description: Infra-red scan of all common area breaker panels for hot breakers and excercise all breakers- outside NOT IN UNIT replace or repair issues as necessary								
30405	Preventive			04/06/2024 08:00 AM	04/19/2024 12:24 PM	\$0.00	\$0.00	\$0.00	\$0.00
	Description: Replace all fire stops every 60 months (5 yrs)								
705-2A - South Street (288-298)		Incomplete: 0		Complete: 2		\$0.00	\$0.00	\$0.00	\$0.00
Project: 705-3 New Grove Street (326-340)									
27584	Preventive			10/15/2023 08:00 AM	03/11/2024 09:29 AM	\$0.00	\$0.00	\$0.00	\$0.00
	Description: Infra-red scan of all common area breaker panels for hot breakers and excercise all breakers- exterior ONLY DO NOT ENTER UNIT replace or repair issues as necessary								
30406	Preventive			04/06/2024 08:00 AM	04/19/2024 12:26 PM	\$0.00	\$0.00	\$0.00	\$0.00
	Description: Replace all fire stops every 60 months (5 yrs)								
705-3 New Grove Street (326-340)		Incomplete: 0		Complete: 2		\$0.00	\$0.00	\$0.00	\$0.00
Project: 705-5 - Marguerite Ave (35-45)									
27585	Preventive			10/15/2023 08:00 AM	03/11/2024 11:38 AM	\$0.00	\$0.00	\$0.00	\$0.00
	Description: Infra-red scan of all common area breaker panels for hot breakers and excercise all breakers- EXTERIOR ONLY DO NOT ENTER UNIT replace or repair issues as necessary								
30407	Preventive			04/06/2024 08:00 AM	04/19/2024 12:26 PM	\$0.00	\$0.00	\$0.00	\$0.00
	Description: Replace all fire stops every 60 months (5 yrs)								
705-5 - Marguerite Ave (35-45)		Incomplete: 0		Complete: 2		\$0.00	\$0.00	\$0.00	\$0.00
State 705		Incomplete: 0		Complete: 9		\$0.00	\$16.50	\$16.50	\$0.00
Grand Totals:		Incomplete: 0		Complete: 157		\$0.00	\$5,183.00	\$5,183.00	\$0.00
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Work Order Number	Address	Entered Date	Deferred Date	Work Order Description	Reason Deferred	Deferred Type
8192		1/3/2020	1/15/2025	Construction of a brand new Computer Learning Center at Prospect Hill Terrace.	Dependent on funding	Capital Improvement Plan
8199		8/3/2018	6/1/2024	20 Brookway Rd New Computer Center Building (Capital)	Dependent on funding	Capital Improvement Plan
8200		4/25/2019	4/25/2024	Roof Replacement - Multiple Roofs - 200-01-CPA (Capital)	Dependent on funding	Capital Improvement Plan
8209		7/24/2019	7/1/2024	ADA Upgrades - Reasonable Accommodation Request - On Site (Capital)	Dependent on funding	Capital Improvement Plan
8210		10/3/2019	7/1/2024	Replace bulkheads	Dependent on funding	Capital Improvement Plan
8212		12/11/2019	12/1/2024	Roof Replacement - Multiple Roofs - Membrane Roof Replacement - CPA (Capital)	Dependent on funding	Capital Improvement Plan
8213		11/15/2018	11/1/2023	Fully Accessible Unit - ADA - Bump-outs - CR Request (Capital)	Dependent on funding	Capital Improvement Plan
8214		4/3/2019	4/1/2024	Replace Boilers - ABCD - Hammond (Capital)	Dependent on funding	Capital Improvement Plan
8217		7/1/2019	7/1/2024	Tree Trimming - Dev Wide 200-01 (Capital)	Dependent on funding	Capital Improvement Plan
8218		7/1/2019	7/1/2024	Kitchen Upgrade - Misc maintenance (Capital)	Dependent on funding	Capital Improvement Plan
8219		7/2/2019	7/2/2024	Road and walkway patch & repair - 200-02 (Capital)	Dependent on funding	Capital Improvement Plan
8220		7/1/2019	7/1/2024	Kitchen-Bathroom modernization - Phase 1 DC (Capital)	Dependent on funding	Capital Improvement Plan
17934	6G Hansen Road Unit: 6G	12/14/2021	10/1/2023	Unit Inspection: Tub finish worn	Deferred due to budget constraints	Deferred Maintenance Plan
18008	1 Brookway Court Unit: 1	12/16/2021	10/1/2023	Bathroom tub finish is worn (from inspection on 9/21/18)	Deferred due to budget constraints	Deferred Maintenance Plan
18283	22C Hansen Road Unit: 22C	1/10/2022	10/1/2023	Unit Inspection: Tub needs to be glazed. Pictures	Deferred due to budget constraints	Deferred Maintenance Plan
18286	22E Hansen Road Unit: 22E	1/10/2022	10/1/2023	Unit Inspection: Tub finish worn. Pictures	Deferred due to budget constraints	Deferred Maintenance Plan
18291	34A Hansen Road Unit: 34A	1/10/2022	10/1/2023	Unit Inspection: Tub finish worn	Deferred due to budget constraints	Deferred Maintenance Plan
18426	310-1 Grove Street Unit: 310-1	1/13/2022	10/1/2023	Unit Inspection: Double sink flaking.	Deferred due to budget constraints	Deferred Maintenance Plan
18691	63H Hansen Road Unit: 63H	2/1/2022	10/1/2023	Tub needs reglazing	Deferred due to budget constraints	Deferred Maintenance Plan
18704	32A Dermody Road Unit: 32A	2/2/2022	10/1/2023	Unit Inspection: Tub finish peeling.pictures	Deferred due to budget constraints	Deferred Maintenance Plan

Work Order Number	Address	Entered Date	Deferred Date	Work Order Description	Reason Deferred	Deferred Type
19055	108G Prospect Hill Road Unit: 108G	3/1/2022	10/1/2023	Unit Inspection: Tub finish worn. pictures	Deferred due to budget constraints	Deferred Maintenance Plan
19612	5B Dermody Road Unit: 5B	4/7/2022	10/1/2023	Unit Inspection: Chips and rust on tub..pictures	Deferred due to budget constraints	Deferred Maintenance Plan
19629	15A Dermody Road Unit: 15A	4/7/2022	10/1/2023	Tub finish worn. pictures	Deferred due to budget constraints	Deferred Maintenance Plan
21833	2 Brookway Court Unit: 2	9/12/2022	10/1/2023	Bathroom: Tub chip/rust pictures	Deferred due to budget constraints	Deferred Maintenance Plan
22264	82 G Orange Street Unit: 82 G	10/4/2022	10/1/2023	Bathroom: Tub finish worn.pictures	Deferred due to budget constraints	Deferred Maintenance Plan
22380	3 Chester Lane Unit: 3	10/12/2022	10/1/2023	Bathroom: Tub finish worn.pictures	Deferred due to budget constraints	Deferred Maintenance Plan
22986	43 Chester Lane Unit: 43	11/22/2022	3/8/2024	Kitchen: Screen door closer falling off 5/31/23 - Randy assessed, needs new storm door		Deferred Maintenance Plan
22988	45 Chester Lane Unit: 45	11/22/2022	7/1/2024	Living Room: Both screen door closer missing 5/31/23 - Randy assessed, needs new entry door and storm door		Deferred Maintenance Plan
23046	88 Chester Lane Unit: 88	11/23/2022	7/1/2024	Living Room: Screen door closer falling off - Randy removed storm door, needs new 5/31/23		Deferred Maintenance Plan
23226	68E Prospect Hill Road Unit: 68E	12/8/2022	10/1/2023	Bathroom: Tub finish worn.pictures	D	Deferred Maintenance Plan
23227	6F Hansen Road Unit: 6F	12/8/2022	10/1/2023	Bathroom: Tub finish worn.pictures	Deferred due to budget constraints	Deferred Maintenance Plan
23228	68F Prospect Hill Road Unit: 68F	12/8/2022	10/1/2023	Bathroom: Tub finish worn.pictures	Deferred due to budget constraints	Deferred Maintenance Plan

Work Order Number	Address	Entered Date	Deferred Date	Work Order Description	Reason Deferred	Deferred Type
23249	46A Prospect Hill Road Unit: 46A	12/9/2022	10/1/2023	Bathroom: Tub finish worn.pictures	Deferred due to budget constraints	Deferred Maintenance Plan
23261	42A Prospect Hill Road Unit: 42A	12/9/2022	10/1/2023	Bathroom: Tub finish worn.pictures	Deferred due to budget constraints	Deferred Maintenance Plan
23265	7C Hansen Road Unit: 7C	12/9/2022	10/1/2023	Bathroom: Tub finish worn.pictures	Deferred due to budget constraints	Deferred Maintenance Plan
23374	300 South Street Unit: T	12/19/2022	12/1/2023	Building Common Areas Inspection: Tiles broken back stairs.pictures Building Common Areas Inspection: Multiple areas of broken tiles.pictures	This will be done as a Capital Project	Capital Improvement Plan
25024	22F Dermody Road Unit: 22F	4/10/2023	9/1/2023	Kitchen: Screen door closer missing	To be done as a project	Deferred Maintenance Plan
25039	25B Dermody Road Unit: 25B	4/11/2023	9/1/2023	Kitchen: No filter on vent hood	To be done as a project	Deferred Maintenance Plan
25040	25C Dermody Road Unit: 25C	4/11/2023	9/1/2023	Living Room: Screen door closer missing	To be done as a project	Deferred Maintenance Plan
25064	7D Dermody Road Unit: 7D	4/11/2023	9/1/2023	Living Room: Screen door closer missing	To be done as a project	Deferred Maintenance Plan
25067	15A Dermody Road Unit: 15A	4/11/2023	9/1/2023	Living Room: Screen door closer missing	To be done as a project	Deferred Maintenance Plan
25074	15C Dermody Road Unit: 15C	4/11/2023	9/1/2023	Kitchen: Screen door closer missing	To be done as a project	Deferred Maintenance Plan
25078	15D Dermody Road Unit: 15D	4/11/2023	9/1/2023	Kitchen: Hood filter missing	To be done as a project	Deferred Maintenance Plan
25419	15-1 Gardner Street Unit: 15-1	5/5/2023	4/1/2024	Building Systems Inspection: Copper pipes oxidized in basement bad. pictures		Capital Improvement Plan

Work Order Number	Address	Entered Date	Deferred Date	Work Order Description	Reason Deferred	Deferred Type
26018		7/1/2023	8/1/2024	Isolate Sparaco strainer before each units 2 zone valves in crawl space of each building and drain down flush sediment out of y pocket at bottom.  Reassemble and turn on water supply. Check at draw off have full flow repeat if necessary. 140 Units. Pictures and cut sheet attached in work order documents	Over budget needs funding	Deferred Maintenance Plan
26019		7/1/2023	7/1/2024	All buildings in crawl spaces exercise all check valves thumb screws and drain down at low point draw off of supply and return for sludge/sediment build up.	once heating season is complete	Deferred Maintenance Plan
26907	853 Lexington Street Unit: 853	9/5/2023	7/1/2024	Living Room: Front screen door ripped	Will be done as a project	Deferred Maintenance Plan
27361	23 Chester Lane Unit: 23	10/3/2023	6/1/2024	Kitchen: Screen door handle broken	project	Deferred Maintenance Plan
27406	2 Chester Lane Unit: 2	10/4/2023	7/1/2024	Kitchen: Screen door closer missing	Will be done as a project	Deferred Maintenance Plan
28218	65 Chester Lane Unit: 65	11/15/2023	7/1/2024	Living Room: Screen door closer missing	To be done as a project	Deferred Maintenance Plan
28233	68 Chester Lane Unit: 68	11/16/2023	7/1/2024	Kitchen: Screen door closer missing	To be done as a project	Deferred Maintenance Plan
28816	7B Hansen Road Unit: 7B	12/20/2023	7/1/2024	Living Room: Screen door closer missing	To be done as a project	Deferred Maintenance Plan
28832	46C Prospect Hill Road Unit: 46C	12/20/2023	7/1/2024	Living Room: Screen door closer missing	To be done as a project	Deferred Maintenance Plan
29063	22A Hansen Road Unit: 22A	1/8/2024	7/1/2024	Kitchen: screen door closer missing	project	Deferred Maintenance Plan
29065	22C Hansen Road Unit: 22C	1/8/2024	7/1/2024	Kitchen: screen door closer missing	project	Deferred Maintenance Plan



Work Order Number	Address	Entered Date	Deferred Date	Work Order Description	Reason Deferred	Deferred Type
29072	34B Hansen Road Unit: 34B	1/8/2024	7/1/2024	Kitchen: Screen door closer missing	project	Deferred Maintenance Plan
29076	34D Hansen Road Unit: 34D	1/8/2024	7/1/2024	Kitchen: Screen door closer missing	project	Deferred Maintenance Plan
29095	66B Hansen Road Unit: 66B	1/9/2024	7/1/2024	Living Room: Screen door closer missing	project	Deferred Maintenance Plan
29603	63D Hansen Road Unit: 63D	2/12/2024	7/1/2024	Living Room: Screen door handle broken	To be done as a project	Deferred Maintenance Plan
29631	32D Dermody Road Unit: 32D	2/13/2024	7/1/2024	Living Room: Screen door closer missing	To be done as a project	Deferred Maintenance Plan
29927	300 South Street Unit: T	3/6/2024	4/18/2024	Building Common Areas Inspection: Common area kitchen multiple floor tiles broken pictures on 300t inspection	Needs abatement	Deferred Maintenance Plan
30039	108C Prospect Hill Rd Unit: 108C	3/11/2024	7/1/2024	Living Room: Screen door closer missing	To be done as a project	Deferred Maintenance Plan
30053	104A Prospect Hill Road Unit: 104A	3/12/2024	7/1/2024	Living Room: Screen door handle missing	To be done as a project	Deferred Maintenance Plan
30057	104D Prospect Hill Road Unit: 104D	3/12/2024	7/1/2024	Living Room: Screen door closer missing	To be done as a project	Deferred Maintenance Plan
30067	10F Dermody Road Unit: 10F	3/12/2024	7/1/2024	Living Room: Screen door closer missing	To be done as a project	Deferred Maintenance Plan
30492	22F Dermody Road Unit: 22F	4/11/2024	7/1/2024	Kitchen: Screen door closer missing	To be done as a project	Deferred Maintenance Plan
30494	22G Dermody Road Unit: 22G	4/11/2024	7/1/2024	Kitchen: Screen door closer missing	To be done as a project	Deferred Maintenance Plan
30506	15C Dermody Road Unit: 15C	4/11/2024	7/1/2024	Kitchen: Screen door closer missing	To be done as a project	Deferred Maintenance Plan
31962	82 Orange Street	7/16/2024	7/19/2024	Tenant reported feces in the lobby of 82 Orange St.		Other

Work Order Number	Address	Entered Date	Deferred Date	Work Order Description	Reason Deferred	Deferred Type
33126	853 Lexington Street Unit: 853	9/24/2024	10/11/2024	Living Room: Screen on door ripped	Not needed until Spring	Deferred Maintenance Plan
33176	18 Brookway Court Unit: 18	9/25/2024	10/11/2024	Living Room: Screen door closer and handle missing	Not needed until Spring	Deferred Maintenance Plan
33181	24 Brookway Court Unit: 24	9/25/2024	10/11/2024	Living Room: Screen door closer missing	Not needed until Spring	Deferred Maintenance Plan
33463	2 Chester Lane Unit: 2	10/8/2024	10/11/2024	Living Room: Both screen door closer missing	Not needed until Spring	Deferred Maintenance Plan
33467	4 Chester Lane Unit: 4	10/8/2024	10/11/2024	Living Room: Screen door closer missing	Not needed until Spring	Deferred Maintenance Plan
33479	37 Chester Lane Unit: 37	10/8/2024	10/11/2024	Kitchen: Screen door closer missing	Not needed until Spring	Deferred Maintenance Plan

## **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 WALTHAM 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 WALTHAM 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	3,428,000.00	3,813,994.00	3,745,000.00	-1.80%	604.81
3111	Shelter Rent - Tenants - Fraud/Retroactive	15,000.00	59,090.00	9,000.00	-84.80%	1.45
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	0.00	0.00	0.00	0.00%	0.00
3611	Interest on Investments - Restricted	0.00	0.00	0.00	0.00%	0.00
3690	Other Revenue	8,000.00	7,974.00	7,000.00	-12.20%	1.13
3691	Other Revenue - Retained	0.00	0.00	0.00	0.00%	0.00
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)	1,442,185.00	1,203,708.00	1,704,452.00	41.60%	275.27
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	4,893,185.00	5,084,766.00	5,465,452.00	7.50%	882.66

Consolidated Budget (400-1) for all state-aided 667 (Elderly), 200 (family), and 705 (scattered site family) developments owned by WALTHAM 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	359,376.00	341,291.00	391,500.00	14.70%	63.23
4120	Compensated Absences	0.00	919.00	0.00	-100.00%	0.00
4130	Legal	15,000.00	31,696.00	45,000.00	42.00%	7.27
4140	Members Compensation	44,800.00	47,525.00	49,600.00	4.40%	8.01
4150	Travel & Related Expenses	4,000.00	1,223.00	3,000.00	145.30%	0.48
4170	Accounting Services	16,440.00	16,440.00	16,440.00	0.00%	2.66
4171	Audit Costs	9,000.00	9,406.00	9,000.00	-4.30%	1.45
4180	Penalties & Interest	0.00	0.00	0.00	0.00%	0.00
4190	Administrative Other	114,705.00	88,732.00	116,851.00	31.70%	18.87
4191	Tenant Organization	1,700.00	931.00	1,700.00	82.60%	0.27
4100	TOTAL ADMINISTRATION	565,021.00	538,163.00	633,091.00	17.60%	102.24
4310	Water	784,800.00	833,650.00	845,880.00	1.50%	136.61
4320	Electricity	203,665.00	267,788.00	268,434.00	0.20%	43.35
4330	Gas	497,475.00	540,600.00	545,400.00	0.90%	88.08
4340	Fuel	0.00	0.00	0.00	0.00%	0.00
4360	Net Meter Utility Debit/Energy Conservation	0.00	0.00	0.00	0.00%	0.00
4390	Other	0.00	0.00	0.00	0.00%	0.00
4391	Solar Operator Costs	0.00	0.00	0.00	0.00%	0.00
4392	Net Meter Utility Credit (Negative Amount)	0.00	0.00	0.00	0.00%	0.00
4300	TOTAL UTILITIES	1,485,940.00	1,642,038.00	1,659,714.00	1.10%	268.04

Consolidated Budget (400-1) for all state-aided 667 (Elderly), 200 (family), and 705 (scattered site family) developments owned by WALTHAM HOUSING AUTHORITY						
<b>EXPENSES</b>						
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	850,871.00	882,716.00	893,252.00	1.20%	144.26
4420	Materials & Supplies	242,000.00	223,038.00	244,528.00	9.60%	39.49
4430	Contract Costs	315,401.00	419,151.00	314,038.00	-25.10%	50.72
4510	Insurance	221,910.00	218,006.00	242,873.00	11.40%	39.22
4520	Payment in Lieu of Taxes	14,844.00	14,843.00	14,844.00	0.00%	2.40
4540	Employee Benefits	665,902.00	446,798.00	686,162.00	53.60%	110.81
4541	Employee Benefits - GASB 45	0.00	0.00	0.00	0.00%	0.00
4542	Pension Expense - GASB 68	0.00	-96,253.00	0.00	-100.00%	0.00
4570	Collection Loss	10,000.00	151,279.00	10,000.00	-93.40%	1.61
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	0.00	0.00	0.00	0.00%	0.00
4500	TOTAL GENERAL EXPENSES	912,656.00	734,673.00	953,879.00	29.80%	154.05
4610	Extraordinary Maintenance	282,500.00	486,573.00	406,100.00	-16.50%	65.58
4611	Equipment Purchases - Non Capitalized	11,550.00	1,926.00	11,550.00	499.70%	1.87
4612	Restricted Reserve Expenditures	0.00	0.00	0.00	0.00%	0.00
4715	Housing Assistance Payments	0.00	0.00	0.00	0.00%	0.00
4801	Depreciation Expense	0.00	682,707.00	0.00	-100.00%	0.00
4600	TOTAL OTHER EXPENSES	294,050.00	1,171,206.00	417,650.00	-64.30%	67.45
4000	TOTAL EXPENSES	4,665,939.00	5,610,985.00	5,116,152.00	-8.80%	826.25

Consolidated Budget (400-1) for all state-aided 667 (Elderly), 200 (family), and 705 (scattered site family) developments owned by WALTHAM HOUSING AUTHORITY						
<b>SUMMARY</b>						
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	4,893,185.00	5,084,766.00	5,465,452.00	7.50%	882.66
4000	TOTAL EXPENSES	4,665,939.00	5,610,985.00	5,116,152.00	-8.80%	826.25
2700	NET INCOME (DEFICIT)	227,246.00	-526,219.00	349,300.00	-166.40%	56.41
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	227,246.00	-526,219.00	349,300.00	-166.40%	56.41

## **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 property 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**

PMRs are conducted for most LHAs on a biennial basis. This year there is no PMR record for this Housing Authority.



**Explanation of PMR Criteria Ratings**

CRITERION	DESCRIPTION
<b>Management</b>	
Occupancy Rate	<p>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))</p> <ul style="list-style-type: none"> <li>• “No Findings” : Occupancy Rate is at or above 98%</li> <li>• Operational Guidance: Occupancy rate is at 95% up to 97.9%</li> <li>• Corrective Action: Adjusted occupancy rate is less than 95%</li> </ul>
Tenant Accounts Receivable (TAR)	<p>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)</p> <ul style="list-style-type: none"> <li>• “No Findings” : At or below 2%</li> <li>• “Operational Guidance”: More than 2% , but less than 5%</li> <li>• “Corrective Action”: 5% or more</li> </ul>
Certifications and Reporting Submissions	<p>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.</p> <ul style="list-style-type: none"> <li>• “No Findings”: At least 11 of the required 12 reports were submitted and at least 9 were submitted on time.</li> <li>• “Operational Guidance”: Less than 11 of the required 12 reports were submitted and/or less than 9 were submitted on time.</li> </ul>
Board Member Training	<p>Percentage of board members that have completed the mandatory online board member training.</p> <ul style="list-style-type: none"> <li>• “No Findings” : 80% or more completed training</li> <li>• “Operational Guidance” : 60-79.9% completed training</li> <li>• “Corrective Action” : &lt;60 % completed training</li> </ul>
Staff Certifications and Training	<p>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.</p> <ul style="list-style-type: none"> <li>• No Findings: LHAs completed the required number of trainings</li> <li>• Corrective Action: LHAs have not completed any trainings</li> </ul>
Annual Plan (AP) Submitted	<p>Housing authorities are required to submit an annual plan every year.</p> <ul style="list-style-type: none"> <li>• “No Findings” =Submitted on time</li> <li>• “Operational Guidance” =Up to 45 days late</li> <li>• “Corrective Action” =More than 45 days late</li> </ul>

CRITERION	DESCRIPTION
<b>CHAMP</b>	
Paper applications	<p>Paper applications are available, received and entered into CHAMP</p> <ul style="list-style-type: none"> <li>• 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</li> <li>• 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</li> <li>• 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</li> </ul>
Vacancies occupied using CHAMP	<p>Vacancies are recorded correctly and occupied using CHAMP</p> <ul style="list-style-type: none"> <li>• 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</li> <li>• 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</li> <li>• 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</li> </ul>

CRITERION	DESCRIPTION
<b>Financial</b>	
Adjusted Net Income	<p>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.</p> <p>Underspending Rating:</p> <ul style="list-style-type: none"> <li>• "No Findings" : 0 to 9.9%</li> <li>• "Operational Guidance": 10 to 14.9%</li> <li>• "Corrective Action": 15% or higher</li> </ul> <p>Overspending Rating:</p> <ul style="list-style-type: none"> <li>• "No Findings" : 0 to -4.9%</li> <li>• "Operational Guidance": -5% to -9.9%</li> <li>• "Corrective Action": -10% or below</li> </ul>
Operating Reserves	<p>Current Operating Reserve as a percentage of total maximum reserve level. Appropriate reserve level is buffer against any unforeseen events or expenditures.</p> <ul style="list-style-type: none"> <li>• "No Findings" :35%+ of maximum operating reserve</li> <li>• "Operational Guidance": 20% to 34.9% of maximum operating reserve</li> <li>• "Corrective Action": &lt;20% of maximum operating reserve</li> </ul>
<b>Capital Planning</b>	
Capital Spending	<p>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</p> <ul style="list-style-type: none"> <li>• "No Findings" = at least 80%</li> <li>• "Operational Guidance" = At least 50%</li> <li>• "Corrective Action" = Less than 50%</li> </ul>
<b>Health &amp; Safety</b>	
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
<b>Facility Management – Inspection Standards and Practices</b>	
100% Unit Inspections	<p>All units inspected at LHA during FY under review</p> <ul style="list-style-type: none"> <li>No Findings: 100% of units inspected</li> <li>Corrective Action: Less than 100% of units inspected</li> </ul>
LHA Inspections Reports/Work Orders	<p>Unit inspection reports create, track, and report work orders for inspection repairs, and inspection WOs completed within 30 days or add to DM/CIP</p> <ul style="list-style-type: none"> <li>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</li> <li>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</li> <li>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)</li> </ul>
Accuracy of LHA Inspections	<p>Unit inspection reports accurately reflect necessary repairs</p> <ul style="list-style-type: none"> <li>No Findings: c.667 unit has less than 2 EHS deficiencies and c.200/705 unit has less than 3 EHS deficiencies</li> <li>Operational Guidance: c.667 unit has 2 EHS deficiencies or c.200/705 has 3 EHS deficiencies</li> <li>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</li> </ul>
<b>Facility Management – Preventative Maintenance Standards and Practices</b>	
LHA Preventative Maintenance Schedule Accuracy and Implementation of Preventative Schedules	<p>LHA preventative maintenance schedule accurately reflects all necessary work to maximize the life of LHA components</p> <ul style="list-style-type: none"> <li>No Findings: c.667 unit less than 2 EHS deficiencies and c.200/705 less than 3 EHS deficiencies</li> <li>Operational Guidance: c.667 2 EHS deficiencies or c.200/705 3 EHS deficiencies</li> <li>Corrective Action: c.667 equal to or greater than 3 EHS deficiencies or c.200/705 equal to or greater than 4 EHS deficiencies</li> </ul>

CRITERION	DESCRIPTION
<b>Facility Management – Vacancy Turnover Standards and Practices</b>	
Vacancy Turnover Work Orders	<p>Work orders created for every vacancy and completed within 30 days (or waiver requested)</p> <ul style="list-style-type: none"> <li>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 &lt;=30 days for c.667 units or &lt;=45 days for c.200/705 units or have approved waiver</li> <li>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</li> <li>Corrective Action: Vacancy work orders are not created, tracked and reported for every unit; Or vacancy work orders are Maintenance Ready in &gt;45 days for c.667 and &gt;60 days for c.200/705 and have no approved waiver</li> </ul>
Accuracy and Standard of Vacancy Turnovers	<p>Vacancy turnover work orders accurately reflect necessary repairs</p> <ul style="list-style-type: none"> <li>No Findings: c.667 unit less than 2 EHS deficiencies and c.200/705 less than 3 EHS deficiencies</li> <li>Operational Guidance: c.667 2 EHS deficiencies or c.200/705 3 EHS deficiencies</li> <li>Corrective Action: c.667 equal to or greater than 3 EHS deficiencies or c.200/705 equal to or greater than 4 EHS deficiencies</li> </ul>
<b>Work Order Types and Systems</b>	
Emergency Work Orders	<p>All emergency work orders are created, tracked, reported and completed within 48 hours</p> <ul style="list-style-type: none"> <li>No Findings: All emergency work orders under review are created, tracked, reported and completed within 48 hours</li> <li>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</li> <li>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</li> </ul>
CRITERION	DESCRIPTION
Requested Work Orders	<p>All requested work orders are created, tracked, reported and completed within 14 days or added to DM/CIP</p> <ul style="list-style-type: none"> <li>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</li> <li>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</li> <li>Corrective Action: Not all requested work orders are completed within 14 days or added to DM/CIP</li> </ul>

## **Policies**

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

<b>Policy</b>	<b>Last Ratified by Board Vote</b>	<b>Notes</b>
*Capitalization Policy	6/9/2020	
*Fair Housing Marketing Plan	9/13/2022	
*Grievance Policy	6/9/2020	
*Language Access Plan	9/13/2022	
*Personnel Policy	6/9/2020	
*Procurement Policy	6/9/2020	
*Reasonable Accommodations Policy	4/12/2022	
*Rent Collection Policy	6/9/2020	
Other – Define in the ‘Notes’ column	8/4/2020	ACOP - Admissions and Continuing Occupancy Policy
Other – Define in the ‘Notes’ column	4/12/2022	VAWA - Violence against women act
Other – Define in the ‘Notes’ column	4/12/2022	CORI Policy
Parking	6/9/2020	
Pet Policy	6/9/2020	
Sexual Harassment Policy	6/9/2020	
Smoking Policy	6/9/2020	

\* 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**

WALTHAM 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
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\*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 to 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
- . Waltham\_Fall2024\_survey\_COMBO
- . Waltham\_Fall2024\_comparison\_667
- . Waltham\_Fall2024\_comparison\_200.705
- . Cover sheet for tenant satisfaction surveys
- . Public Comments
- . Waltham LTO Letters

*Waltham Housing Authority*  
110 POND STREET  
WALTHAM, MASSACHUSETTS 02451-4505

KELLY DURKEE-ERWIN  
SCOTT HOVSEPIAN  
PATRICIA MCGRATH  
ROBERT LEBLANC

TEL: (781) 894-3357  
FAX: (781) 894-7595  
TDD: (781) 894-3357

JOHN F. GOLLINGER  
Executive Director


May 28, 2025

LTO Local Tenant Organizations

Dear Tenant President,

Please find attached a copy of the Waltham Housing Authority's Capital Improvement Plan for the fiscal year 2026. The plan outlines the WHA's proposed Capital Improvement Projects for the next 5 years. Please review the plan with the tenants in your development. Please feel free to make comments or suggestions as well. The Department of Housing Communities and Development requires you as the President to sign off on the plan.

I the Tenant President (your name) Isabel Small from (Chesterbrook apartments (200-2) have reviewed the plan and will share it with other tenants from my development.

(Sign here) X 

Thank you,

Mark A. Johnson

MMS, CSL-Unrestricted  
PHM  
Assistant Executive Director  
Waltham Housing Authority

Office 781-894-3357 x 267  
Cell 781-844-1199

*Waltham Housing Authority*  
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JOHN F. GOLLINGER  
Executive Director

May 23, 2025

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Dear Tenant President,

Please find attached a copy of the Waltham Housing Authority's Capital Improvement Plan for the fiscal year 2025. The plan outlines WHA's proposed Capital Improvement Projects for the next 5 years. Please review the plan with the tenants in your development. Please feel free to make comments or suggestions as well. The Department of Housing Communities and Development requires you as the President to sign off on the plan.

I the Tenant President (your name) Leslie Gore from (Orange 667-4) apartments **have** reviewed the plan and will share it with other tenants from my development.

(Sign here) X  5-28-2025

Thank you,

Mark A. Johnson

MMS, CSL-Unrestricted  
MPHA  
Assistant Executive Director  
Waltham Housing Authority

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I the Tenant President (your name) Heather Richards from (Prospect Terrace) apartments (200-1) have reviewed the plan and will share it with other tenants from my development.

(Sign here) X  5-28-2025

Thank you,

Mark A. Johnson

MMS, CSL-Unrestricted  
PHM  
Assistant Executive Director  
Waltham Housing Authority

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JOHN F. GOLLINGER  
Executive Director

May 23, 2025

LTO Local Tenant Organizations

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I the Tenant President (your name) Heather Richards from (Prospect Terrace) apartments (200-1) have reviewed the plan and will share it with other tenants from my development.

(Sign here) X  5-28-2025

Thank you,

Mark A. Johnson

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PHM  
Assistant Executive Director  
Waltham Housing Authority

Office 781-894-3357 x 267  
Cell 781-844-1199

**Waltham Housing Authority**  
**Annual Plan Hearing**

---

We had our Annual Plan Hearing on July 8<sup>th</sup>, 2025. There were no Public Comments at that time.

Mark Johnson  
Assistant Executive Director



## **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.



Resident Survey  
**WALTHAM HOUSING AUTHORITY**  
Chapter 200 & Chapter 705 Family Housing  
Fall 2024

The Massachusetts Executive Office of Housing and Livable Communities is working with the Center for Survey Research at the University of Massachusetts Boston to survey residents in the housing units it oversees.

**Fall of 2023:**

- Surveys were sent to 2,075 family housing units (Chapter 200 and 705) across the Commonwealth. 332 surveys were filled out and returned.

**Fall 2024:**

- Surveys were sent to 3,421 family housing units (Chapter 200 and 705). 615 surveys were filled out and returned.
- In the **Waltham Housing Authority**, surveys were sent to a total of **295** Waltham housing units (Chapter 200 and 705); **56** surveys were completed and returned.

This report provides some information about how the residents from the **Waltham Housing Authority** who answered the survey responded. It compares their answers to those from residents in the entire state and to those from large LHAs in Metro Boston. These large LHAs in Metro Boston include: Arlington, Boston, Chelsea, Everett, Quincy, Revere, Somerville, Waltham, and Watertown. (Please note that survey data may not have been received from each one of these LHAs.)

## Communication

- **Communication with management:** Residents were asked about how they interacted with their Housing Authorities in the last 12 months. The table below shows what percentage of residents said they did each of the following:

	Waltham Housing Authority	Large LHAs in Metro Boston*	Entire State
Felt they were usually or always treated with courtesy and respect when they contacted management.....	82%	70%	72%
Knew the Executive Director held a meeting with residents.....	0%	17%	18%

\* Large LHAs in Metro Boston include: : Arlington, Boston, Chelsea, Everett, Quincy, Revere, Somerville, Waltham, and Watertown. (Please note that survey data may not have been received from each one of these LHAs.)

- **Communication with maintenance staff:** Residents were specifically asked about their interactions with the Waltham Housing Authority maintenance staff in the last 12 months.

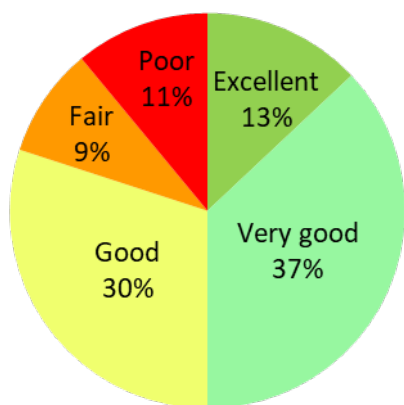
	Waltham Housing Authority	Large LHAs in Metro Boston	Entire State
Felt they were treated with courtesy and respect when they contacted maintenance.....	86%	73%	77%
Were contacted by the Housing Authority before entering their apartment.....	96%	86%	85%

## Maintenance and Repair

- **Overall maintenance:** Respondents were asked how they would rate overall building maintenance (such as clean halls and stairways and having lights and elevators that work) and outdoor space maintenance (such as litter removal and clear walkways) in the last 12 months.

### Building maintenance:

**Waltham Housing Authority**



**Large LHAs in Metro Boston**



**Entire State**



### Outdoor maintenance:

**Waltham Housing Authority**



**Large LHAs in Metro Boston**



**Entire State**



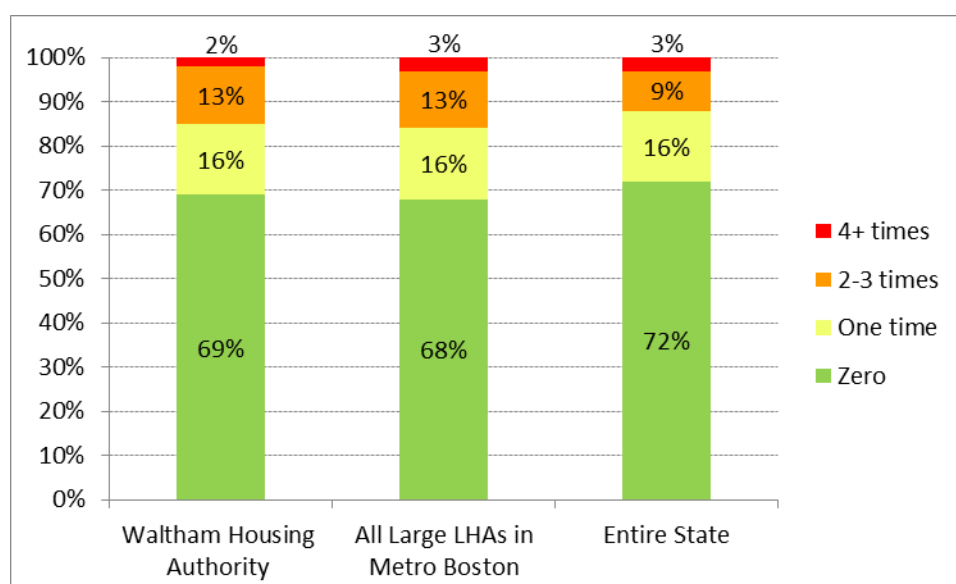
- **Heating and Water Problems:** About one-half of respondents had a problem with their heating and about one-half had a plumbing problem in the last 12 months.

	Waltham Housing Authority	Large LHAs in Metro Boston	Entire State
Had any heating problem.....	59%	55%	59%
Had any water problem.....	55%	73%	76%

- **Heating Problems**

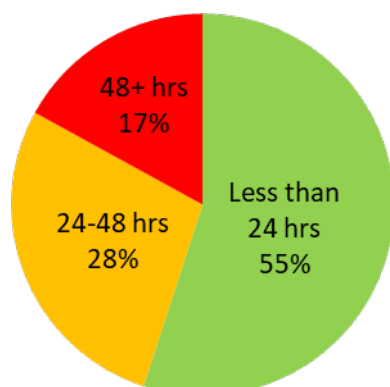
**How many times did residents completely lose heat?**

The chart below shows how many times respondents completely lost heat in the last 12 months. The green part of the bar shows the percentage of residents who did not lose heat at all. The yellow part shows who lost heat once. The orange shows those who lost heat 2 or 3 times. And the red shows those who lost heat 4 or more times in the last 12 months.

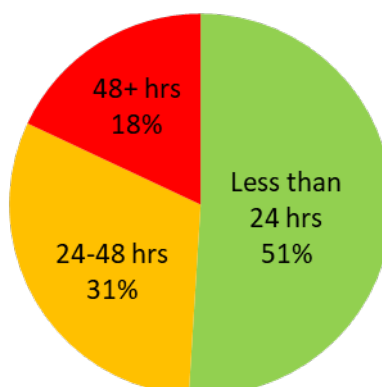


**How long did it usually take for heat to come back on?** For those respondents who reported completely losing heat, we asked how long it usually took for the heat to come back on – less than 24 hours, 24 - 48 hours, or more than 48 hours.

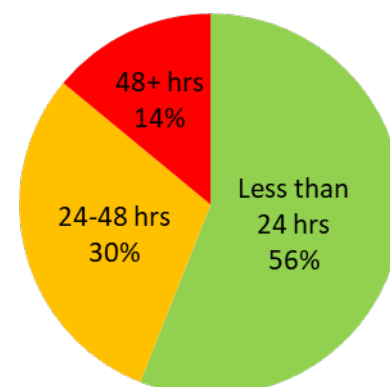
**Waltham Housing Authority**



**Large LHAs in Metro Boston**



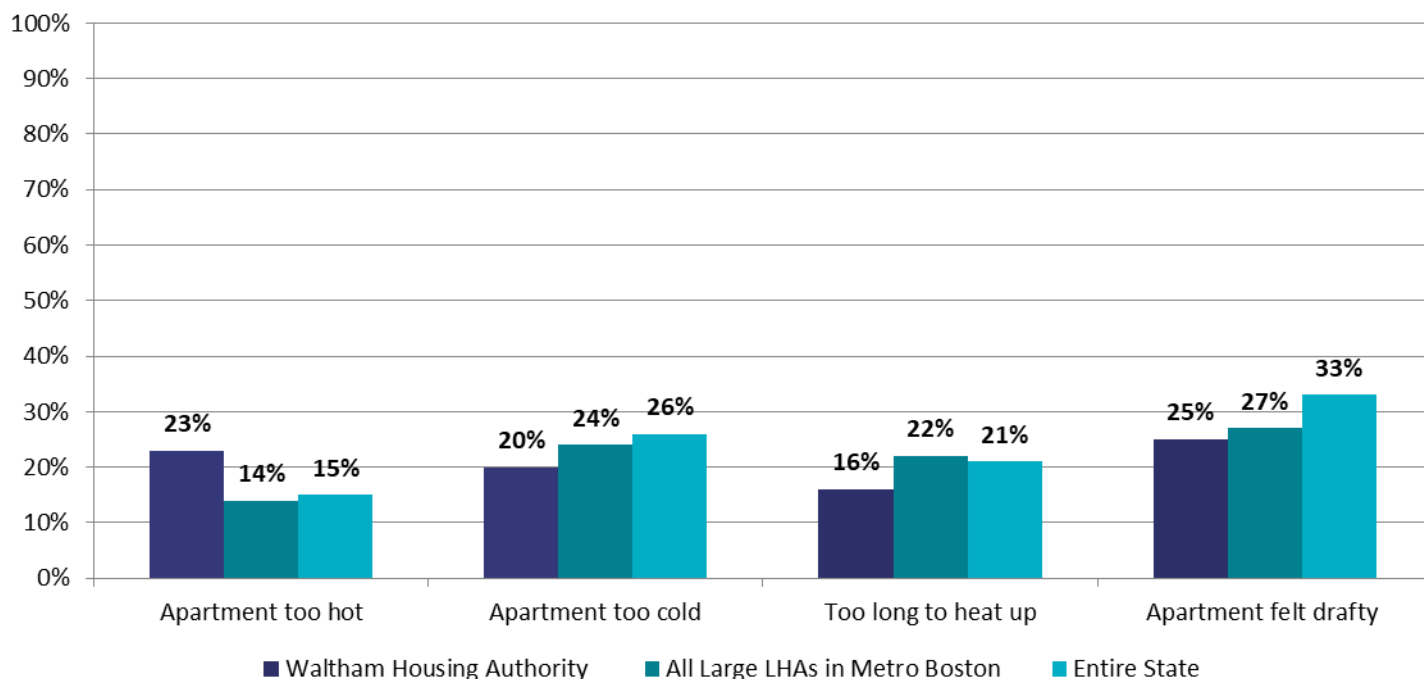
**Entire State**



- **Other Heating Problems**

**In the last 12 months, did residents have other heating problems?**

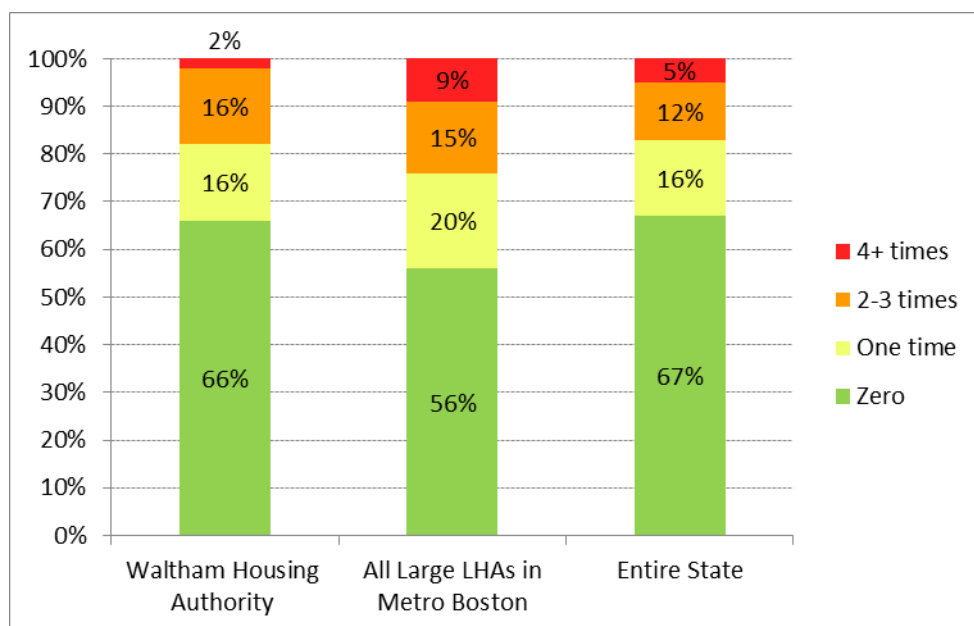
The chart below shows what percentage of residents experienced other heating problems in the last 12 months.



- **Water or Plumbing Problems**

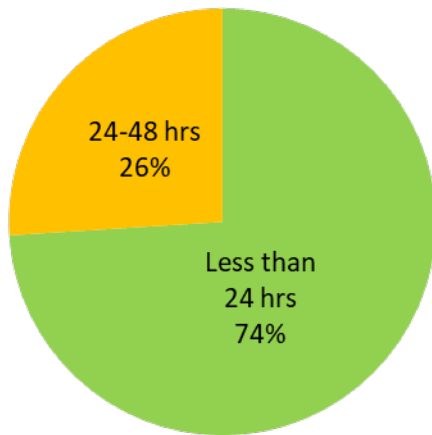
**How many times did residents not have hot water in their apartment?**

The chart below shows how many times respondents did not have any hot water in their apartment in the last 12 months. The green part of the bar shows what percentage of residents never lost hot water. The yellow part shows who lost hot water once. The orange shows those who lost hot water 2 or 3 times. And the red shows those who had no hot water in their apartment 4 or more times in the last 12 months.

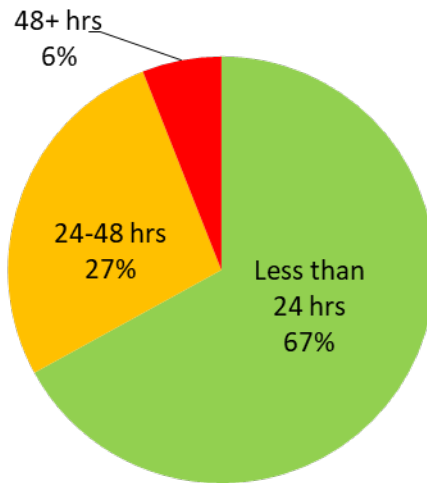


**How long did it usually take for hot water to come back on?** For those respondents who reported not having hot water in their apartment, we asked how long it usually took for the hot water to come back on – less than 24 hours, 24 - 48 hours, or more than 48 hours.

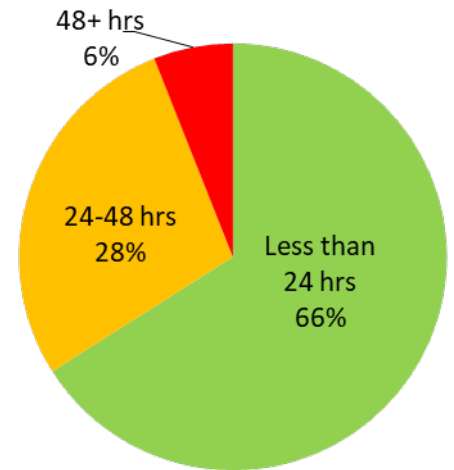
**Waltham  
Housing Authority**



**Large LHAs in  
Metro Boston**



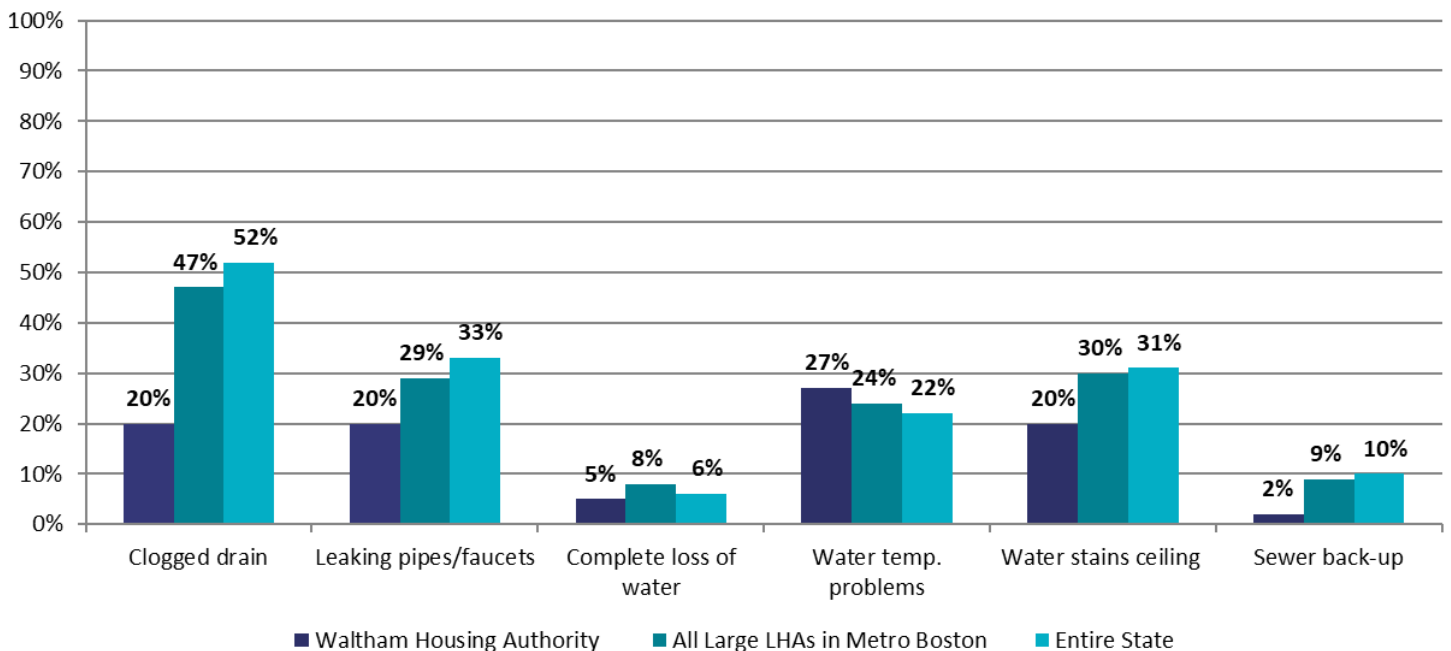
**Entire State**



- Other Water or Plumbing Problems**

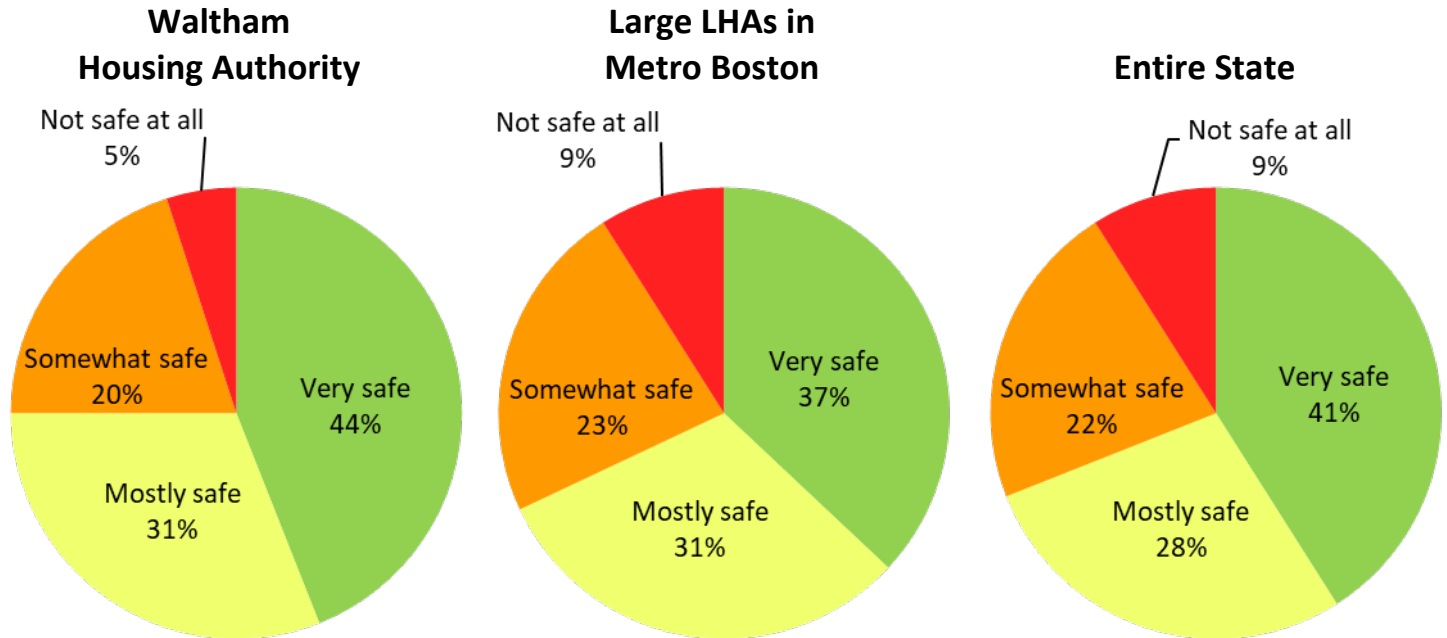
**In the last 12 months, did residents have other water or plumbing problems?**

The chart below shows what percentage of respondents had other water or plumbing problems in the last 12 months.

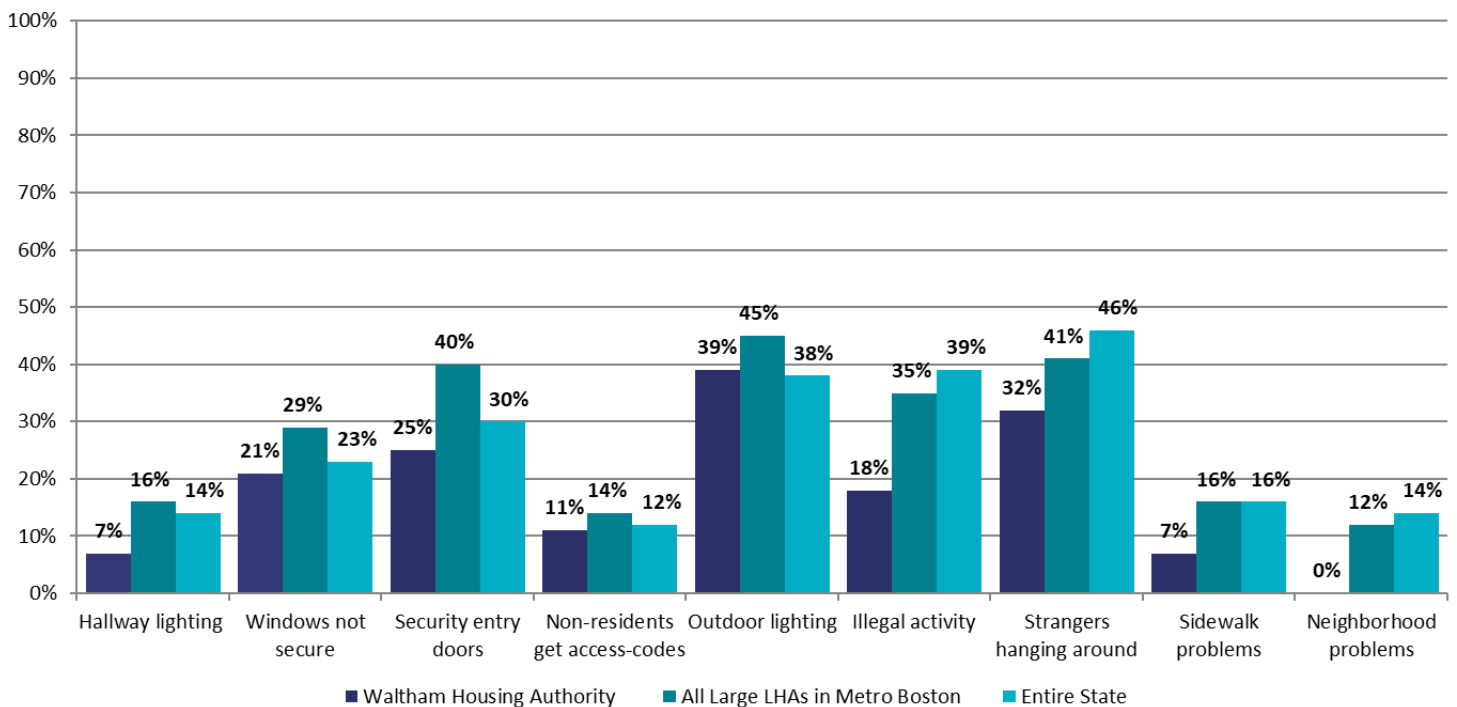


## Safety

- **Respondents were asked how safe they felt in their development.** The charts below show what percentage of residents said they felt very safe, mostly safe, somewhat safe, or not safe at all in their development in the last 12 months.



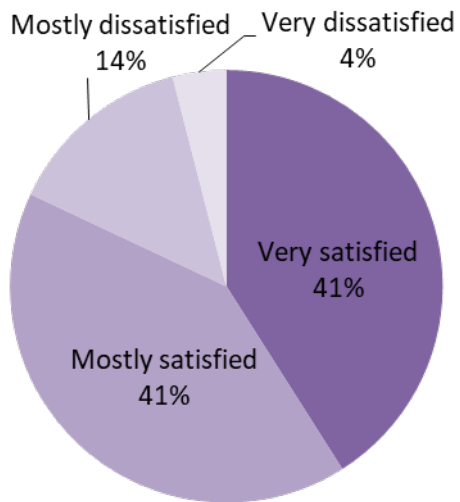
**Reasons why respondents felt unsafe in their development:** Respondents were asked why they felt unsafe in their development. This chart shows what specific concerns respondents mentioned.



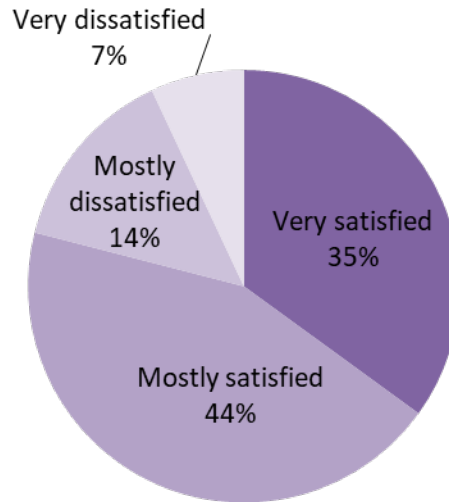
## Overall Satisfaction

- **Respondents were asked about their overall satisfaction living in their development.** The chart below shows what percentage of people said they were very satisfied, mostly satisfied, mostly dissatisfied, or very dissatisfied.

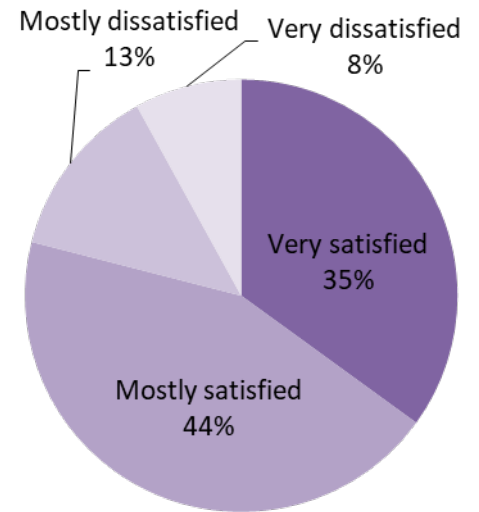
**Waltham  
Housing Authority**



**Large LHAs in  
Metro Boston**



**Entire State**





## 2020 & 2024 Comparison

Residents of the Waltham Housing Authority were also surveyed in the fall of 2020.

### Fall of 2020:

- Surveys were sent to **247** Waltham housing units (Chapter 200 & 705). **44** surveys were filled out and returned.

### Fall 2024:

- Surveys were sent to **295** Waltham housing units (Chapter 200 & 705). **56** surveys were filled out and returned.

The next section of the report will show how the responses from 2020 compare to the responses from 2024.

## Communication Comparison

- **Communication with management:** Residents were asked about how they interacted with their Housing Authorities in the last 12 months.

	Fall 2020	Fall 2024
Felt they were usually or always treated with courtesy and respect when they contacted management.....	68%	82%
Knew the Executive Director held a meeting with residents.....	5%	0%

- **Communication with maintenance staff:** Residents were specifically asked about their interactions with the Waltham Housing Authority maintenance staff in the last 12 months.

	Fall 2020	Fall 2024
Felt they were treated with courtesy and respect when they contacted maintenance .....	75%	86%
Were contacted by the Housing Authority before entering their apartment .....	95%	96%

## Maintenance and Repair Comparison

### Overall maintenance:

Respondents were asked how they would rate overall building maintenance (*such as clean halls and stairways and having lights and elevators that work*) and outdoor space maintenance (*such as litter removal and clear walkways*) in the last 12 months.

### Building maintenance:

**Fall  
2020**



**Fall  
2024**



### Outdoor maintenance:

**Fall  
2020**



**Fall  
2024**



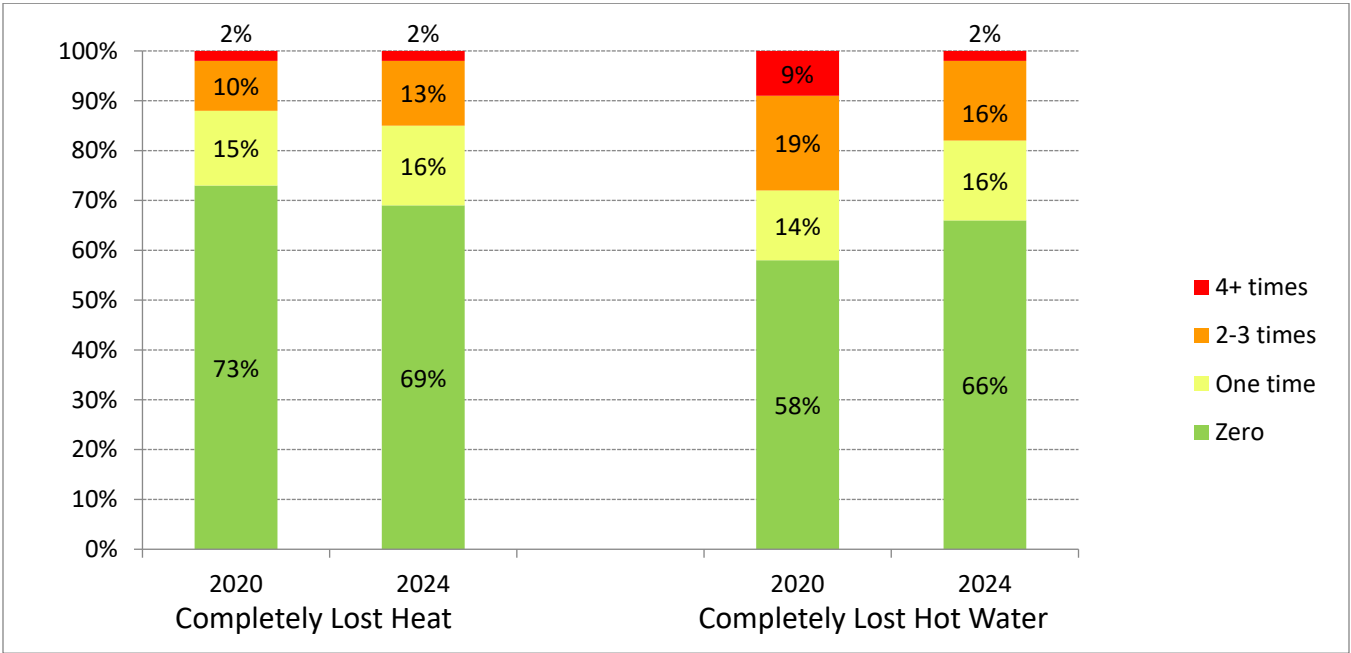
Heating & Plumbing Problems:

- Percent of residents who had any kind of heating or plumbing problems in the last 12 months:

	Fall 2020	Fall 2024
Had any heating problem.....	55%	59%
Had any problem with water or plumbing.....	75%	55%

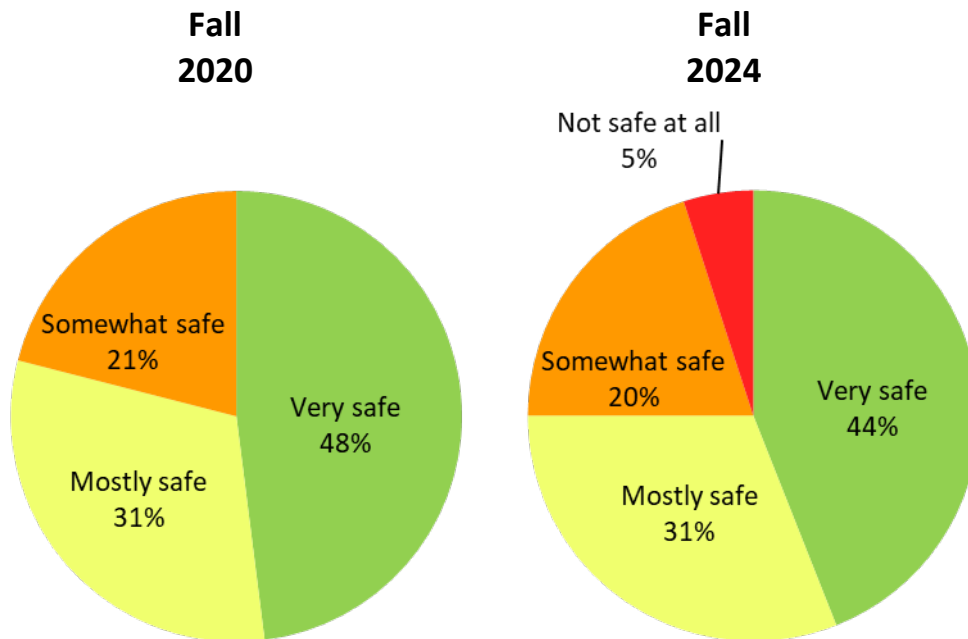
- How many times did residents completely lose heat or hot water in the last 12 months?

The chart below shows how many times respondents completely lost heat in the last 12 months and how many times respondents completely lost hot water in the last 12 months.



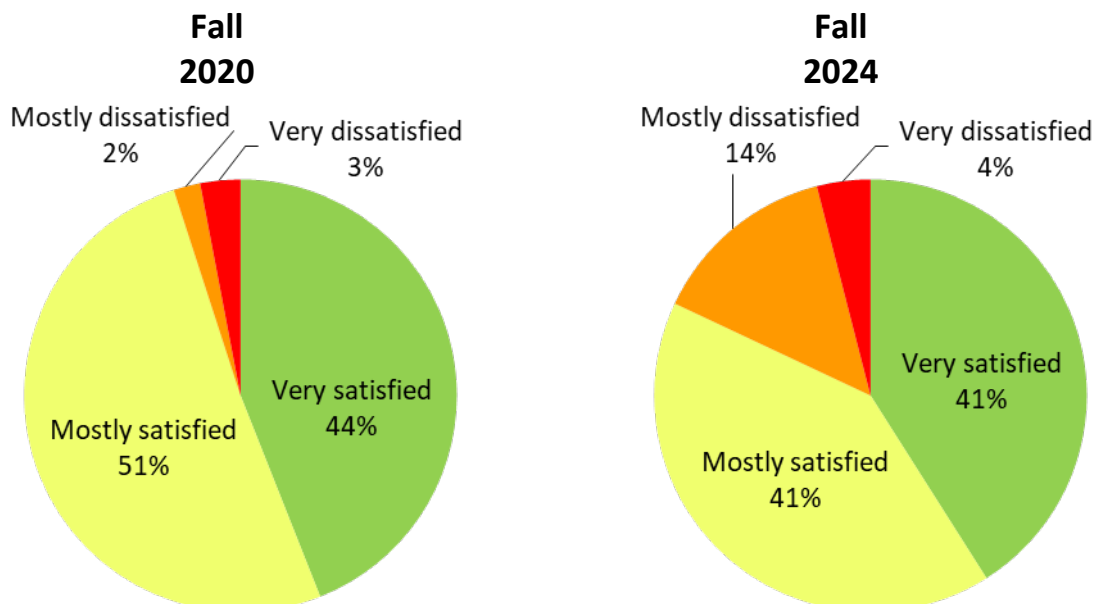
## Safety Comparison

- **Respondents were asked how safe they felt in their development.** The charts below shows how safe they felt in general in their development in the last 12 months.



## Overall Satisfaction Comparison

- **Respondents were asked about their overall satisfaction living in their development.** The chart below shows their level of satisfaction.





Resident Survey  
**WALTHAM HOUSING AUTHORITY**  
Chapter 667 Housing  
Fall 2024

The Massachusetts Executive Office of Housing and Livable Communities is working with the Center for Survey Research at the University of Massachusetts Boston to survey residents in the housing units it oversees.

**Fall of 2023:**

- Surveys were sent to 6,746 family housing units (Chapter 667) across the Commonwealth. 2,968 surveys were filled out and returned.

**Fall 2024:**

- Surveys were sent to 5,721 family housing units (Chapter 667). 2,538 surveys were filled out and returned.
- In the **Waltham Housing Authority**, surveys were sent to a total of **206** Waltham housing units (Chapter 667); **91** surveys were completed and returned.

This report provides some information about how the residents from the **Waltham Housing Authority** who answered the survey responded. It compares their answers to those from residents in the entire state and to those from large LHAs in Metro Boston. These large LHAs in Metro Boston include: Arlington, Boston, Chelsea, Everett, Quincy, Revere, Somerville, Waltham, and Watertown. (Please note that survey data may not have been received from each one of these LHAs.)

## Communication

- **Communication with management:** Residents were asked about how they interacted with their Housing Authorities in the last 12 months. The table below shows what percentage of residents said they did each of the following:

	Waltham Housing Authority	Large LHAs in Metro Boston*	Entire State
Felt they were usually or always treated with courtesy and respect when they contacted management.....	79%	81%	83%
Knew the Executive Director held a meeting with residents.....	12%	38%	41%

\* Large LHAs in Metro Boston include: Arlington, Boston, Chelsea, Everett, Quincy, Revere, Somerville, Waltham, and Watertown. (Please note that survey data may not have been received from each one of these LHAs.)

- **Communication with maintenance staff:** Residents were specifically asked about their interactions with the Waltham Housing Authority maintenance staff in the last 12 months.

	Waltham Housing Authority	Large LHAs in Metro Boston	Entire State
Felt they were treated with courtesy and respect when they contacted maintenance.....	85%	83%	88%
Were contacted by the Housing Authority before entering their apartment.....	95%	90%	91%

## Maintenance and Repair

- **Overall maintenance:** Respondents were asked how they would rate overall building maintenance (such as clean halls and stairways and having lights and elevators that work) and outdoor space maintenance (such as litter removal and clear walkways) in the last 12 months.

### Building maintenance:

**Waltham Housing Authority**



**Large LHAs in Metro Boston**



**Entire State**



### Outdoor maintenance:

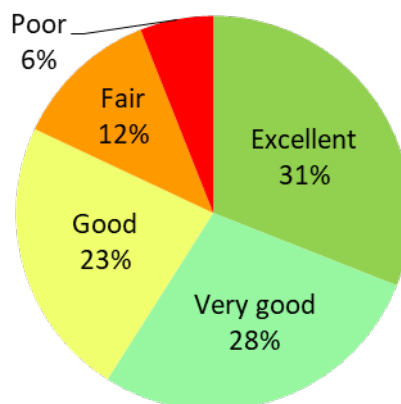
**Waltham Housing Authority**



**Large LHAs in Metro Boston**



**Entire State**



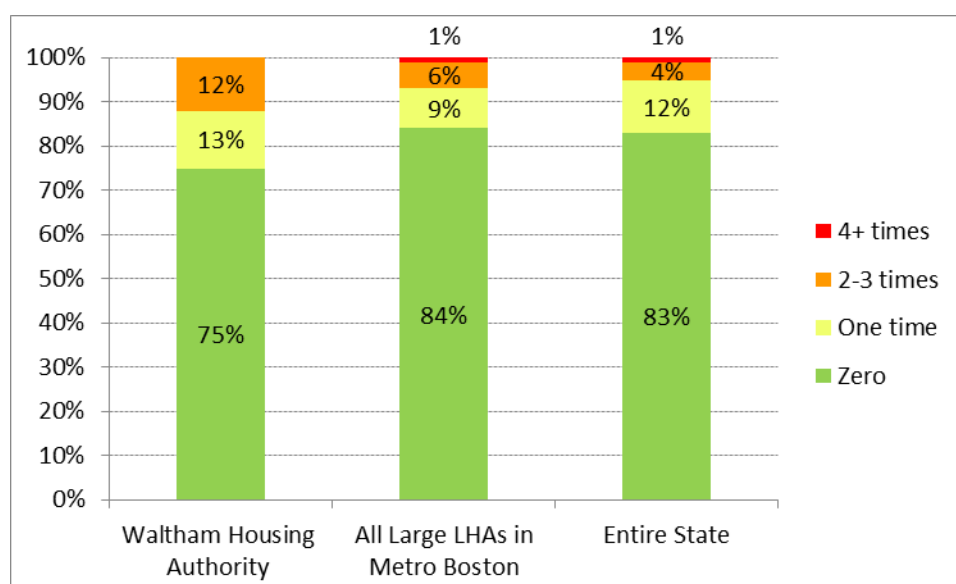
- **Heating and Water Problems:** About one-half of respondents had a problem with their heating and about one-half had a plumbing problem in the last 12 months.

	Waltham Housing Authority	Large LHAs in Metro Boston	Entire State
Had any heating problem.....	45%	34%	33%
Had any water problem.....	57%	61%	57%

- **Heating Problems**

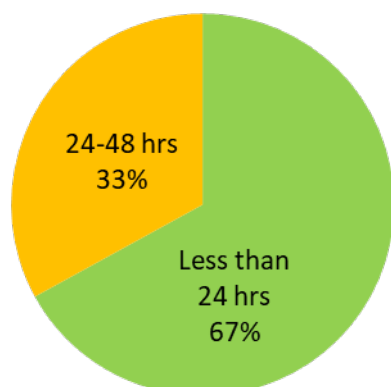
### How many times did residents completely lose heat?

The chart below shows how many times respondents completely lost heat in the last 12 months. The green part of the bar shows the percentage of residents who did not lose heat at all. The yellow part shows who lost heat once. The orange shows those who lost heat 2 or 3 times. And the red shows those who lost heat 4 or more times in the last 12 months.

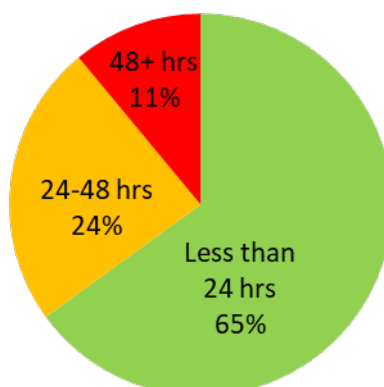


**How long did it usually take for heat to come back on?** For those respondents who reported completely losing heat, we asked how long it usually took for the heat to come back on – less than 24 hours, 24 - 48 hours, or more than 48 hours.

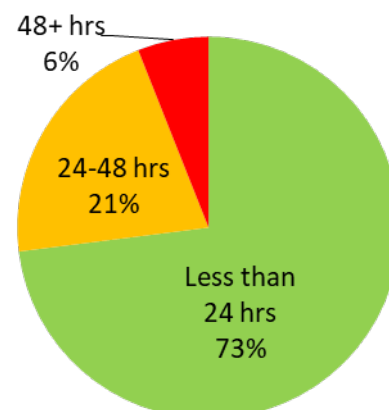
**Waltham Housing Authority**



**Large LHAs in Metro Boston**



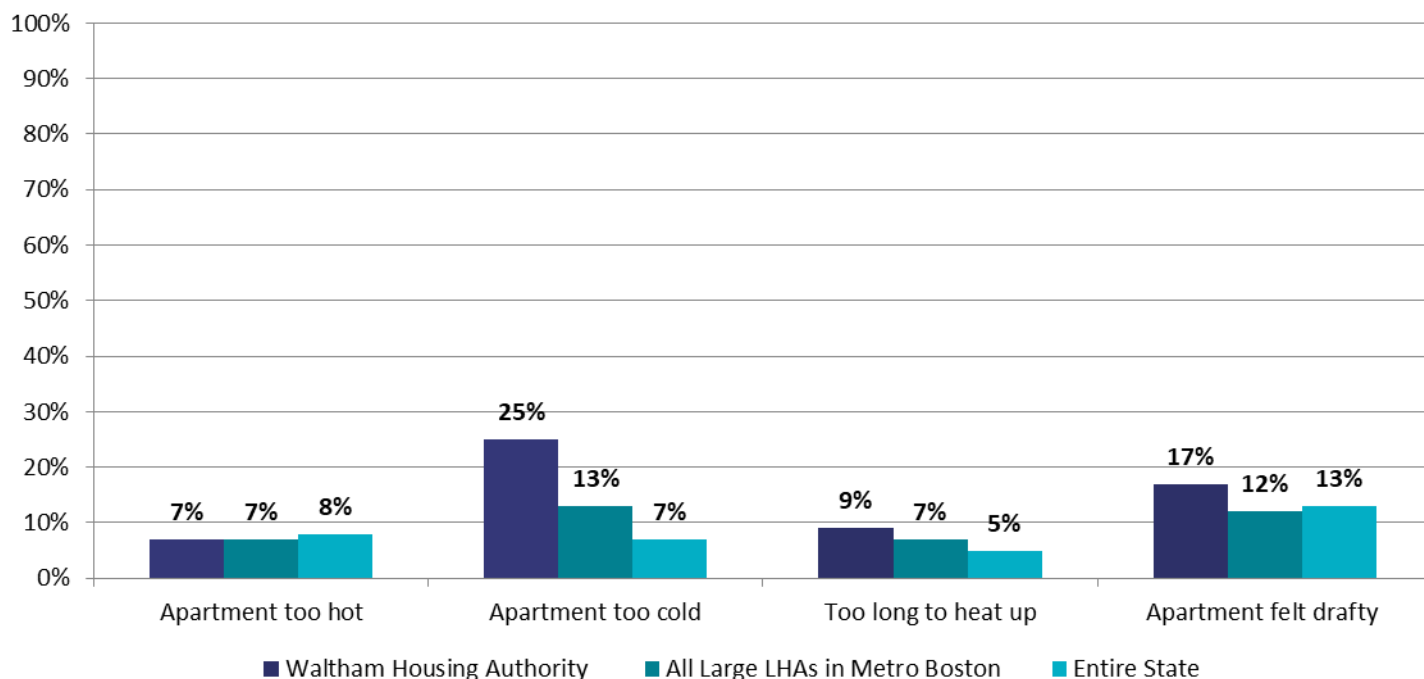
**Entire State**



- Other Heating Problems

**In the last 12 months, did residents have other heating problems?**

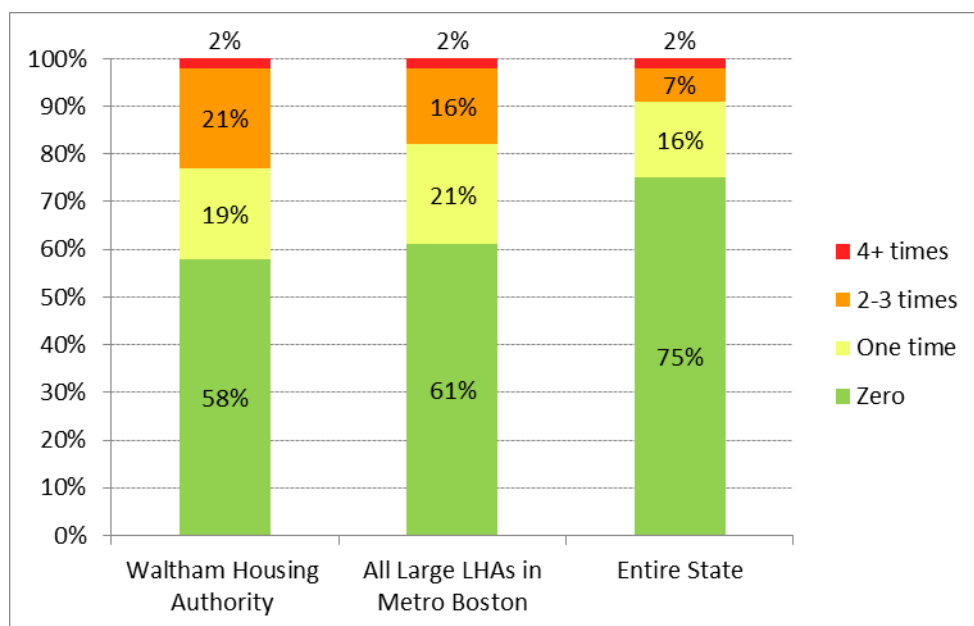
The chart below shows what percentage of residents experienced other heating problems in the last 12 months.



- Water or Plumbing Problems

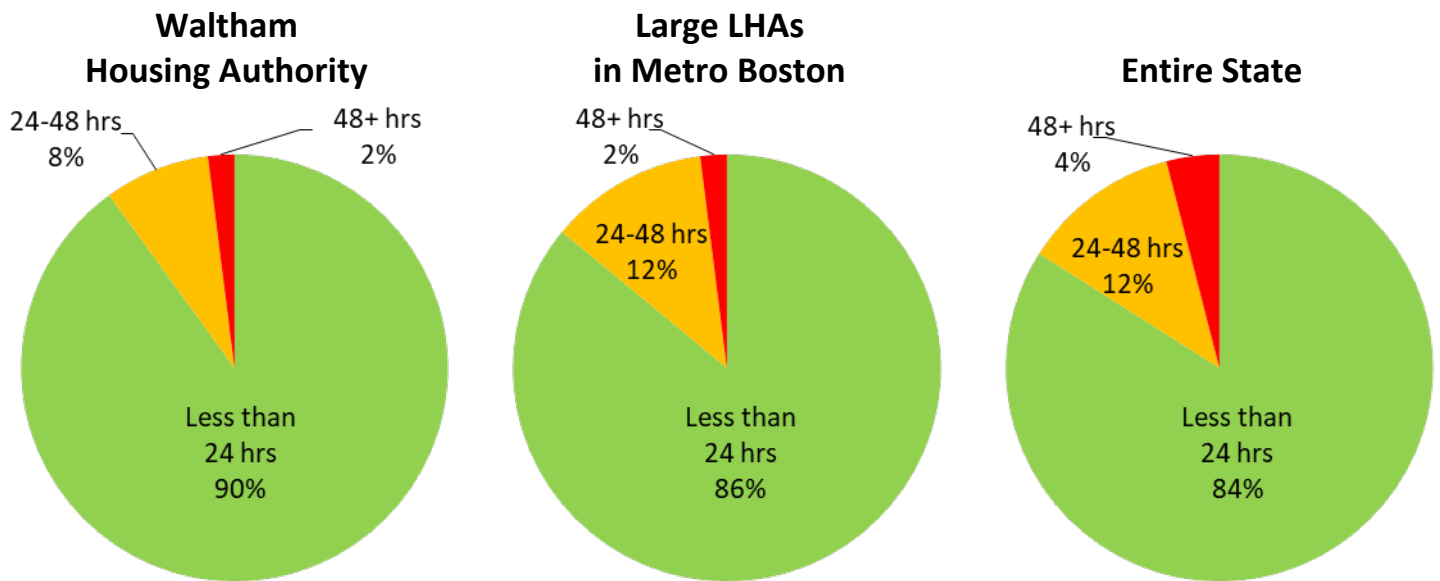
**How many times did residents not have hot water in their apartment?**

The chart below shows how many times respondents did not have any hot water in their apartment in the last 12 months. The green part of the bar shows what percentage of residents never lost hot water. The yellow part shows who lost hot water once. The orange shows those who lost hot water 2 or 3 times. And the red shows those who had no hot water in their apartment 4 or more times in the last 12 months.





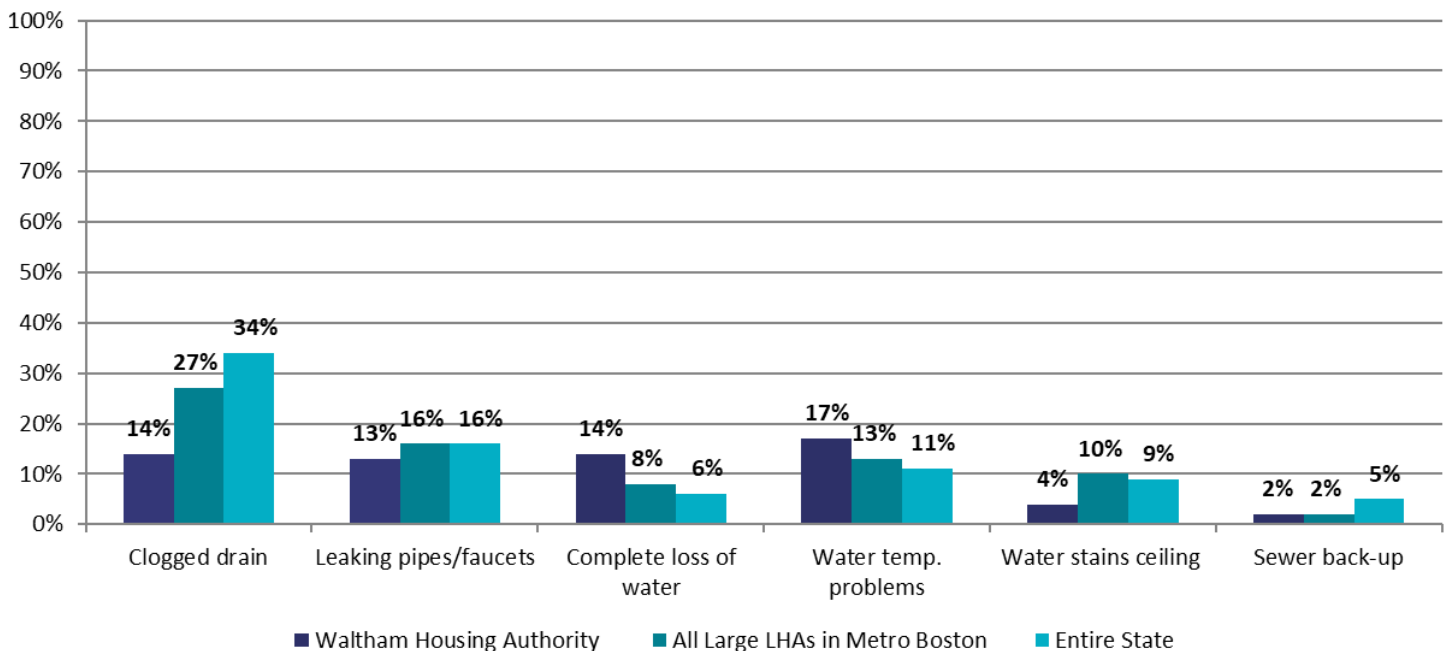
**How long did it usually take for hot water to come back on?** For those respondents who reported not having hot water in their apartment, we asked how long it usually took for the hot water to come back on – less than 24 hours, 24 - 48 hours, or more than 48 hours.



## • Other Water or Plumbing Problems

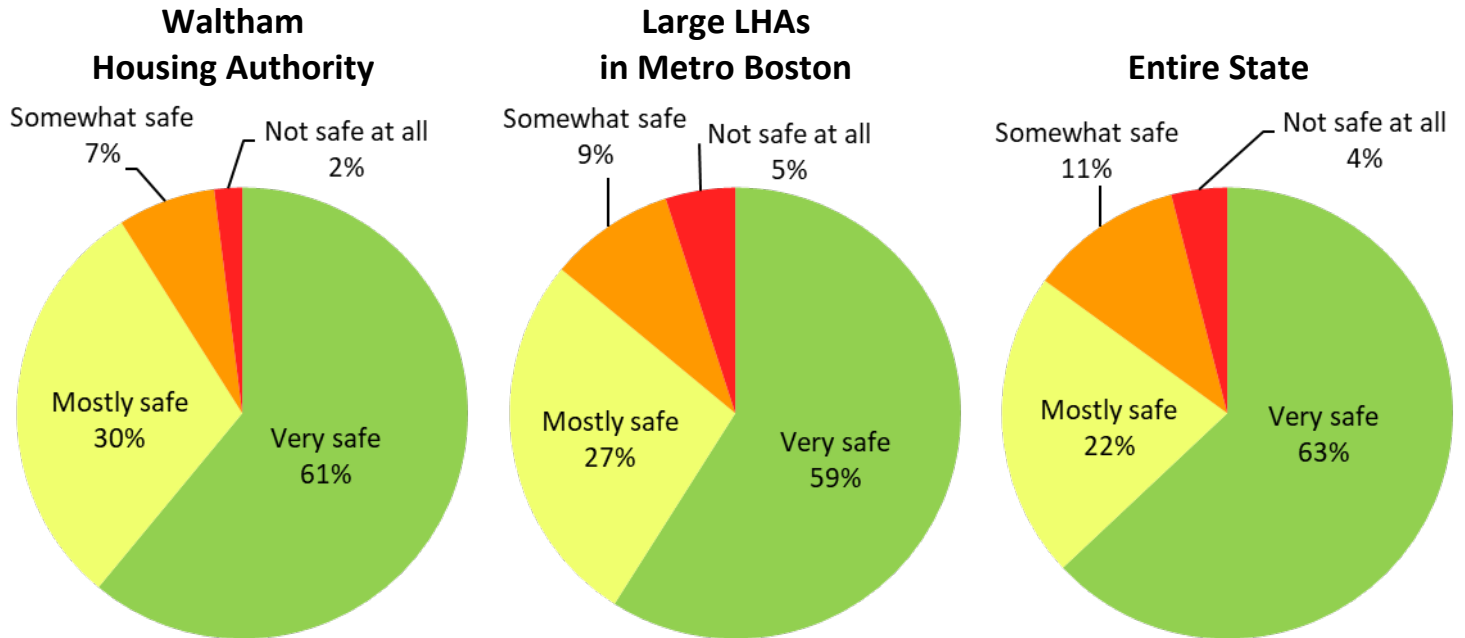
**In the last 12 months, did residents have other water or plumbing problems?**

The chart below shows what percentage of respondents had other water or plumbing problems in the last 12 months.

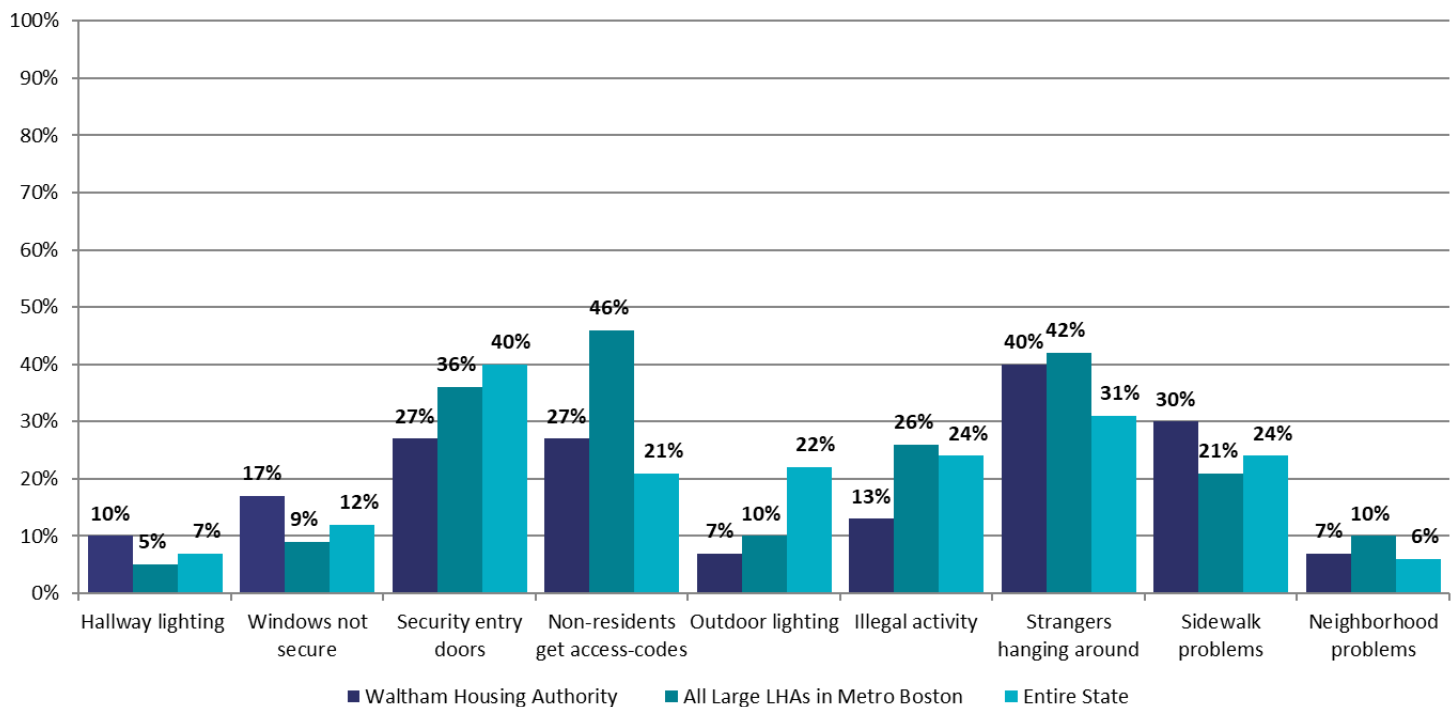


## Safety

- **Respondents were asked how safe they felt in their development.** The charts below show what percentage of residents said they felt very safe, mostly safe, somewhat safe, or not safe at all in their development in the last 12 months.

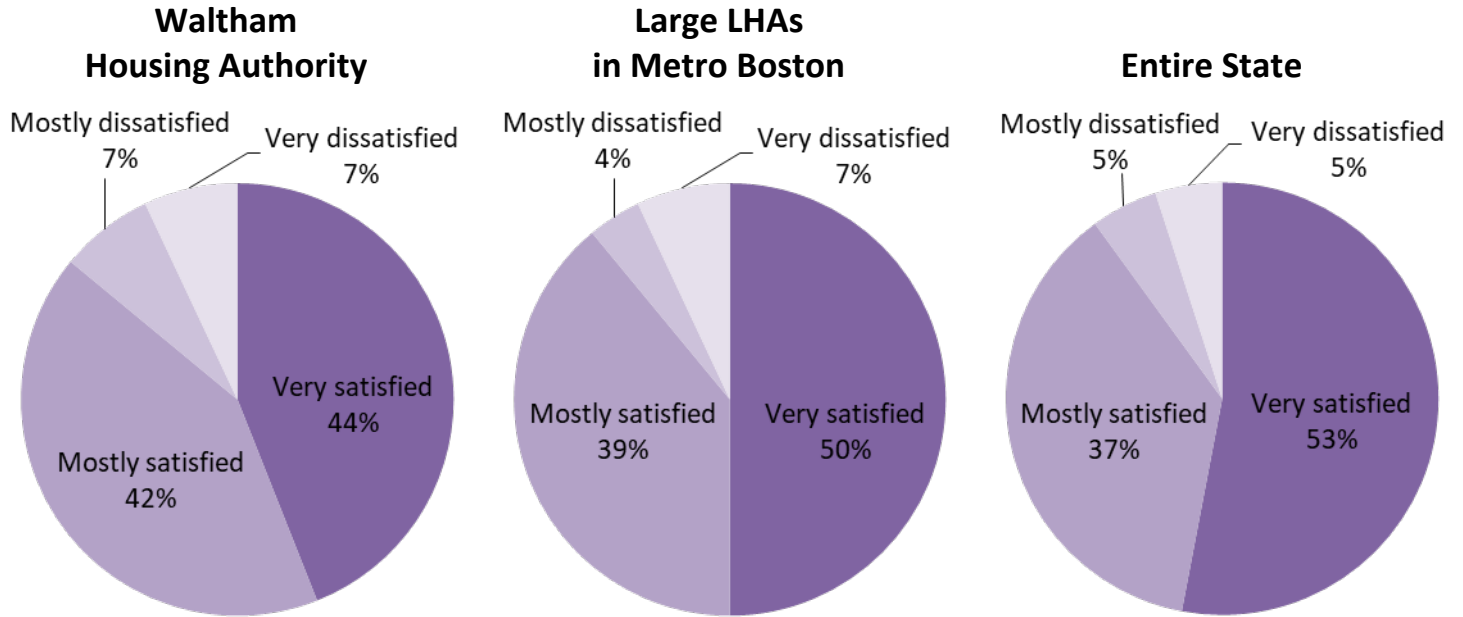


**Reasons why respondents felt unsafe in their development:** Respondents were asked why they felt unsafe in their development. This chart shows what specific concerns respondents mentioned.



## Overall Satisfaction

- **Respondents were asked about their overall satisfaction living in their development.** The chart below shows what percentage of people said they were very satisfied, mostly satisfied, mostly dissatisfied, or very dissatisfied.



## 2019 & 2024 Comparison

Residents of the Waltham Housing Authority were also surveyed in the fall of 2019.

### Fall of 2019:

- Surveys were sent to **200** Waltham housing units (Chapter 667). **101** surveys were filled out and returned.

### Fall 2024:

- Surveys were sent to **206** Waltham housing units (Chapter 667). **91** surveys were filled out and returned.

The next section of the report will show how the responses from 2019 compare to the responses from 2024.

## Communication Comparison

- **Communication with management:** Residents were asked about how they interacted with their Housing Authorities in the last 12 months.

	Fall 2019	Fall 2024
Felt they were usually or always treated with courtesy and respect when they contacted management.....	80%	79%
Knew the Executive Director held a meeting with residents.....	29%	12%

- **Communication with maintenance staff:** Residents were specifically asked about their interactions with the Waltham Housing Authority maintenance staff in the last 12 months.

	Fall 2019	Fall 2024
Felt they were treated with courtesy and respect when they contacted maintenance .....	85%	85%
Were contacted by the Housing Authority before entering their apartment .....	88%	95%

## Maintenance and Repair Comparison

### Overall maintenance:

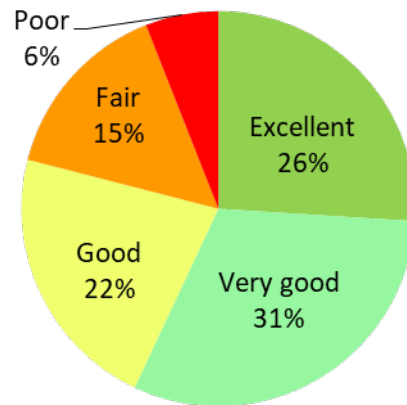
Respondents were asked how they would rate overall building maintenance (*such as clean halls and stairways and having lights and elevators that work*) and outdoor space maintenance (*such as litter removal and clear walkways*) in the last 12 months.

### Building maintenance:

**Fall  
2019**



**Fall  
2024**

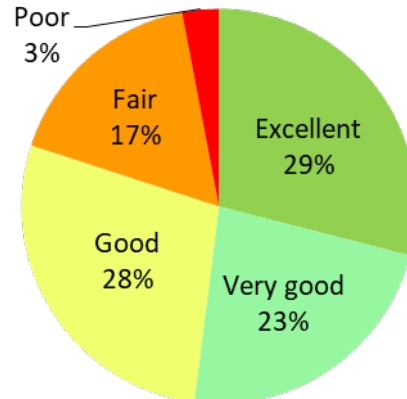


### Outdoor maintenance:

**Fall  
2019**



**Fall  
2024**



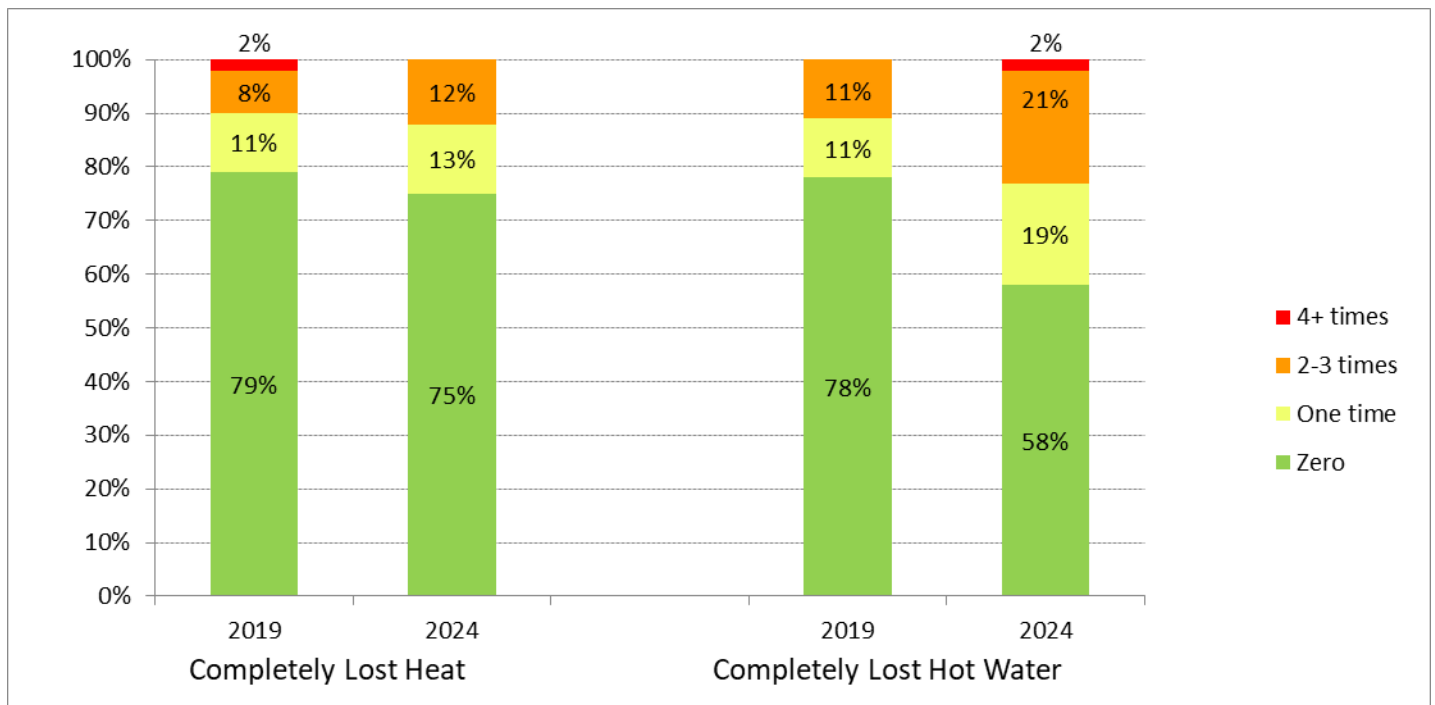
## Heating & Plumbing Problems:

- Percent of residents who had any kind of heating or plumbing problems in the last 12 months:

	Fall 2019	Fall 2024
Had any heating problem.....	39%	45%
Had any problem with water or plumbing.....	45%	57%

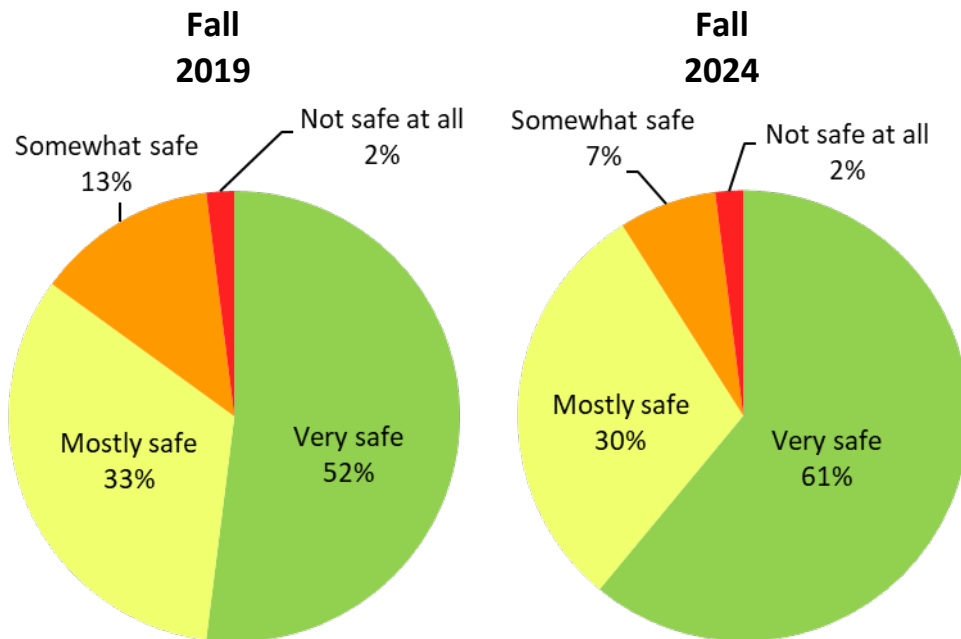
- How many times did residents completely lose heat or hot water in the last 12 months?**

The chart below shows how many times respondents completely lost heat in the last 12 months and how many times respondents completely lost hot water in the last 12 months.



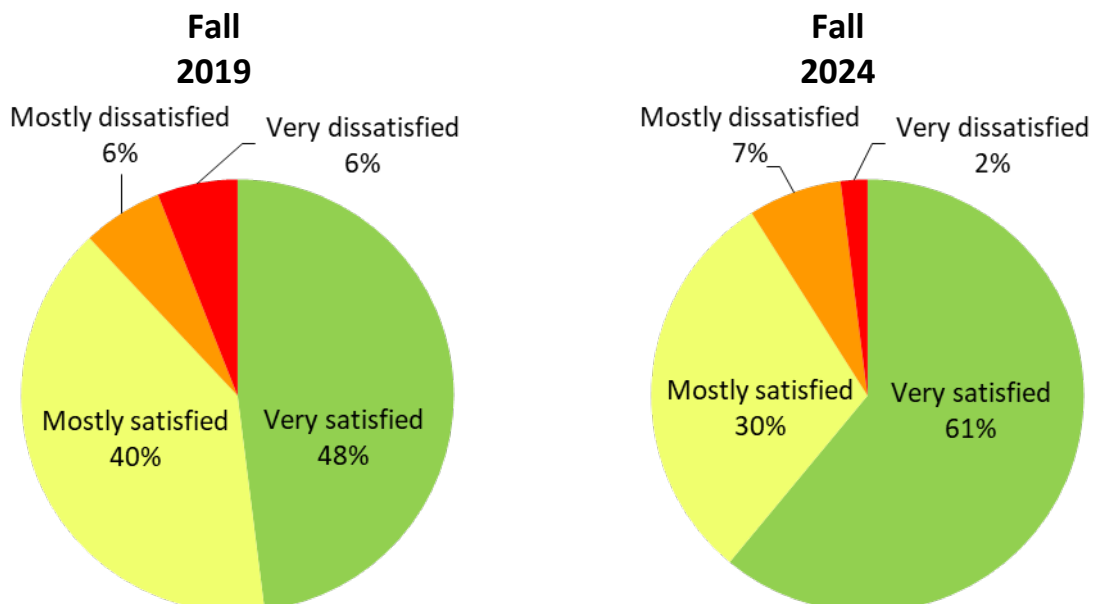
## Safety Comparison

- **Respondents were asked how safe they felt in their development.** The charts below shows how safe they felt in general in their development in the last 12 months.



## Overall Satisfaction Comparison

- **Respondents were asked about their overall satisfaction living in their development.** The chart below shows their level of satisfaction.





Resident Survey  
**WALTHAM HOUSING AUTHORITY**  
Chapter 200, 667 & 705 Housing  
Fall 2024

**NOTE**

This copy of the survey shows the percentage of respondents who chose each answer. EOHLC also collected demographic information from survey respondents, such as gender, race, education, and age. The responses to these demographic questions are not included in this report in order to protect the anonymity of respondents.

In the fall of 2024, surveys were sent to **501** housing units in the Waltham Housing Authority

- In Chapter 200/705 Housing, **295** surveys were sent out; **56** were completed and returned.
- In Chapter 667 Housing, **206** surveys were sent out; **91** were completed and returned.

The percentages presented here are based on those numbers.

**1. How many years have you lived in your current apartment?**

Chapter 200/705	Chapter 667	
20%	9%	Less than 2 years
23%	25%	2 to 5 years
18%	18%	6 to 10 years
39%	48%	More than 10 years

**Maintenance & Repair**

**8. In the last 12 months, how often were you treated with courtesy and respect by the maintenance staff of your development?**

Chapter 200/705	Chapter 667	
6%	6%	Never
9%	9%	Sometimes
30%	21%	Usually
55%	64%	Always

**9. Does the Housing Authority let you know before they enter your apartment?**

Chapter 200/705	Chapter 667	
96%	95%	Yes
2%	2%	No
2%	3%	Don't Know

**10. "Building maintenance" includes things such as clean halls and stairways and having lights and elevators that work. In the last 12 months, how would you rate the overall building maintenance?**

Chapter 200/705	Chapter 667	
11%	6%	Poor
9%	15%	Fair
30%	22%	Good
37%	31%	Very Good
13%	26%	Excellent

**11. In the last 12 months, how would you rate how well the outdoor space is maintained at your development (such as litter removal and clear walkways)?**

Chapter 200/705	Chapter 667	
20%	3%	Poor
11%	17%	Fair
25%	28%	Good
29%	23%	Very Good
15%	29%	Excellent

**12. In the last 12 months, how many times did you completely lose heat in your apartment?**

Chapter 200/705	Chapter 667	
69%	75%	Never → If Never, go to #14
16%	13%	Once
13%	12%	2 or 3 times
2%	0%	4 times or more

**13. How long did it usually take for your heat to come back on?**

Chapter 200/705	Chapter 667	
55%	67%	Less than 24 hours
28%	33%	24 to 48 hours
17%	0%	More than 48 hours



14. In the last 12 months, did you have any of these other heating problems?

		Chapter 200/705	Chapter 667
a.	Apartment was too hot	23%	7%
b.	Apartment was too cold	20%	25%
c.	Took too long for apartment to heat up	16%	9%
d.	Apartment felt too drafty	25%	17%

15. In the last 12 months, how many times did you have no hot water in your apartment?

Chapter 200/705	Chapter 667	
66%	58%	Never → If Never, go to #17
16%	19%	Once
16%	21%	2 or 3 times
2%	2%	4 times or more

16. How long did it usually take for the hot water to come back on?

Chapter 200/705	Chapter 667	
74%	90%	Less than 24 hours
26%	8%	24 to 48 hours
0%	2%	More than 48 hours

17. In the last 12 months, did you have any of these other water or plumbing problems?

		Chapter 200/705	Chapter 667
a.	Clogged drains (sink, toilet, shower)	20%	14%
b.	Leaking pipes or faucets	20%	13%
c.	Complete loss of water	5%	14%
d.	Water temperature problems (too hot, too cold, unreliable)	27%	17%
e.	Water stains on the ceiling	20%	4%
f.	Sewer backed-up into your apartment	2%	2%

## Communication

18. In the last 12 months, has the Executive Director at your development held any meetings with residents?

Chapter 200/705	Chapter 667	
0%	12%	Yes
60%	56%	No
40%	32%	Don't Remember

19. In the last 12 months, how often were you treated with courtesy and respect by the management office of your development?

Chapter 200/705	Chapter 667	
4%	11%	Never
14%	7%	Sometimes
39%	21%	Usually
43%	61%	Always

## Safety

20. In the last 12 months, in general, how safe did you feel in your development?

Chapter 200/705	Chapter 667	
44%	61%	Very safe → If Very safe, go to #22
31%	30%	Mostly safe
20%	7%	Somewhat safe
5%	2%	Not at all safe

21. For those who felt not at all, somewhat, or mostly safe: Why do you feel unsafe in your development?  
(Check all that apply.)

### Building/Indoor Concerns

Chapter 200/705	Chapter 667	
7%	10%	Not enough lighting in the hallways
21%	17%	Windows are not secure
25%	27%	Security of entry doors
11%	27%	Other tenants give door access code to non-residents

### Outdoor Concerns

Chapter 200/705	Chapter 667	
39%	7%	Not enough outdoor lights
18%	13%	Illegal activity in the development
32%	40%	Strangers hanging around who should not be there
7%	30%	Sidewalks are difficult to walk on

### Other Concerns

Chapter 200/705	Chapter 667	
0%	7%	The neighborhood/area the development is in
39%	10%	Another reason

22. Overall, how satisfied are you living in your development?

Chapter 200/705	Chapter 667	
41%	44%	Very satisfied
41%	42%	Mostly satisfied
14%	7%	Mostly dissatisfied
4%	7%	Very dissatisfied

# **WALTHAM HOUSING AUTHORITY**

## **Performance Management Review (PMR) Report**

**Fiscal Year End 9/30/2023**

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

<b>Executive Office of Housing and Livable Communities (EOHLC)</b> <b>PMR Desk Audit Ratings Summary</b> <b>Official Published PMR Record</b> For a detailed report of the Performance Management Review (PMR), please contact the Local Housing Authority	
Housing Authority	WALTHAM HOUSING AUTHORITY
Fiscal Year Ending	Sep 2023
Housing Management Specialist	Robert Pelletier
Facilities Management Specialist	Wilzor Exantus

Criteria	Score/Rating			
	Management			
Occupancy Rate	c.667	c.705	c.200	Cumulative
	No Findings	No Findings	No Findings	No Findings
Tenant Accounts Receivable (TAR)	c.667	c.705	c.200	Cumulative
	Corrective Action	Corrective Action	Corrective Action	Corrective Action
Board Member Training	No Findings			
Certifications and Reporting Submissions	Operational Guidance			
Annual Plan	No Findings			
	Financial			
Adjusted Net Income	Corrective Action			
Operating Reserves	Corrective Action			

EXECUTIVE OFFICE OF HOUSING AND LIVABLE COMMUNITIES (EOHLC) Staff Certification & Training Rating	
LHA Name	WALTHAM HOUSING AUTHORITY
FYE	Sep 2023
HMS Name	Robert Pelletier
FMS Name	Wilzor Exantus
Criteria	Rating
Staff Certification and Training	No Findings

EXECUTIVE OFFICE OF HOUSING AND LIVABLE COMMUNITIES (EOHLC) CFA Submission	
LHA Name	WALTHAM HOUSING AUTHORITY
FYE	Sep 2023
HMS Name	Robert Pelletier
FMS Name	Wilzor Exantus

CFA Submission (Planning Year)

Rating: No Rating

Recommendations: 1. No Recommendations

# EXECUTIVE OFFICE OF HOUSING AND LIVABLE COMMUNITIES (EOHLC)

## PMR Desk Audit Recommendations Report

LHA Name	WALTHAM HOUSING AUTHORITY
FYE	Sep 2023
HMS Name	Robert Pelletier
FMS Name	Wilzor Exantus

### Occupancy

Rating All: No Findings  
Rating 667: No Findings  
Rating 705: No Findings  
Rating 200: No Findings

1. No Recommendations

### Tenant Accounts Receivable (TAR)

Rating All: Corrective Action  
Rating 667: Corrective Action  
Rating 705: Corrective Action  
Rating 200: Corrective Action

1. We cannot evaluate the criteria for TAR because all of the quarterly reports have not been submitted to EOHLC. Please see Public Housing Notice 2018-08 for due dates.

### Board Member Training

Rating: No Findings

1. No Recommendations

### 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.

### 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. We cannot evaluate the criteria for ANI because all of the quarterly reports have not been submitted to EOHLC. Please see Public Housing Notice 2018-08 for due dates.

**Operating Reserve**

Rating: Corrective Action

1. We cannot evaluate the criteria for the Operating Reserve because all of the quarterly reports have not been submitted to EOHLC. Please see Public Housing Notice 2018-08 for due dates.

## EXECUTIVE OFFICE OF HOUSING AND LIVABLE COMMUNITIES (EOHLC)

### CHAMP Close Out Report

LHA Name	WALTHAM HOUSING AUTHORITY
FYE	Sep 2023
HMS Name	Robert Pelletier
FMS Name	Wilzor Exantus

#### CHAMP Criteria 1a

Rating: No Findings

Recommendations: 1. No Recommendations

#### CHAMP Criteria 1b

Rating: Corrective Action

Recommendations: 1. Prioritize the intake of CHAMP Paper Applications to ensure that all CHAMP Paper Applications are date and timestamped.  
2. Prioritize the data entry of CHAMP Paper Applications to ensure that all CHAMP Paper Applications are entered into CHAMP accurately.

#### CHAMP Criteria 1c

Rating: No Findings

Recommendations: 1. No Recommendations

#### CHAMP Criteria 2a

Rating: No Findings

Recommendations: 1. No Recommendations

#### CHAMP Criteria 2b

Rating: Operational Guidance

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 (Planning Year)

Rating: No Rating

Recommendations: 1. No Recommendations

CHAMP Criteria 3c (Planning Year)

Rating: No Rating

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	WALTHAM HOUSING AUTHORITY
FYE	Sep 2023
HMS Name	Robert Pelletier
FMS Name	Wilzor Exantus

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

Rating: No Findings

Recommendations:

1. In the future, every unit inspection requires a signature.
2. Ensure that work orders are created, tracked, and completed for all deficiencies identified during unit inspection
3. In the future, please attach the work orders that have the completed tasks and completion date.
4. Ensure that all work orders for all Health and Safety deficiencies are completed in the appropriate timeframe
5. Ensure that all Notices of Lease Violation are issued for all tenant related deficiencies identified during unit inspection
6. Ensure that all Lease Violations are resolved per EOHLC guidance
7. No lease violation was sent to the tenant.

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: Corrective Action

Recommendations: 1. No Recommendations

Criteria 3: Unit Inspection Reports accurately reflect necessary repairs

Rating: No Findings

Recommendations: 1. No Recommendations

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. Ensure that all Lease Violations are resolved per EOHLC guidance

2. 275-279 SCHOOL STREET - 1: Unit 277-4  
FLAMMABLES: Flammables  
or combustibles improperly  
stored  
Please remove foil paper  
around all stove top burners.  
Fires hazard.

3. 275-279 SCHOOL STREET - 1: Unit 277-4  
1. FLAMMABLES: Flammables  
or combustibles improperly  
stored.  
Please remove foil paper  
around all stove top burners.  
Fires hazard.

4. 10 DERMODY ROAD - 12: Unit 10F  
Health & Safety  
ELECTRICAL: Water or  
Rust/Liquid Streaks Present  
on or near electrical  
equipment  
The electrical extension cord is  
not rated for outside.

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. There were no Health and Safety deficiencies identified during the PMR Inspection.

