

FALL RIVER HOUSING AUTHORITY
Proposed Annual Plan for Fiscal Year 2027
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 EOHL.

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 FALL RIVER HOUSING AUTHORITY's Annual Plan for their 2027 fiscal year includes the following components:

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

State-Aided Public Housing Developments

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

Dev No	Type	Development Name	Num Bldgs	Year Built	Dwelling Units
705-02	Family	CORKY ROW	10	1991	24
200-02	Family	MAPLE GARDENS	50	1949	196
667-03	Elderly	BISHOP JOSEPH EID	1	1981	54
	Other	Other Special Occupancy units	4		32
Total			65		306

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.

FALL RIVER HOUSING AUTHORITY manages 104 MRVP vouchers.

Federally Assisted Developments

FALL RIVER HOUSING AUTHORITY also manages Federally-assisted public housing developments and/or federal rental subsidy vouchers serving 4517 households.

LHA Central Office

FALL RIVER HOUSING AUTHORITY
85 Morgan Street, P.O. Box 989 Fall River, MA 02722

Kevin Sbardella, Acting Executive Director
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LHA Board of Commissioners

	<u>Role</u>	<u>Category</u>	<u>From</u>	<u>To</u>
David Underhill	Member		06/19/2024	06/19/2029
Jason Burns	Member		11/22/2022	11/22/2027
Jo Ann Bentley	Member		07/15/2020	07/15/2025
John Medeiros	Member		08/30/2021	08/01/2026
Stephen R. Long	Chair		01/10/2024	07/12/2028

Plan History

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

REQUIREMENT		DATE COMPLETED
A.	Advertise the public hearing on the LHA website.	11/10/2025
B.	Advertise the public hearing in public postings.	11/10/2025
C.	Notify all LTOs or RAB (if there is one) of the hearing and provide access to the Proposed Annual Plan.	11/10/2025
D.	Post draft AP for tenant and public viewing.	11/10/2025
E.	Hold quarterly meeting with LTO or RAB to review the draft AP. (Must occur before the LHA Board reviews the Annual Plan.)	12/16/2025
F.	Annual Plan Hearing. Hosted by the LHA Board, with a quorum of members present. (For Boston, the Administrator will host the hearing.)	1/6/2026
G.	Executive Director presents the Annual Plan to the Board.	1/12/2026
H.	Board votes to approve the AP. (For Boston Housing Authority, the Administrator approves and submits the AP.)	1/12/2026

Certification

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

I, Kevin Sbardella, Acting Executive Director of the FALL RIVER HOUSING AUTHORITY, certify on behalf of the Housing Authority that I have conducted an annual review of all FALL RIVER 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 FALL RIVER 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, Kevin Sbardella, Acting Executive Director of the FALL RIVER 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: 1/22/2026

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)	\$2,226,343.63		Total of all FF awards minus prior FF spending
LHA Emergency Reserve	\$333,951.54		Amount to reserve for emergencies
Net FF Funds (First 3 Years of the CIP)	\$1,892,392.09	\$2,265,375.30	Funds to plan & amount actually planned in the first 3 years of the CIP
ADA Set-aside	\$25,497.59	\$21,217.83	Accessibility projects
DMH Set-aside	\$122,883.91	\$116,340.16	Dept. of Mental Health facility
DDS Set-aside	\$194,874.83	\$166,469.16	Dept. of Developmental Services facility
Unrestricted Formula Funding (FF)	\$1,549,135.75	\$1,961,348.15	Funds awarded by DHCD to be used on projects selected by the LHA and approved by DHCD.
Special DHCD Funding	\$11,987,203.73	\$11,966,403.73	Targeted awards from DHCD
Community Development Block Grant (CDBG) Funds	\$0.00	\$0.00	Federal funds awarded by a city or town for specific projects.
Community Preservation Act (CPA) Funds	\$0.00	\$0.00	Community Preservation Act funds awarded by a city or town for specific projects.
Operating Reserve(OR) Funds	\$35,598.45	\$35,598.45	Funds from the LHA's operating budget.
Other Funds	\$3,306,304.86	\$3,306,304.86	Funds other than those in the above categories. See explanation below.
Total funds and planned spending	\$17,221,499.12	\$17,573,682.33	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
095133	FF: Kitchen Cabinet and Countertop Replacement - DMH	Stanley Ray Streets 167-01	\$63,920	\$10,833	\$0	\$53,088	\$0	\$0	\$0	\$0
095146	FF: Vacancy Unit - Reduction - Initiative - 667-03	BISHOP JOSEPH EID 667-03	\$10,800	\$0	\$0	\$0	\$0	\$0	\$0	\$0
095148	FF: Replace Failing Fencing - 689-01	STAFFED APTS 689-01	\$16,500	\$0	\$0	\$0	\$10,901	\$0	\$0	\$0
095149	FF: Walkways & Patio Repairs 689-04	BULLOCK ST/OAK GROVE AVE 689-04	\$20,000	\$0	\$0	\$0	\$0	\$0	\$0	\$0
095150	FF: Replace Failing Fencing - 689-04	BULLOCK ST/OAK GROVE AVE 689-04	\$10,000	\$0	\$0	\$0	\$0	\$0	\$0	\$0
095151	FF: Bathtub/Shower Replacement	STAFFED APTS 689-01	\$27,500	\$0	\$0	\$26,400	\$1,100	\$0	\$0	\$0
095152	FF: Bathroom Plumbing Fixture Replacement	BATES/ORSWELL 689-03	\$34,000	\$7,071	\$0	\$25,262	\$1,668	\$0	\$0	\$0
095155	FF: Underground Elec phase 3	MAPLE GARDENS 200-02	\$256,827	\$254,110	\$0	\$1,464	\$0	\$0	\$0	\$0
095165	Replace Roof - DDS	STAFFED APTS 689-01	\$68,286	\$33,162	\$0	\$13,732	\$0	\$0	\$0	\$0
095170	Deck Replacement - DMH	Stanley Ray Streets 167-01	\$37,565	\$26,730	\$0	\$8,162	\$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
095173	Walkways & Fencing Replacement	BULLOCK ST/OAK GROVE AVE 689-04	\$36,152	\$9,847	\$0	\$25,320	\$0	\$0	\$0	\$0
095177	Gateway Award, ARPA Targeted - Maple Gardens Comprehensive Project	MAPLE GARDENS 200-02	\$12,245,236	\$408,113	\$0	\$946,716	\$4,199,404	\$0	\$0	\$0
095178	Interior Flooring, Trim & ADA Improvements - Stanley Ray St	Stanley Ray Streets 167-01	\$16,695	\$0	\$0	\$16,695	\$0	\$0	\$0	\$0
095179	Interior Flooring, Trim & ADA Improvements - Staffed Apts	STAFFED APTS 689-01	\$315,423	\$220,276	\$0	\$5,950	\$0	\$0	\$0	\$0
095180	ARPA Targeted-Fall River Fed Pac Panel and Fire Alarm Syst	167-01, 200-02, 667-03, 689-01, 689-02, 689-03	\$862,957	\$14,320	\$0	\$814,790	\$0	\$0	\$0	\$0
095185	ARPA FF: Security Camera Installation	MAPLE GARDENS 200-02	\$257,700	\$0	\$0	\$166,681	\$90,666	\$0	\$0	\$0
095186	Replacing 689 at 229 Highland Ave	HIGHLAND AVENUE 689-02	\$437,500	\$0	\$0	\$0	\$0	\$0	\$0	\$0
095187	DMH - Kitchen Updates	Stanley Ray Streets 167-01	\$18,082	\$0	\$0	\$18,082	\$0	\$0	\$0	\$0
095188	Replace Fire Pump - DHCD ER Request	BISHOP JOSEPH EID 667-03	\$15,750	\$0	\$0	\$15,750	\$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
095189	Install New 2nd Elevator - Bishop Eid	BISHOP JOSEPH EID 667-03	\$2,170,099	\$0	\$0	\$0	\$775,319	\$1,320,676	\$0	\$0
095190	Kitchen Stove/Oven Replacement Bishop Eid	BISHOP JOSEPH EID 667-03	\$285,858	\$0	\$0	\$233,663	\$41,410	\$0	\$0	\$0
095191	Replace Original Mechanical AC System	STAFFED APTS 689-01	\$18,299	\$0	\$0	\$3,301	\$0	\$0	\$0	\$0
095192	Replace Failing Gas Lines - Phase 2024	MAPLE GARDENS 200-02	\$336,301	\$0	\$0	\$10,783	\$0	\$0	\$0	\$0
095193	Security Camera Sys Upgrade - Bishop Eid	BISHOP JOSEPH EID 667-03	\$37,056	\$0	\$0	\$17,997	\$500	\$0	\$0	\$0
095194	Basement Foundation Improvements – Possible Resiliency/Funds	MAPLE GARDENS 200-02	\$408,100	\$0	\$0	\$45,096	\$363,005	\$0	\$0	\$0
095196	Fire Alarm Upgrade-Improvements - DHCD ER Request	HIGHLAND AVENUE 689-02	\$4,400	\$0	\$0	\$4,400	\$0	\$0	\$0	\$0
095197	Corkey Row 68-70 Boiler Replacement	CORKY ROW 705-02	\$680,625	\$0	\$0	\$75,210	\$605,416	\$0	\$0	\$0
095198	Smoke / CO Detector Modernization	CORKY ROW 705-02	\$37,813	\$0	\$0	\$36,482	\$1,332	\$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
095199	Flooring , Trim and ADA Improvements - Elmer / Corbett	STAFFED APTS 689-01	\$275,467	\$0	\$0	\$265,467	\$10,000	\$0	\$0	\$0
•	Maple Gardens Kitchens and Baths Upgrades-Phase 1	MAPLE GARDENS 200-02	\$831,875	\$0	\$0	\$0	\$44,586	\$353,051	\$434,239	\$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	Sustainability	Special Awards	CDBG	CPA	Operating Reserve	Other Funds
095133	FF: Kitchen Cabinet and Countertop Replacement - DMH	E-Bidding/E-Hosting rebate for #095133	\$0	\$0	\$0	\$450	\$0	\$0	\$0	\$0
095146	FF: Vacancy Unit - Reduction - Initiative - 667-03		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$10,800
095148	FF: Replace Failing Fencing - 689-01		\$0	\$0	\$0	\$0	\$0	\$0	\$5,600	\$0
095149	FF: Walkways & Patio Repairs 689-04		\$0	\$0	\$0	\$0	\$0	\$0	\$20,000	\$0
095150	FF: Replace Failing Fencing - 689-04		\$0	\$0	\$0	\$0	\$0	\$0	\$10,000	\$0
095177	Gateway Award, ARPA Targeted - Maple Gardens Comprehensive Project	gateway cities	\$0	\$118,799	\$0	\$8,904,436	\$0	\$0	\$0	\$3,222,000
095180	ARPA Targeted-Fall River Fed Pac Panel and Fire Alarm Syst	ARPA Targeted	\$530,111	\$0	\$0	\$332,846	\$0	\$0	\$0	\$0
095185	ARPA FF: Security Camera Installation	ARPA Formula Funding	\$0	\$0	\$0	\$257,700	\$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	Sustainability	Special Awards	CDBG	CPA	Operating Reserve	Other Funds
095186	Replacing 689 at 229 Highland Ave	095186 - Replacing 689 at 229 Highland Ave - sale proceeds \$420,000	\$0	\$0	\$0	\$420,000	\$0	\$0	\$0	\$0
095189	Install New 2nd Elevator - Bishop Eid	095189 - Install New 2nd Elevator - Bishop Eid - 2nd elevator	\$400,000	\$0	\$0	\$0	\$0	\$0	\$0	\$73,797
095190	Kitchen Stove/Oven Replacement Bishop EID	095190 kitchen stove replacement 667-3	\$0	\$285,858	\$0	\$0	\$0	\$0	\$0	\$0
095192	Replace Failing Gas Lines - Phase 2024	095192 - Replace Failing Gas Lines - Phase 2024- master meter award	\$0	\$336,301	\$0	\$0	\$0	\$0	\$0	\$0
095196	Fire Alarm Upgrade-Improvements - DHCD ER Request	095196 - Fire Alarm Upgrade-Improvements - DHCD ER Request	\$4,400	\$0	\$0	\$0	\$0	\$0	\$0	\$0
095197	Corkey Row 68-70 Boiler Replacement	095197 - Corkey Row 68-70 Boiler Replacement	\$680,625	\$680,625	\$0	\$0	\$0	\$0	\$0	\$0
095198	Smoke / CO Detector Modernization	095198 - Smoke / CO Detector Modernization	\$37,812	\$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	Sustainability	Special Awards	CDBG	CPA	Operating Reserve	Other Funds
095199	Flooring , Trim and ADA Improvements - Elmer / Corbett	095199 - Flooring , Trim and ADA Improvements - Elmer / Corbett	\$76,250	\$0	\$0	\$0	\$0	\$0	\$0	\$0

Capital Improvement Plan (CIP) Narrative

Including Requests to DHCD & Supporting Statements

1. Request for increased spending flexibility.

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

Fall River Housing Authority has not submitted an Alternate CIP.

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.

Fall River Housing Authority has not requested additional funding.

3. Overall goals of the Housing Authority's CIP

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:

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 .

7. Capital Planning System (CPS) updates

Fall River Housing Authority has not completed CPS updates. Our plan going forward is as follows:

8. Project priorities

We have included projects which are not high priority (Priority 1 or 2) with the following justification:

9. High priority deficiencies

We have included all of our high priority (CPS priority 1 and 2) projects in our CIP.

10. Accessibility

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

11. Special needs development

Fall River Housing Authority does not have a special needs (167 or 689 programs) development.

12. Energy and water consumption

Our 12 most recent monthly energy reports are for months 8/2024 to 7/2025.

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
	667-03 705-02	705-02		705-02 200-02

13. Energy or water saving initiatives

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

14. Vacancy rate

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

5.6% c. 667 (DHCD Goal 2%)

11.2% c. 200 (DHCD Goal 2%)

0% c. 705 (DHCD Goal 2%)

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 Executive Office of Housing and Livable Communities (EOHLC).

- I. **Emergencies** - Emergencies are only those conditions which are **immediately threatening** to the life or safety of our residents, staff, or structures.
 - Goal: initiated with 24 to 48 hours.
- II. **Vacancy Refurbishment - Work necessary to make empty units ready for new tenants.**
 - After emergencies, the refurbishment of vacancies for immediate re-occupancy has the highest priority for staff assignments. **Everyday a unit is vacant is a day of lost rent.**
 - **Goal: vacancy work orders are completed within 30 calendar days or if not completed within that timeframe, LHA has a waiver.**
- III. **Preventive Maintenance** - Work which must be done to **preserve and extend the useful life** of various elements of your physical property and avoid emergency situations.
 - A thorough Preventive Maintenance Program and Schedule that deals with all elements of the physical property is provided later in the document.
 - The Preventive Maintenance Program is reviewed and updated annually and as new systems and facilities are installed.
- IV. **Programmed Maintenance** - Work which is important and is completed to the greatest extent possible within time and budget constraints. Programmed maintenance is grouped and scheduled to make its completion as efficient as possible. Sources of programmed maintenance include:
 - Routine Work includes those tasks that need to be done on a regular basis to keep our physical property in good shape. (Mopping, Mowing, Raking, Trash, etc.)
 - Inspections are the other source of programmed maintenance.
 - ◇ Inspections are visual and operational examinations of parts of our property to determine their condition.
 - ◇ All dwelling units, buildings and sites must be inspected at least annually.
 - ◇ **Goal: Inspection-generated work orders are completed within 30 calendar days from the date of inspection, OR if cannot be completed within 30 calendar days, are added to the Deferred Maintenance Plan or the Capital Improvement Plan in the case of qualifying capital repairs (unless health/safety issue).**
- V. **Requested Maintenance** - Work which is requested by residents or others, does not fall into any category above, and should be accomplished as time and funds are available.
 - Requests from residents or others for maintenance work which does not fall into one of the other categories has the lowest priority for staff assignment.
 - **Goal: Requested work orders are completed in 14 calendar days from the date of tenant request or if not completed within that timeframe (and not a health or safety issue), the task is added and completed in a timely manner as a part of the Deferred Maintenance Plan and/or CIP.**

Emergency Request System

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

METHOD	CONTACT INFO.	TIMES
Call Answering Service	508-675-3502	4:00pm - 7:30am + Weekends & Holidays
Call LHA at Phone Number	508-675-3552	7:30am - 4:00pm Monday thru Friday
Other		

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

List of Emergencies - Emergencies are those conditions which are immediately threatening to the life or safety of our residents, staff, or structures. The following is a list of typical conditions that warrant an emergency response. If there is an emergency condition whether or not enumerated on this list please notify the office or answering service at the numbers listed above. If you have any questions regarding this list or other matters that may constitute an emergency, please contact the FALL RIVER 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	508-675-3502	4:00pm - 7:30am + Weekends & Holidays
Call Housing Authority Office	508-675-3552	7:30am - 4:00pm Monday thru Friday
Submit Online at Website		
Email to Following Email		
Other		

Work Order Management

- A. EOHLIC 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:

Maintenance Plan Narrative

Following are FALL RIVER 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?

We have received very favorable feedback as tenants still send us thank you letters complimenting maintenance staff that have provided some type of maintenance service to them. During our PM EOHLC that they did not need to see any Maintenance Reports.

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

We have not had to make any changes this year.

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

To continue to provide excellent service to our tenants as well as continue to make vacant units ready for occupancy in 29 days or less.

- 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	\$917,529.00	\$0.00
Last Fiscal Year Actual Spending	\$1,063,497.00	\$0.00
Current Fiscal Year Budget	\$924,757.00	\$0.00

- E. Unit Turnover Summary

# Turnovers Last Fiscal Year	22
Average time from date vacated to make unit "Maintenance Ready"	23 days
Average time from date vacated to lease up of unit	64 days

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

Attachments

These items have been prepared by the FALL RIVER 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.

FALL RIVER HOUSING AUTHORITY

Deferred Maintenance Plan

Deferred maintenance is maintenance upgrades, repairs or routine work that is postponed until future funds are available, weather conditions improve or for some other reason.

As an operating procedure the FRHA does not participate in a deferred maintenance program. It is understood that all work order category types should be addressed within the time frame assigned to the specific work order category. It is further understood that an emergency should never fall under deferred maintenance.

Should there be an absolute need to defer a maintenance issue, the appropriate work order will be generated and the Maintenance Leader/Foreman will confer with the Director of Maintenance. A spreadsheet will then be established, listing all the specifics, such as, date, description, location, cost and estimated completion date etc. This issue will later be discussed at the monthly scheduled maintenance meetings.

FALL RIVER HOUSING AUTHORITY

Mission Statement

To provide living units to all residents that are warm, dry and safe and also to exceed all building and sanitary codes.

To promote a safe environment for all employees and visitors while conducting ourselves as good neighbors within the community.

FALL RIVER HOUSING AUTHORITY

Preventative Maintenance Plan

There are several components that make up the FRHA preventative maintenance plan.

Quarterly Building & Ground Inspections:

To be conducted January-March, April-June, July-September, October-December. The FMM/Leader conduct these inspections of common areas (to include hallways, stairwells, community rooms), building systems, building exterior, and site (to include grounds, fences, parking lots, private roads, sidewalks, play areas) for any potential problems in accordance with UPCS standards while utilizing the quarterly B & G inspection form.

Heating & Hot Water Systems:

The FRHA trades people conduct annual inspections and servicing of these building systems.

Fire Alarm & Sprinkler Systems:

The FRHA contracts with independent contractors for the inspection and testing of these systems.

Small Engine Equipment:

The FRHA contracts with independent contractors for the servicing of small engine machines.

Vehicle Fleet:

The FRHA has all maintenance vehicles serviced by local service centers on an annual basis.

Security Cameras:

The FRHA has contracted with an independent consultant for the servicing of all cameras and equipment.

FALL RIVER HOUSING AUTHORITY

Emergency Response Service

The FRHA does have an after hour on call system to respond to emergency maintenance request twenty four (24) hours a day with a work order system that documents the results of that response.

The Maintenance Answering Service notifies the second shift staff person between the hours of 4:00pm – 12:30am for any resident requested work order, and the on-call supervisor from 12:30am – 7:30am for any resident requested work order. This includes weekends and holidays. The After Hour work order log is then forwarded to the Work Order Clerk on the next business day to be entered into the work order database.

FALL RIVER HOUSING AUTHORITY

Work Order Category Type

1. Annual Inspections:

Any deficiencies found during FRHA annual inspection of all units.
To be completed (30 days or less)

2. Emergencies:

Fire, Flooding, Gas odor, Power failure, No heat, Blocked toilet, Blocked drain, No hot water, Smoke/CO detector failure, Lock out, Appliance failure
To be completed (24-48 hours or less)

3. Vacancies:

Any work required to turnover for occupancy as soon as possible.
To be completed (30 days or less)

4. Preventative Maintenance:

Quarterly Building & Grounds inspections, annual building system inspections, servicing and testing.
To be completed (30 days or less)

5. Routine:

Weekly cleaning of offices, maintenance areas, laundry rooms, community rooms, grounds, grass cutting and snow removal.
To be completed (7 days or less)

6. Requested:

Resident generated requests.
To be completed (14 days or less)

FALL RIVER HOUSING AUTHORITY

After Hours Work Order Processing (Monday through Friday 4:00pm – 7:30am Weekends & Holidays)

Summary

If the request for maintenance is reported between 4:00pm and 12:30am including weekends and holidays, the maintenance answering service notifies the Second Shift staff person for work order completion. If the request for maintenance is deemed an emergency in accordance with FRHA guidelines, the second shift staff person will contact the on-call supervisor. The supervisor will travel to the location and initiate the appropriate action to abate the emergency and totally resolve the problem if possible.

If the request for maintenance is reported between 12:30am and 7:30am including weekends and holidays, the maintenance answering service notifies the on call supervisor. The on-call supervisor will then initiate the appropriate action to abate the emergency or complete the request for maintenance by utilizing the Amp staff person first, then the two (2) or four (4) hour overtime list accordingly, to resolve the problem.

The After Hour work order log is then forwarded to the work order clerk on the next business day to be entered into the work order database.

FALL RIVER HOUSING AUTHORITY

Work Order Processing (Monday through Friday 7:30am – 4:00pm)

Summary

During regular business hours, the site management office receives requests for work orders, enters all pertinent information into the Work Order database including a job priority code, and generates the work order. Once the work order has been processed in the system, it is distributed to the site Facilities Maintenance Manager/Working Leader who is responsible for coordinating the completion of all work orders for the Development/Amp in a timely fashion based on its priority status. The FMM/Working Leader assigns each work order to a maintenance worker for completion.

From time to time, the Director of Maintenance/Building & Grounds may determine to initiate the work process on an order that has yet to be processed through the computer/work order system. This may happen either due to the emergency status of the job or as a result of staff availability. In such a case, the Director of Maintenance/Building & Grounds will give a directive in lieu of a work order, once the work order is generated, it will be completed and closed out in the system.

Upon receipt of the work order, the staff person goes to the location to begin the job. If the staff person is unable to complete the task, gain access to the unit, or lacks the available parts, they should write the explanation on the work order and inform the FMM/Leader so that arrangements can be made for completion. If the work can be completed, the assigned staff person should fill in the appropriate section of the work order and return to the FMM/Leader so that it can be closed out by the Work Order Clerk in the computer system.

FALL RIVER HOUSING AUTHORITY

Vehicle Fleet Service Procedure

Objective:

To ensure the safe and continuous operation of all maintenance vehicles listed below:

2018	F150	White	
2017	F250	White	
2017	F350	White	
2017	F350	White	
✘	2016	F250	White Surplus Removed
	2014	F350	Green
	2012	F450	White
	2009	F350	Green
	2006	Ranger	Green
	1995	Van	Green
	2021	Transit Van	(White)
	2021	Transit Van	(White)

Policies & Procedures:

Currently all vehicles receive annual routine maintenance at various service centers.

Reports:

Service Invoices.

FALL RIVER HOUSING AUTHORITY

Small Equipment Maintenance Procedure

Objective:

To ensure the safe and continuous operation of all maintenance equipment.

Policies & Procedures:

All landscaping equipment is serviced in the winter months and all snow removal equipment is serviced in the summer months by the FRHA independent contractor, currently, **HELGER'S SOUTH COAST POWER EQUIPMENT.**

Reports:

Service Invoices.

FALL RIVER HOUSING AUTHORITY

Heating System Inspection and Service Procedure

Objective:

To ensure the continuous, efficient operation of the heating systems.

Policies & Procedures:

1. Heating systems located in the Family Developments are serviced by in house plumbers on even calendar years.
2. Heating systems located in the Elderly Developments are serviced by in house plumbers on odd calendar years.

Any problems identified by the plumbers during servicing are to be reported to the Director of Maintenance.

Reports:

Completed work order.

FALL RIVER HOUSING AUTHORITY
Elevator Inspection and Service Procedure

Objective:

To ensure the safe and continuous operation of all elevators at the following properties listed below:

Two (2) Bates & Tower
Four (4) Cardinal Medeiros Tower
Two (2) Barresi Heights
Two (2) Cottell Heights
Two (2) Mitchell Heights
Two (2) Oliveira Apartments
Two (2) O'Brien Apartments
Two (2) Holmes Apartments
One (1) Bishop Eid Apartments

Policies & Procedures:

1. Daily, the site maintenance staff person will clean the elevator cabs and sills, check the lighting in the cab and replace any burnt out bulbs, check all call buttons, and determine that each elevator is operable. In the event that an elevator is not functioning properly, he/she will report this to the site Facilities Maintenance Manager/Working Leader, who in turn will contact the service contractor, currently, **DELTA-BECKWITH**.
2. The service contractor is responsible for inspecting and servicing each elevator at least twice a month. The tasks to be completed and the frequency for each task are defined in the elevator preventative maintenance agreement.

Reporting:

1. The site staff person notes any problem with the elevator cabs or general operation and reports verbally to the Facilities Maintenance Manager/Working Leader.
2. The service contractor is responsible for filling in the Elevator Preventative Maintenance Chart maintained at the time of each servicing.

External Inspection:

Annual inspection performed by State Elevator Inspector.

FALL RIVER HOUSING AUTHORITY

Emergency Generator

Objective:

To ensure the continuous provision of power to key building systems during electrical power outages.

Policies & Procedures:

The site maintenance person is responsible for monitoring and maintaining a log of the programmed weekly test to ensure the continuous provision of power to the development.

Annually, the FRHA electrician along with their independent contractor, currently **RALCO ELECTRIC**, will perform a general inspection.

Any problems identified by the electrician during the inspection are to be reported to the Facilities Management Department.

Reports:

Inspection Report delivered to the Facilities Management Department.

FALL RIVER HOUSING AUTHORITY

Electrical System Inspection Procedure

Objective:

To ensure the continuous provision of electricity to all Federal and State sites.

Policies & Procedures:

The electricians are responsible for performing all tasks necessary to ensure the continuous provision of electricity to the development.

Annually, the electricians will perform a general inspection of the electrical system including (but not necessarily limited to):

- A.** Pulling the main circuitry boards
- B.** Checking all circuit breakers and circuit breaker boxes
- C.** Checking all main feeders
- D.** Tightening all lugs

Any problem identified by the electrician during the inspection are to be reported to the Facilities Management Department.

Reports:

Completed Work Order.

FALL RIVER HOUSING AUTHORITY
Back Flow Prevention Inspection Procedure

Objective:

To prevent water from flowing back into the water supply.

Policies & Procedures:

1. Annually, the local water & sewer department will perform a back flow inspection.
2. All repairs or replacement of the back flow valves will be made by a licensed Back Flow Technician.

Reports:

The local water & sewer department will provide a copy of the inspection report.

FALL RIVER HOUSING AUTHORITY

Roof Inspection and Service Procedure

Objective:

To identify necessary maintenance, repair and replacement of building roofs to minimize damage to facilities resulting from faulty roofing.

Policies & Procedures:

At least quarterly, the Facilities Maintenance Manager/Working Leader will inspect the flat roofs for:

- A.** Clogged drains and water standing on the roof;
- B.** Debris requiring removal;
- C.** Problems with exhaust fans;
- D.** Signs of flashing discrepancies;

Periodically these inspections should be made while it is raining.

Reports:

Quarterly "Building and Grounds Inspection" reports to be submitted to the Facilities Management Department.

FALL RIVER HOUSING AUTHORITY

Fire Extinguisher Policy and Procedure

Objective:

To ensure that all fire extinguishers are in proper working order and maintained in accordance with applicable codes.

Policy & Procedure:

1. Routinely the Facilities Maintenance Manager/Working Leader is responsible for checking that all fire extinguishers are in their proper location and that the seal is unbroken and the inspection tags are in place. Any exception should be noted on the "Building & Grounds Inspection" report and brought to the attention of the Director of Building and Grounds.
2. Annually, all fire extinguishers are inspected by an independent contractor, currently **FIRE PRO**. Inspections are noted by the contractor on the inspection tag attached to each unit.
3. At least every five (5) years, each unit must be pressure tested by an independent contractor.

Reporting:

1. The Facilities Maintenance Manager/Working Leader is responsible for reporting any missing or damaged fire extinguishers on the "Building & Grounds Inspection" report.
2. Annual inspections will be noted on the inspection tag attached to each extinguisher by the contractor.

FALL RIVER HOUSING AUTHORITY

Fire Alarm System Inspection and Service Procedure

Objective:

To ensure that the fire alarm system is operating properly and is maintained in accordance with applicable ordinances and codes.

Policies & Procedures:

1. Fire Alarm System Inspection and Servicing is conducted by an independent licensed contractor, currently **RUSTIC FIRE PROTECTION**, who will be responsible for inspecting and servicing each alarm system at least every three months.
2. At least annually the contractor will test each device related to the system to ensure it is functioning properly. Each pull station, smoke detector and heat detector will be tested. It is typical that 25% of these devices will be tested each quarter as the contractor perform his/her quarterly inspection and servicing.

Reporting:

The independent contractor submits copies of the "Quarterly Inspection Report" to both the Facilities Management Department and the local Fire Department.

FALL RIVER HOUSING AUTHORITY
Sprinkler System Inspection and Service Procedure

Objective:

To ensure the continuous, efficient operation of the sprinkler system.

Policies & Procedures:

1. Annually, site management staff conduct apartment inspections, and all sprinkler heads should be visually inspected as part of the inspection. Any appearance of a deficiency should be reported following the proper work order procedure.
2. Sprinkler systems require servicing and inspection by an independent licensed sprinkler system company. The servicing process should include, but not limited to, the following:
 - a. Flow testing to insure that the fire alarm will go off if the sprinkler system is triggered.
 - b. Sprinkler pump testing for fire pump and/or jockey pump. (The contractor may subcontract this testing)
3. Sprinkler System Inspections are tested quarterly by FRHA independent contractor currently, **RUSTIC FIRE PROTECTION.**

Reporting:

Independent Contracting Reports are generated during quarterly inspections with copies to the Facilities Management Department as well as the local Fire Department.

FALL RIVER HOUSING AUTHORITY

Smoke Detector and Carbon Monoxide Inspection Procedure

Objective:

To ensure that all smoke detectors and carbon monoxide detectors are operable.

Policies & Procedures:

1. Routinely, all maintenance staff are instructed to have (batteries, extra devices) on their person when dispatched to any type of work order request inside a residential unit. Should it be discovered that any of these devices is inoperable it should be repaired/replaced at that time.
2. Annually, site management staff conducts apartment inspections and both devices should be tested as part of the inspection, any failures should be reported following the proper work order procedure.
3. Common area devices are tested quarterly by the FRHA independent contractor currently, **RUSTIC FIRE PROTECTION**.

Reports:

Quarterly Building & Grounds inspection reports to be submitted to the Facilities Management Department. Apartment Inspection Reports are submitted to the site management office and Independent Contractor Reports are generated during quarterly inspections with copies to the Facilities Management Department as well as the local Fire Department.

THE FALL RIVER HOUSING AUTHORITY
Policies and Procedures for Apartment Inspection

Summary

Apartment Inspections are performed by the FRHA site management staff. These inspections are to be performed in accordance with Federal Standard Uniform Physical Conditions Standards (UPCS) so that all units are decent, safe, sanitary and in good condition. At least forty eight (48) hours prior to the inspection, the site management staff prepares and delivers a written notice advising the resident that the unit will be inspected. If the resident denies access or fails to respond, the inspection will be rescheduled, and a second notice is then delivered to the resident. If access is still denied, then the FRHA staff will follow legal lease procedure that authorizes FRHA staff to enter the unit and complete the inspection. These procedures are performed at all Federal and State Site Properties.

Once in the unit, the staff person will conduct housekeeping and UPCS inspection, documenting any sanitary code violation, damage to the unit, and needed repair on the inspection form. Upon completion of the inspection, the staff person may if possible, have the resident sign the inspection form and provide a copy. The staff person then returns the inspection reports to the office in order to generate necessary work orders to make all necessary repairs. In the event that a repair is an emergency, the site staff contacts the Maintenance Department/Work order Clerk to report the emergency repair.

FALL RIVER HOUSING AUTHORITY

Policies and Procedures for Apartment Inspections

Functional Overview

Each occupied residential unit under the management of the Fall River Housing Authority (FRHA) must be inspected at least annually to ensure that the unit meets the Standard of the State Sanitary Code and FEDERAL STANDARD HUD UPCS standards as well as to identify any necessary maintenance or property damages caused by the residents or routine wear and tear. Additionally, the apartment inspection provides development staff with the opportunity to perform a housekeeping inspection to ensure that the resident is maintaining the unit in accordance with the standards defined in the lease. As landlord, the FRHA is responsible for code compliance regardless of the cause (i.e. resident induced violation). The inspection provides FRHA staff with the opportunity to evaluate firsthand the resident's compliance with the terms of the lease. A copy of the form to be used in the inspection is attached hereto as an appendix to this plan.

INTRODUCTION

The Fall River Housing Authority administers over 2300 units of family, elderly and disabled affordable housing at twenty six (26) locations. It is committed to maintaining warm, dry, safe and clean residential units beyond the minimum standard.

The maintenance plan which follows has four essential components: Apartment Inspections, System Inspections, Work Order Processing and Preventative Maintenance. The Fall River Housing Authority recognizes that the performance of these tasks is essential if the FRHA is to reach their stated objective.

In furtherance of its objective the Authority shall use the FEDERAL STANDARD HUD UPCS inspection standard in performing all of the inspections performed upon its properties.

FALL RIVER HOUSING AUTHORITY

MAINTENANCE PLAN

TABLE OF CONTENTS

Introduction	3
Policies & Procedures for Apartment Inspection	4
Smoke and Carbon Monoxide Detector Inspection	6
Sprinkler System Inspection and Service Procedure	7
Fire Alarm System Inspection and Service Procedure	8
Fire Extinguisher Inspection and Service Procedure	9
Roof Inspection and Service Procedure	10
Back Flow Prevention Inspection Procedure	11
Electrical System Inspection and Procedure	12
Emergency Generator Inspection and Service Procedure w/Report	13
Elevator Inspection and Service Procedure	14
Heating System Inspection and Service Procedure	15
Small Equipment Maintenance Procedure	16
Vehicle Fleet Service Procedure	17
Work Order Processing	18
After Hours Work Order Processing	19
Emergency Response Service	21
Preventative Maintenance Plan	22
Mission Statement	23
Deferred Maintenance Plan	24
Appendix (Apartment Inspection and Building & Grounds Inspection Form)	

FALL RIVER HOUSING AUTHORITY

MAINTENANCE PLAN

Prepared: October 2018

FALL RIVER HOUSING AUTHORITY

Deferred Maintenance Plan

Deferred maintenance is maintenance upgrades, repairs or routine work that is postponed until future funds are available, weather conditions improve or for some other reason.

As an operating procedure the FRHA does not participate in a deferred maintenance program. It is understood that all work order category types should be addressed within the time frame assigned to the specific work order category. It is further understood that an emergency should never fall under deferred maintenance.

Should there be an absolute need to defer a maintenance issue, the appropriate work order will be generated and the Maintenance Leader/Foreman will confer with the Director of Maintenance. A spreadsheet will then be established, listing all the specifics, such as, date, description, location, cost and estimated completion date etc. This issue will later be discussed at the monthly scheduled maintenance meetings.

FALL RIVER HOUSING AUTHORITY

Mission Statement

To provide living units to all residents that are warm, dry and safe and also to exceed all building and sanitary codes.

To promote a safe environment for all employees and visitors while conducting ourselves as good neighbors within the community.

FALL RIVER HOUSING AUTHORITY

Preventative Maintenance Plan

There are several components that make up the FRHA preventative maintenance plan.

Quarterly Building & Ground Inspections:

To be conducted January-March, April-June, July-September, October-December. The FMM/Leader conduct these inspections of common areas (to include hallways, stairwells, community rooms), building systems, building exterior, and site (to include grounds, fences, parking lots, private roads, sidewalks, play areas) for any potential problems in accordance with UPCS standards while utilizing the quarterly B & G inspection form.

Heating & Hot Water Systems:

The FRHA trades people conduct annual inspections and servicing of these building systems.

Fire Alarm & Sprinkler Systems:

The FRHA contracts with independent contractors for the inspection and testing of these systems.

Small Engine Equipment:

The FRHA contracts with independent contractors for the servicing of small engine machines.

Vehicle Fleet:

The FRHA has all maintenance vehicles serviced by local service centers on an annual basis.

Security Cameras:

The FRHA has contracted with an independent consultant for the servicing of all cameras and equipment.

FALL RIVER HOUSING AUTHORITY

Emergency Response Service

The FRHA does have an after hour on call system to respond to emergency maintenance request twenty four (24) hours a day with a work order system that documents the results of that response.

The Maintenance Answering Service notifies the second shift staff person between the hours of 4:00pm – 12:30am for any resident requested work order, and the on-call supervisor from 12:30am – 7:30am for any resident requested work order. This includes weekends and holidays. The After Hour work order log is then forwarded to the Work Order Clerk on the next business day to be entered into the work order database.

FALL RIVER HOUSING AUTHORITY

Work Order Category Type

1. Annual Inspections:

Any deficiencies found during FRHA annual inspection of all units.
To be completed (30 days or less)

2. Emergencies:

Fire, Flooding, Gas odor, Power failure, No heat, Blocked toilet, Blocked drain, No hot water, Smoke/CO detector failure, Lock out, Appliance failure
To be completed (24-48 hours or less)

3. Vacancies:

Any work required to turnover for occupancy as soon as possible.
To be completed (30 days or less)

4. Preventative Maintenance:

Quarterly Building & Grounds inspections, annual building system inspections, servicing and testing.
To be completed (30 days or less)

5. Routine:

Weekly cleaning of offices, maintenance areas, laundry rooms, community rooms, grounds, grass cutting and snow removal.
To be completed (7 days or less)

6. Requested:

Resident generated requests.
To be completed (14 days or less)

FALL RIVER HOUSING AUTHORITY

After Hours Work Order Processing (Monday through Friday 4:00pm – 7:30am Weekends & Holidays)

Summary

If the request for maintenance is reported between 4:00pm and 12:30am including weekends and holidays, the maintenance answering service notifies the Second Shift staff person for work order completion. If the request for maintenance is deemed an emergency in accordance with FRHA guidelines, the second shift staff person will contact the on-call supervisor. The supervisor will travel to the location and initiate the appropriate action to abate the emergency and totally resolve the problem if possible.

If the request for maintenance is reported between 12:30am and 7:30am including weekends and holidays, the maintenance answering service notifies the on call supervisor. The on-call supervisor will then initiate the appropriate action to abate the emergency or complete the request for maintenance by utilizing the Amp staff person first, then the two (2) or four (4) hour overtime list accordingly, to resolve the problem.

The After Hour work order log is then forwarded to the work order clerk on the next business day to be entered into the work order database.

FALL RIVER HOUSING AUTHORITY

Work Order Processing (Monday through Friday 7:30am – 4:00pm)

Summary

During regular business hours, the site management office receives requests for work orders, enters all pertinent information into the Work Order database including a job priority code, and generates the work order. Once the work order has been processed in the system, it is distributed to the site Facilities Maintenance Manager/Working Leader who is responsible for coordinating the completion of all work orders for the Development/Amp in a timely fashion based on its priority status. The FMM/Working Leader assigns each work order to a maintenance worker for completion.

From time to time, the Director of Maintenance/Building & Grounds may determine to initiate the work process on an order that has yet to be processed through the computer/work order system. This may happen either due to the emergency status of the job or as a result of staff availability. In such a case, the Director of Maintenance/Building & Grounds will give a directive in lieu of a work order, once the work order is generated, it will be completed and closed out in the system.

Upon receipt of the work order, the staff person goes to the location to begin the job. If the staff person is unable to complete the task, gain access to the unit, or lacks the available parts, they should write the explanation on the work order and inform the FMM/Leader so that arrangements can be made for completion. If the work can be completed, the assigned staff person should fill in the appropriate section of the work order and return to the FMM/Leader so that it can be closed out by the Work Order Clerk in the computer system.

FALL RIVER HOUSING AUTHORITY

Vehicle Fleet Service Procedure

Objective:

To ensure the safe and continuous operation of all maintenance vehicles listed below:

2018 F150	White	
2017 F250	White	
2017 F350	White	
2017 F350	White	
✘ 2016 F250	White	Surplus Removed
2014 F350	Green	
2012 F450	White	
2009 F350	Green	
2006 Ranger	Green	
1995 Van	Green	
2021 Transit Van	(White)	
2021 Transit Van	(White)	

Policies & Procedures:

Currently all vehicles receive annual routine maintenance at various service centers.

Reports:

Service Invoices.

FALL RIVER HOUSING AUTHORITY

Small Equipment Maintenance Procedure

Objective:

To ensure the safe and continuous operation of all maintenance equipment.

Policies & Procedures:

All landscaping equipment is serviced in the winter months and all snow removal equipment is serviced in the summer months by the FRHA independent contractor, currently, **HELGER'S SOUTH COAST POWER EQUIPMENT.**

Reports:

Service Invoices.

FALL RIVER HOUSING AUTHORITY

Heating System Inspection and Service Procedure

Objective:

To ensure the continuous, efficient operation of the heating systems.

Policies & Procedures:

1. Heating systems located in the Family Developments are serviced by in house plumbers on even calendar years.
2. Heating systems located in the Elderly Developments are serviced by in house plumbers on odd calendar years.

Any problems identified by the plumbers during servicing are to be reported to the Director of Maintenance.

Reports:

Completed work order.

FALL RIVER HOUSING AUTHORITY
Elevator Inspection and Service Procedure

Objective:

To ensure the safe and continuous operation of all elevators at the following properties listed below:

Two (2) Bates & Tower
Four (4) Cardinal Medeiros Tower
Two (2) Barresi Heights
Two (2) Cottell Heights
Two (2) Mitchell Heights
Two (2) Oliveira Apartments
Two (2) O'Brien Apartments
Two (2) Holmes Apartments
One (1) Bishop Eid Apartments

Policies & Procedures:

1. Daily, the site maintenance staff person will clean the elevator cabs and sills, check the lighting in the cab and replace any burnt out bulbs, check all call buttons, and determine that each elevator is operable. In the event that an elevator is not functioning properly, he/she will report this to the site Facilities Maintenance Manager/Working Leader, who in turn will contact the service contractor, currently, **DELTA-BECKWITH**.
2. The service contractor is responsible for inspecting and servicing each elevator at least twice a month. The tasks to be completed and the frequency for each task are defined in the elevator preventative maintenance agreement.

Reporting:

1. The site staff person notes any problem with the elevator cabs or general operation and reports verbally to the Facilities Maintenance Manager/Working Leader.
2. The service contractor is responsible for filling in the Elevator Preventative Maintenance Chart maintained at the time of each servicing.

External Inspection:

Annual inspection performed by State Elevator Inspector.

FALL RIVER HOUSING AUTHORITY

Emergency Generator

Objective:

To ensure the continuous provision of power to key building systems during electrical power outages.

Policies & Procedures:

The site maintenance person is responsible for monitoring and maintaining a log of the programmed weekly test to ensure the continuous provision of power to the development.

Annually, the FRHA electrician along with their independent contractor, currently **RALCO ELECTRIC**, will perform a general inspection.

Any problems identified by the electrician during the inspection are to be reported to the Facilities Management Department.

Reports:

Inspection Report delivered to the Facilities Management Department.

FALL RIVER HOUSING AUTHORITY

Electrical System Inspection Procedure

Objective:

To ensure the continuous provision of electricity to all Federal and State sites.

Policies & Procedures:

The electricians are responsible for performing all tasks necessary to ensure the continuous provision of electricity to the development.

Annually, the electricians will perform a general inspection of the electrical system including (but not necessarily limited to):

- A.** Pulling the main circuitry boards
- B.** Checking all circuit breakers and circuit breaker boxes
- C.** Checking all main feeders
- D.** Tightening all lugs

Any problem identified by the electrician during the inspection are to be reported to the Facilities Management Department.

Reports:

Completed Work Order.

FALL RIVER HOUSING AUTHORITY
Back Flow Prevention Inspection Procedure

Objective:

To prevent water from flowing back into the water supply.

Policies & Procedures:

1. Annually, the local water & sewer department will perform a back flow inspection.
2. All repairs or replacement of the back flow valves will be made by a licensed Back Flow Technician.

Reports:

The local water & sewer department will provide a copy of the inspection report.

FALL RIVER HOUSING AUTHORITY

Roof Inspection and Service Procedure

Objective:

To identify necessary maintenance, repair and replacement of building roofs to minimize damage to facilities resulting from faulty roofing.

Policies & Procedures:

At least quarterly, the Facilities Maintenance Manager/Working Leader will inspect the flat roofs for:

- A.** Clogged drains and water standing on the roof;
- B.** Debris requiring removal;
- C.** Problems with exhaust fans;
- D.** Signs of flashing discrepancies;

Periodically these inspections should be made while it is raining.

Reports:

Quarterly "Building and Grounds Inspection" reports to be submitted to the Facilities Management Department.

FALL RIVER HOUSING AUTHORITY

Fire Extinguisher Policy and Procedure

Objective:

To ensure that all fire extinguishers are in proper working order and maintained in accordance with applicable codes.

Policy & Procedure:

1. Routinely the Facilities Maintenance Manager/Working Leader is responsible for checking that all fire extinguishers are in their proper location and that the seal is unbroken and the inspection tags are in place. Any exception should be noted on the "Building & Grounds Inspection" report and brought to the attention of the Director of Building and Grounds.
2. Annually, all fire extinguishers are inspected by an independent contractor, currently **FIRE PRO**. Inspections are noted by the contractor on the inspection tag attached to each unit.
3. At least every five (5) years, each unit must be pressure tested by an independent contractor.

Reporting:

1. The Facilities Maintenance Manager/Working Leader is responsible for reporting any missing or damaged fire extinguishers on the "Building & Grounds Inspection" report.
2. Annual inspections will be noted on the inspection tag attached to each extinguisher by the contractor.

FALL RIVER HOUSING AUTHORITY

Fire Alarm System Inspection and Service Procedure

Objective:

To ensure that the fire alarm system is operating properly and is maintained in accordance with applicable ordinances and codes.

Policies & Procedures:

1. Fire Alarm System Inspection and Servicing is conducted by an independent licensed contractor, currently **RUSTIC FIRE PROTECTION**, who will be responsible for inspecting and servicing each alarm system at least every three months.
2. At least annually the contractor will test each device related to the system to ensure it is functioning properly. Each pull station, smoke detector and heat detector will be tested. It is typical that 25% of these devices will be tested each quarter as the contractor perform his/her quarterly inspection and servicing.

Reporting:

The independent contractor submits copies of the "Quarterly Inspection Report" to both the Facilities Management Department and the local Fire Department.

FALL RIVER HOUSING AUTHORITY
Sprinkler System Inspection and Service Procedure

Objective:

To ensure the continuous, efficient operation of the sprinkler system.

Policies & Procedures:

1. Annually, site management staff conduct apartment inspections, and all sprinkler heads should be visually inspected as part of the inspection. Any appearance of a deficiency should be reported following the proper work order procedure.
2. Sprinkler systems require servicing and inspection by an independent licensed sprinkler system company. The servicing process should include, but not limited to, the following:
 - a. Flow testing to insure that the fire alarm will go off if the sprinkler system is triggered.
 - b. Sprinkler pump testing for fire pump and/or jockey pump. (The contractor may subcontract this testing)
3. Sprinkler System Inspections are tested quarterly by FRHA independent contractor currently, **RUSTIC FIRE PROTECTION.**

Reporting:

Independent Contracting Reports are generated during quarterly inspections with copies to the Facilities Management Department as well as the local Fire Department.

FALL RIVER HOUSING AUTHORITY

Smoke Detector and Carbon Monoxide Inspection Procedure

Objective:

To ensure that all smoke detectors and carbon monoxide detectors are operable.

Policies & Procedures:

1. Routinely, all maintenance staff are instructed to have (batteries, extra devices) on their person when dispatched to any type of work order request inside a residential unit. Should it be discovered that any of these devices is inoperable it should be repaired/replaced at that time.
2. Annually, site management staff conducts apartment inspections and both devices should be tested as part of the inspection, any failures should be reported following the proper work order procedure.
3. Common area devices are tested quarterly by the FRHA independent contractor currently, **RUSTIC FIRE PROTECTION**.

Reports:

Quarterly Building & Grounds inspection reports to be submitted to the Facilities Management Department. Apartment Inspection Reports are submitted to the site management office and Independent Contractor Reports are generated during quarterly inspections with copies to the Facilities Management Department as well as the local Fire Department.

THE FALL RIVER HOUSING AUTHORITY
Policies and Procedures for Apartment Inspection

Summary

Apartment Inspections are performed by the FRHA site management staff. These inspections are to be performed in accordance with Federal Standard Uniform Physical Conditions Standards (UPCS) so that all units are decent, safe, sanitary and in good condition. At least forty eight (48) hours prior to the inspection, the site management staff prepares and delivers a written notice advising the resident that the unit will be inspected. If the resident denies access or fails to respond, the inspection will be rescheduled, and a second notice is then delivered to the resident. If access is still denied, then the FRHA staff will follow legal lease procedure that authorizes FRHA staff to enter the unit and complete the inspection. These procedures are performed at all Federal and State Site Properties.

Once in the unit, the staff person will conduct housekeeping and UPCS inspection, documenting any sanitary code violation, damage to the unit, and needed repair on the inspection form. Upon completion of the inspection, the staff person may if possible, have the resident sign the inspection form and provide a copy. The staff person then returns the inspection reports to the office in order to generate necessary work orders to make all necessary repairs. In the event that a repair is an emergency, the site staff contacts the Maintenance Department/Work order Clerk to report the emergency repair.

FALL RIVER HOUSING AUTHORITY

Policies and Procedures for Apartment Inspections

Functional Overview

Each occupied residential unit under the management of the Fall River Housing Authority (FRHA) must be inspected at least annually to ensure that the unit meets the Standard of the State Sanitary Code and FEDERAL STANDARD HUD UPCS standards as well as to identify any necessary maintenance or property damages caused by the residents or routine wear and tear. Additionally, the apartment inspection provides development staff with the opportunity to perform a housekeeping inspection to ensure that the resident is maintaining the unit in accordance with the standards defined in the lease. As landlord, the FRHA is responsible for code compliance regardless of the cause (i.e. resident induced violation). The inspection provides FRHA staff with the opportunity to evaluate firsthand the resident's compliance with the terms of the lease. A copy of the form to be used in the inspection is attached hereto as an appendix to this plan.

INTRODUCTION

The Fall River Housing Authority administers over 2300 units of family, elderly and disabled affordable housing at twenty six (26) locations. It is committed to maintaining warm, dry, safe and clean residential units beyond the minimum standard.

The maintenance plan which follows has four essential components: Apartment Inspections, System Inspections, Work Order Processing and Preventative Maintenance. The Fall River Housing Authority recognizes that the performance of these tasks is essential if the FRHA is to reach their stated objective.

In furtherance of its objective the Authority shall use the FEDERAL STANDARD HUD UPCS inspection standard in performing all of the inspections performed upon its properties.

FALL RIVER HOUSING AUTHORITY

MAINTENANCE PLAN

TABLE OF CONTENTS

<u>Introduction</u>	<u>3</u>
<u>Policies & Procedures for Apartment Inspection</u>	<u>4</u>
<u>Smoke and Carbon Monoxide Detector Inspection</u>	<u>6</u>
<u>Sprinkler System Inspection and Service Procedure</u>	<u>7</u>
<u>Fire Alarm System Inspection and Service Procedure</u>	<u>8</u>
<u>Fire Extinguisher Inspection and Service Procedure</u>	<u>9</u>
<u>Roof Inspection and Service Procedure</u>	<u>10</u>
<u>Back Flow Prevention Inspection Procedure</u>	<u>11</u>
<u>Electrical System Inspection and Procedure</u>	<u>12</u>
<u>Emergency Generator Inspection and Service Procedure w/Report</u>	<u>13</u>
<u>Elevator Inspection and Service Procedure</u>	<u>14</u>
<u>Heating System Inspection and Service Procedure</u>	<u>15</u>
<u>Small Equipment Maintenance Procedure</u>	<u>16</u>
<u>Vehicle Fleet Service Procedure</u>	<u>17</u>
<u>Work Order Processing</u>	<u>18</u>
<u>After Hours Work Order Processing</u>	<u>19</u>
<u>Emergency Response Service</u>	<u>21</u>
<u>Preventative Maintenance Plan</u>	<u>22</u>
<u>Mission Statement</u>	<u>23</u>
<u>Deferred Maintenance Plan</u>	<u>24</u>
<u>Appendix (Apartment Inspection and Building & Grounds Inspection Form)</u>	

FALL RIVER HOUSING AUTHORITY

MAINTENANCE PLAN

Prepared: October 2018

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 3/31/2025. 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 FALL RIVER HOUSING AUTHORITY operating reserve at the end of fiscal year 2026 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 FALL RIVER 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	1,175,000.00	1,263,745.00	1,250,000.00	-1.10%	380.17
3111	Shelter Rent - Tenants - Fraud/Retroactive	0.00	0.00	0.00	0.00%	0.00
3115	Shelter Rent -Federal Section 8\MRVP One-time Leased up Rev.	0.00	0.00	0.00	0.00%	0.00
3190	Nondwelling Rentals	0.00	0.00	0.00	0.00%	0.00
3400	Administrative Fee - MRVP	0.00	0.00	0.00	0.00%	0.00
3610	Interest on Investments - Unrestricted	7,000.00	18,669.00	18,700.00	0.20%	5.69
3611	Interest on Investments - Restricted	0.00	0.00	0.00	0.00%	0.00
3690	Other Revenue	4,300.00	9,090.00	9,275.00	2.00%	2.82
3691	Other Revenue - Retained	0.00	69,757.00	104,000.00	49.10%	31.63
3692	Other Revenue - Operating Reserves	0.00	0.00	0.00	0.00%	0.00
3693	Other Revenue - Energy Net Meter	0.00	46,801.00	0.00	-100.00%	0.00
3801	Operating Subsidy - EOHLC (4001)	1,479,426.00	1,386,946.00	1,651,973.00	19.10%	502.42
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	2,665,726.00	2,795,008.00	3,033,948.00	8.50%	922.73

Consolidated Budget (400-1) for all state-aided 667 (Elderly), 200 (family), and 705 (scattered site family) developments owned by FALL RIVER 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	150,125.00	131,096.00	220,189.00	68.00%	66.97
4120	Compensated Absences	0.00	5,414.00	0.00	-100.00%	0.00
4130	Legal	0.00	225.00	0.00	-100.00%	0.00
4140	Members Compensation	15,000.00	16,580.00	17,000.00	2.50%	5.17
4150	Travel & Related Expenses	2,200.00	2,131.00	2,700.00	26.70%	0.82
4170	Accounting Services	0.00	0.00	0.00	0.00%	0.00
4171	Audit Costs	2,550.00	6,062.00	2,650.00	-56.30%	0.81
4180	Penalties & Interest	0.00	0.00	0.00	0.00%	0.00
4190	Administrative Other	231,970.00	376,571.00	291,500.00	-22.60%	88.66
4191	Tenant Organization	37,150.00	35,733.00	33,400.00	-6.50%	10.16
4100	TOTAL ADMINISTRATION	438,995.00	573,812.00	567,439.00	-1.10%	172.58
4310	Water	205,000.00	246,426.00	250,000.00	1.50%	76.03
4320	Electricity	367,000.00	375,130.00	370,300.00	-1.30%	112.62
4330	Gas	217,000.00	226,991.00	227,000.00	0.00%	69.04
4340	Fuel	0.00	0.00	0.00	0.00%	0.00
4360	Net Meter Utility Debit/Energy Conservation	0.00	93,602.00	0.00	-100.00%	0.00
4390	Other	0.00	0.00	0.00	0.00%	0.00
4391	Solar Operator Costs	0.00	70,780.00	71,000.00	0.30%	21.59
4392	Net Meter Utility Credit (Negative Amount)	0.00	-164,382.00	-175,000.00	6.50%	-53.22
4300	TOTAL UTILITIES	789,000.00	848,547.00	743,300.00	-12.40%	226.06

Consolidated Budget (400-1) for all state-aided 667 (Elderly), 200 (family), and 705 (scattered site family) developments owned by FALL RIVER HOUSING AUTHORITY						
EXPENSES						
Account Number	Account Class	2025 Approved Revenue Budget	2025 Actual Amounts Received	2026 Approved Revenue Budget	% Change from 2025 Actual to 2026 Budget	2026 Dollars Budgeted Per Unit per Month
4410	Maintenance Labor	371,366.00	403,992.00	407,979.00	1.00%	124.08
4420	Materials & Supplies	62,400.00	145,497.00	62,400.00	-57.10%	18.98
4430	Contract Costs	515,200.00	564,507.00	447,150.00	-20.80%	135.99
4510	Insurance	67,900.00	87,893.00	72,400.00	-17.60%	22.02
4520	Payment in Lieu of Taxes	14,600.00	14,670.00	14,600.00	-0.50%	4.44
4540	Employee Benefits	295,445.00	248,804.00	355,084.00	42.70%	107.99
4541	Employee Benefits - GASB 45	0.00	34,622.00	0.00	-100.00%	0.00
4542	Pension Expense - GASB 68	0.00	0.00	0.00	0.00%	0.00
4570	Collection Loss	16,750.00	93,222.00	16,750.00	-82.00%	5.09
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	394,695.00	479,211.00	458,834.00	-4.30%	139.55
4610	Extraordinary Maintenance	0.00	0.00	0.00	0.00%	0.00
4611	Equipment Purchases - Non Capitalized	0.00	1,000.00	0.00	-100.00%	0.00
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	851,758.00	0.00	-100.00%	0.00
4600	TOTAL OTHER EXPENSES	0.00	852,758.00	0.00	-100.00%	0.00
4000	TOTAL EXPENSES	2,571,656.00	3,868,324.00	2,687,102.00	-30.50%	817.25

Consolidated Budget (400-1) for all state-aided 667 (Elderly), 200 (family), and 705 (scattered site family) developments owned by FALL RIVER HOUSING AUTHORITY						
SUMMARY						
Account Number	Account Class	2025 Approved Revenue Budget	2025 Actual Amounts Received	2026 Approved Revenue Budget	% Change from 2025 Actual to 2026 Budget	2026 Dollars Budgeted Per Unit per Month
3000	TOTAL REVENUE	2,665,726.00	2,795,008.00	3,033,948.00	8.50%	922.73
4000	TOTAL EXPENSES	2,571,656.00	3,868,324.00	2,687,102.00	-30.50%	817.25
2700	NET INCOME (DEFICIT)	94,070.00	-1,073,316.00	346,846.00	-132.30%	105.49
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	94,070.00	-1,073,316.00	346,846.00	-132.30%	105.49

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

CRITERION	DESCRIPTION
CHAMP	
Paper applications	<p>Paper applications are available, received and entered into CHAMP</p> <ul style="list-style-type: none"> • No Findings: Paper applications are available; And paper applications are date and time stamped correctly; And 90% of new paper applications are entered into CHAMP within 15 calendar days of date/time stamp; And 2% or less of new paper applications are entered more than 30 days after date/time stamp • Operational Guidance: Paper applications are available; And paper applications are date and time stamped and entered correctly; And 75% - 89% of new paper applications are entered into CHAMP within 15 calendar days; And 3% - 5% of new paper applications are entered more than 30 days after date/time stamp • Corrective Action: Paper applications are not available; Or the LHA has failed to date and time stamp paper applications and/or failed to enter them correctly; Or Less than 75% of new paper applications are entered into CHAMP within 15 calendar days of date/time stamp; Or more than 5% of new paper applications are entered more than 30 days after date/time stamp
Vacancies occupied using CHAMP	<p>Vacancies are recorded correctly and occupied using CHAMP</p> <ul style="list-style-type: none"> • No Findings: All vacancies during the fiscal year are recorded in EOHLC's Housing Applications Vacancy System within 30 days; And the housed Applicant ID and Pull List ID match between EOHLC's Housing Applications Vacancy System and CHAMP for unit occupied during the fiscal year, excluding administrative transfers; And 25% or less of occupied units have data entry errors • Operational Guidance: All vacancies during the fiscal year are recorded in EOHLC's Housing Applications Vacancy System, all vacancies are not recorded within 30 days; Or the Housed Applicant ID and Pull List ID match between EOHLC's Housing Applications Vacancy System and CHAMP for units occupied during the fiscal year, excluding administrative transfers; And greater than 25% of occupied units have data entry errors • Corrective Action: All vacancies during the fiscal year are not recorded in EOHLC's Housing Applications Vacancy System; Or the Housed Applicant ID and Pull List ID do not match (or data is missing) between EOHLC's Housing Applications Vacancy System and CHAMP for units occupied during the fiscal year, excluding administrative transfers

CRITERION	DESCRIPTION
Financial	
Adjusted Net Income	<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"> • “No Findings” : 0 to 9.9% • “Operational Guidance”: 10 to 14.9% • “Corrective Action”: 15% or higher <p>Overspending Rating:</p> <ul style="list-style-type: none"> • “No Findings” : 0 to -4.9% • “Operational Guidance”: -5% to -9.9% • “Corrective Action”: -10% or below
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"> • “No Findings” :35%+ of maximum operating reserve • “Operational Guidance”: 20% to 34.9% of maximum operating reserve • “Corrective Action”: <20% of maximum operating reserve
Capital Planning	
Capital Spending	<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"> • “No Findings” = at least 80% • “Operational Guidance” = At least 50% • “Corrective Action” = Less than 50%
Health & Safety	
Health & safety violations	<p>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.</p>

CRITERION	DESCRIPTION
Facility Management – Inspection Standards and Practices	
100% Unit Inspections	All units inspected at LHA during FY under review <ul style="list-style-type: none"> • No Findings: 100% of units inspected • Corrective Action: Less than 100% of units inspected
LHA Inspections Reports/Work Orders	Unit inspection reports create, track, and report work orders for inspection repairs, and inspection WOs completed within 30 days or add to DM/CIP <ul style="list-style-type: none"> • No Findings: All inspection work orders/lease violations are created, tracked, and reported; And non-health and safety work orders for inspection repairs/lease violations are completed within 30 days or added to DM/CIP; And health and safety work orders for inspection repairs/lease violations are addressed within 48 hours • Operational Guidance: All health and safety inspection work orders/lease violations are created, tracked, reported and completed within 48 hours; And LHA fail to create, track, or report no more than 1 or 2 (based on LHA size) non-EHS (exigent health and safety) deficiencies; Or LHA failed to complete any non-EHS work orders/lease violations appropriately • Corrective Action: Any EHS work orders/lease violations not created, tracked, reported, or completed; Or 1 of the following: LHA failed to create, track or report a) More than 1 non-EHS deficiency (small LHA); b) More than 2 non-EHS deficiencies (Medium/Large)
Accuracy of LHA Inspections	Unit inspection reports accurately reflect necessary repairs <ul style="list-style-type: none"> • No Findings: c.667 unit has less than 2 EHS deficiencies and c.200/705 unit has less than 3 EHS deficiencies • Operational Guidance: c.667 unit has 2 EHS deficiencies or c.200/705 has 3 EHS deficiencies • Corrective Action: c.667 has equal to or greater than 3 EHS deficiencies or c.200/705 unit has equal to or greater than 4 EHS deficiencies
Facility Management – Preventative Maintenance Standards and Practices	
LHA Preventative Maintenance Schedule Accuracy and Implementation of Preventative Schedules	LHA preventative maintenance schedule accurately reflects all necessary work to maximize the life of LHA components <ul style="list-style-type: none"> • No Findings: c.667 unit less than 2 EHS deficiencies and c.200/705 less than 3 EHS deficiencies • Operational Guidance: c.667 2 EHS deficiencies or c.200/705 3 EHS deficiencies • Corrective Action: c.667 equal to or greater than 3 EHS deficiencies or c.200/705 equal to or greater than 4 EHS deficiencies

CRITERION	DESCRIPTION
Facility Management – Vacancy Turnover Standards and Practices	
Vacancy Turnover Work Orders	<p>Work orders created for every vacancy and completed within 30 days (or waiver requested)</p> <ul style="list-style-type: none"> • No Findings: Vacancy work orders are created, tracked and reported for every unit and reflect all work in unit; And Vacancy work orders are Maintenance Ready in <=30 days for c.667 units or <=45 days for c.200/705 units or have approved waiver • Operational Guidance: Vacancy work orders are created, tracked and reported for every unit; And work orders do not reflect all work completed in unit; Or vacancy work orders are Maintenance Ready in 31-45 days for c.667 and 46-60 days for c.200/705 and no approved waiver • Corrective Action: Vacancy work orders are not created, tracked and reported for every unit; Or vacancy work orders are Maintenance Ready in >45 days for c.667 and >60 days for c.200/705 and have no approved waiver
Accuracy and Standard of Vacancy Turnovers	<p>Vacancy turnover work orders accurately reflect necessary repairs</p> <ul style="list-style-type: none"> • No Findings: c.667 unit less than 2 EHS deficiencies and c.200/705 less than 3 EHS deficiencies • Operational Guidance: c.667 2 EHS deficiencies or c.200/705 3 EHS deficiencies • Corrective Action: c.667 equal to or greater than 3 EHS deficiencies or c.200/705 equal to or greater than 4 EHS deficiencies
Work Order Types and Systems	
Emergency Work Orders	<p>All emergency work orders are created, tracked, reported and completed within 48 hours</p> <ul style="list-style-type: none"> • No Findings: All emergency work orders under review are created, tracked, reported and completed within 48 hours • Operational Guidance: All emergency work orders completed within 48 hours; Less than 100% but greater than or equal to 80% of work orders under review are correctly created, tracked and reported administratively • Corrective Action: Not all emergency work orders are completed within 48 hours; Or less than 80% of work orders under review are correctly created, tracked and reported administratively
CRITERION	DESCRIPTION
Requested Work Orders	<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"> • No Findings: All requested work orders under review are created, tracked, and reported; All work is complete within 14 days or added to DM/CIP • Operational Guidance: All requested work orders completed within 14 days or added to DM/CIP; And less than 100% of work orders under review are correctly created, tracked and reported • Corrective Action: Not all requested work orders are completed within 14 days or added to DM/CIP

Policies

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

Policy	Last Ratified by Board Vote	Notes
*Capitalization Policy	4/1/2016	
*Fair Housing Marketing Plan	1/24/2022	
*Grievance Policy	4/1/2018	
*Language Access Plan	1/24/2022	
*Personnel Policy	1/14/2002	
*Procurement Policy	12/12/2016	
*Reasonable Accommodations Policy	1/24/2022	
*Rent Collection Policy	4/1/2018	

* Starred policies are required by EOHLA. 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 EOHLA.

Waivers

FALL RIVER HOUSING AUTHORITY has received the following waivers from EOHLIC’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 EOHLIC	Date Expired
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*The list of waivers has been provided by the LHA and has not been verified by EOHLIC.

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 EOHLC for each year.

Capital Funds: Funds provided by EOHLC 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 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 EOHLC conducts its review of the LHA's CIP in CIMS. For the Annual Plan CIMS imports data from other EOHLC 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 EOHLC'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 EOHLC.

EOHLC: Massachusetts Executive Office of Housing and Livable Communities

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 Voucher Program'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 EOHLC and the LHA to take a deep dive into the data, lift up best practices, and work together towards improving operations voucher Program.

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.

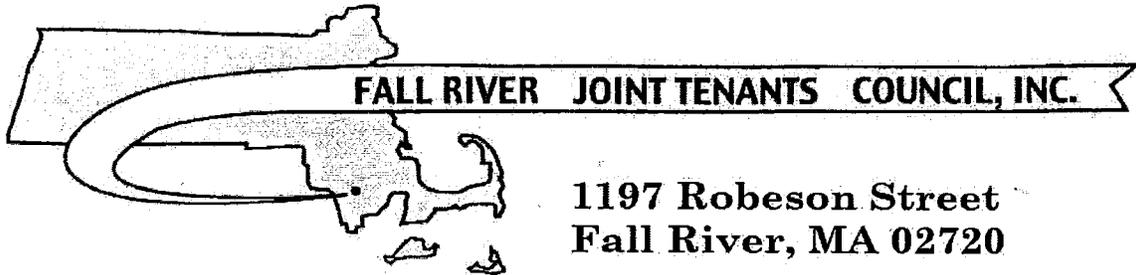
Special Awards: In addition to allocations to each LHA, EOHLC has created limited set aside funds to provide for extreme emergency or code compliance needs which are beyond the capacity of an LHA's current FF balance.

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 EOHLC.

Attachments

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

- Performance Management Review
- Cover sheet for tenant satisfaction surveys
- Public Comments
- LTO Letter



**1197 Robeson Street
Fall River, MA 02720**

January 7, 2026

Kevin Sbardella, Executive Director
Fall River Housing Authority
85 Morgan Street
Fall River, MA 02721

RE: 2026/2027 Agency Plan/Annual Plan

Dear Mr. Sbardella:

This will serve to advise that the Fall River Joint Tenants Council, Inc., (FRJTC) Resident Advisory Board (RAB) attended and participated in the three (3) official RAB meetings relative to the submission of the Fall River Housing Authority's 2026/2027 Agency Plan/Annual Plan, as well as the Public Hearing, which was conducted on January 6, 2026.

The Resident Advisory Board (RAB) was included in all discussions with regard to any changes to the Plan, and we are in agreement with all aspects of the submission.

Very truly yours,



Edward Gagnon, Executive Director
Fall River Joint Tenants Council, Inc.

EG:mjg

*Fall River Housing Authority
Annual Plan Hearing*

We had our Annual plan Hearing on January 6, 2026. There were no public comments at that time.

In addition we have signed LTO letters also uploaded.

Kevin Sbardella
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.

FALL RIVER HOUSING AUTHORITY

Performance Management Review (PMR) Report

Fiscal Year End 3/31/2024

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

Executive Office of Housing and Livable Communities (EOHLC)

PMR Desk Audit Ratings Summary **Official Published PMR Record**

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

Housing Authority	FALL RIVER HOUSING AUTHORITY
Fiscal Year Ending	Mar 2024
Housing Management Specialist	Mary Farrell
Facilities Management Specialist	Bob Arsenault

Criteria	Score/Rating			
	Management			
	c.667	c.705	c.200	Cumulative
Occupancy Rate	No Findings	No Findings	No Findings	No Findings
	c.667	c.705	c.200	Cumulative
Tenant Accounts Receivable (TAR)	Corrective Action	Corrective Action	Corrective Action	Corrective Action
Board Member Training	Corrective Action			
Certifications and Reporting Submissions	No Findings			
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	FALL RIVER HOUSING AUTHORITY
FYE	Mar 2024
HMS Name	Mary Farrell
FMS Name	Bob Arsenault

Criteria	Rating
Staff Certification and Training	No Findings

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

LHA Name	FALL RIVER HOUSING AUTHORITY
FYE	Mar 2024
HMS Name	Mary Farrell
FMS Name	Bob Arsenault

CFA Submission (Planning Year)

Rating: Not Applicable

Recommendations: 1. No Recommendations

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

LHA Name	FALL RIVER HOUSING AUTHORITY
FYE	Mar 2024
HMS Name	Mary Farrell
FMS Name	Bob Arsenault

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. 4th Quarter reporting was submitted late and couldn't be evaluated.

Board Member Training

Rating: Corrective Action

1. Ensure you update the board attendance application with the most recent board members, and their term dates.
2. Ensure each board member has a unique email for the board member training.
3. Provide computer guidance as needed to help board members complete the training.
4. Please refer to PHN 2018-08. Board trainings to be done every two years or upon reelection/reappointment.

Certifications and Reporting Submissions

Rating: No Findings

1. No Recommendations

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. 4th Quarter reporting was submitted late and couldn't be evaluated.

Operating Reserve

Rating: Corrective Action

1. 4th Quarter reporting was submitted late and couldn't be evaluated.

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

LHA Name	FALL RIVER HOUSING AUTHORITY
FYE	Mar 2024
HMS Name	Mary Farrell
FMS Name	Bob Arsenault

CHAMP Criteria 1a

Rating: No Findings

Recommendations: 1. No Recommendations

CHAMP Criteria 1b

Rating: No Findings

Recommendations: 1. No Recommendations

CHAMP Criteria 1c

Rating: No Findings

Recommendations: 1. 100% of applications entered into the system in less than 15 days is an outstanding rating.

CHAMP Criteria 2a

Rating: Operational Guidance

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

CHAMP Criteria 2b

Rating: No Findings

Recommendations: 1. No Recommendations

CHAMP Criteria 3a

Rating: No Findings

Recommendations: 1. No Recommendations

CHAMP Criteria 3b (Planning Year)

Rating: Not Applicable

Recommendations: 1. No Recommendations

CHAMP Criteria 3c (Planning Year)

Rating: Not Applicable

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	FALL RIVER HOUSING AUTHORITY
FYE	Mar 2024
HMS Name	Mary Farrell
FMS Name	Bob Arsenault

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

Rating: No Findings

Recommendations: 1. No Recommendations

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

Rating: No Findings

Recommendations: 1. No Recommendations

Criteria 3: Unit Inspection Reports accurately reflect necessary repairs

Rating: 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. No Recommendations

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

Rating: No Findings

Recommendations: 1. No Recommendations

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

Rating: No Findings

Recommendations: 1. No Recommendations

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

Rating: No Findings

Recommendations: 1. No Recommendations

Health & Safety Deficiencies

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