QUINCY 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 EOHLC.

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

The QUINCY 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
667-01	Elderly	DAVID J. CROWLEY COURT	12	1958	44
667-02	Elderly	LOUIE GEORGE	11	1964	75
667-03	Elderly	SAWYER TOWERS	1	1970	153
200-01	Family	SNUG HARBOR	99	1949	396
667-04	Elderly	TOBIN TOWERS	1	1975	200
705-02	Family	WESTACRES	9	1950	36
	Family	Family units in smaller developments	2		3
	Other	Other Special Occupancy units	4		13
Total			139		920

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.

QUINCY HOUSING AUTHORITY manages 26 MRVP vouchers.

Federally Assisted Developments

QUINCY HOUSING AUTHORITY also manages Federally-assisted public housing developments and/or federal rental subsidy vouchers serving 2222 households.

LHA Central Office

QUINCY HOUSING AUTHORITY
80 Clay Street Quincy, MA 02170

James Marathas, Executive Director
Phone: 617-847-4350
Email: jmarathas@quincyha.com

LHA Board of Commissioners

	Role	Category	From	To
Brian Clifford	Member		02/06/2023	02/07/2028
John DeCarli	Member		11/06/2023	02/02/2026
Josephine Shea	Member		11/14/2024	03/18/2029
Michael Flaherty	Chair		02/07/2022	02/01/2027
Timothy Baker	Member		01/22/2024	02/02/2026

Plan History

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

REQUIREMENT		DATE COMPLETED
A.	Advertise the public hearing on the LHA website.	5/22/2026
B.	Advertise the public hearing in public postings.	5/22/2026
C.	Notify all LTOs or RAB (if there is one) of the hearing and provide access to the Proposed Annual Plan.	5/22/2026
D.	Post draft AP for tenant and public viewing.	5/14/2026
E.	Hold quarterly meeting with LTO or RAB to review the draft AP. (Must occur before the LHA Board reviews the Annual Plan.)	6/8/2026
F.	Annual Plan Hearing. Hosted by the LHA Board, with a quorum of members present. (For Boston, the Administrator will host the hearing.)	7/15/2026
G.	Executive Director presents the Annual Plan to the Board.	7/15/2026
H.	Board votes to approve the AP. (For Boston Housing Authority, the Administrator approves and submits the AP.)	7/15/2026

Certification

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

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

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

Date of certification: 7/28/2026

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 (CIP) Description

What Is the Capital Improvement Plan?

The Capital Improvement Plan (CIP) is a five-year plan that outlines major repairs and improvements to housing authority properties. It describes each project's scope, estimated cost, and timeline, while reflecting the Local Housing Authority's prioritization of its most critical needs, particularly those related to resident health and safety. The plan also identifies how projects may be funded and when they are anticipated to take place, based on the Massachusetts Executive Office of Housing and Livable Communities (EOHLC) fiscal year (July 1 through June 30).

How Projects Are Funded Each Year

Each year, every Local Housing Authority (LHA) receives a Formula Funding Award from EOHLC. This annual award provides the primary source of funding for new projects included in the CIP. While funding levels may vary, it is generally reasonable to anticipate that similar award amounts will be available over the next two years, which helps inform project planning and scheduling. LHAs may also apply for additional "special awards" from EOHLC for specific projects that meet certain criteria, such as emergency repairs, regulatory compliance, or energy and water conservation improvements.

Why Plans and Costs May Change

The CIP is a planning document and must be submitted to EOHLC for review and approval. While the plan reflects current cost estimates, project budgets often increase between the time they are planned and when construction begins. As a result, available funding may not go as far as originally anticipated, and some projects may need to be adjusted, delayed, or completed in phases.

Why Project Schedules Can Shift

Because the CIP is updated each year, project schedules and priorities may change over time. In particular, previously unidentified conditions or urgent repair needs may arise after the plan is developed; due to their impact on health, safety, or building integrity, these issues may take precedence over projects that were previously scheduled. When this occurs, the plan may be updated through CIP Revision.

To better understand how a plan has changed—including which projects were advanced, delayed, or added—it is helpful to compare the current year's CIP with the prior year's CIP. This comparison can show how EOHLC funding decisions and plan revisions have affected project timing and priorities.

Other Funding Sources

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. However, not all of these funding sources are available every year, or in all communities.

The CIP includes the following parts:

1. A list of existing projects approved in last year's CIP Plan or added to the plan through CIP Revision during the year.
2. A list of planned capital projects showing spending per fiscal year.
3. 'Narrative Questions' with a variety of additional information.

Active and Proposed Projects with Projected Spending by Fiscal Year

Active Projects			
Project #	**Project Title**	**Development**	**Total Development Cost**
243268	ARPA FF: Elevator Upgrades	SAWYER TOWERS	$1,869,015.05
243300	AIP: 667 Routine Turnovers		$94,400.00
243304	Force Account - Crawl Space	LOUIE GEORGE	$7,500.00
243208	SUST: FF: Exterior Entrance Door Replacement	LOUIE GEORGE	$578,620.05
243231	Balcony door replacement and renovations	LOUIE GEORGE	$300,816.71
243247	Ceiling Overlay	SNUG HARBOR	$362,500.00
243249	Security System 15 Bicknell St.	SNUG HARBOR	$101,961.25
243255	Intercom System Replacement at the 667-3 and 667-4	SAWYER TOWERS	$489,835.00
243257	Building Envelope Study 667-3 & 667-4	SAWYER TOWERS	$201,832.50
243262	Sliding Glass Door Replacement	TOBIN TOWERS	$0.00
243266	Bathtub Shower Fixture Replacement		$13,345.00
243267	Electrical Upgrade-Force Account	WESTACRES	$266,229.44
243269	Compactor Replacement	TOBIN TOWERS	$59,816.44
243271	ARPA Targeted Federal Pacific Electrical Systems Replacement	TOBIN TOWERS	$781,529.95
243274	Replace Restroom Flooring - Force Account	SAWYER TOWERS	$16,698.00
243276	Office Renovations - Force Account	TOBIN TOWERS	$20,873.00
243282	Renovate Off-Line Units - Force Account	SNUG HARBOR	$0.00
243283	Emergency Generator	DAVID J. CROWLEY COURT	$0.00
243284	HVAC Improvements - Force Account	TOBIN TOWERS	$13,915.00
243285	Roof Replacement	WESTACRES	$675,991.28
243286	Window Replacement	SAWYER TOWERS	$0.00
243287	Paint Exterior Balcony Railings -Force Account	TOBIN TOWERS	$356,537.24
243288	Exterior unit door replacement		$519,075.75
243289	Emergency Generator Installation	SNUG HARBOR	$75,776.00
243290	Snug Harbor Heating System Replacement-LEAN-Force Account	SNUG HARBOR	$775,234.51
243291	Force Account - Extensive Unit Rehabilitation	WESTACRES	$0.00
243292	Window Replacement	DAVID J. CROWLEY COURT	$0.00
243293	Heating Boiler Replacement	75 South Street	$0.00

Active Projects			
243294	Force Account - Sewer Piping Phase II	SNUG HARBOR	$0.00
243295	Paint Basement Doors and Replace Hardware	SNUG HARBOR	$75,625.00
243296	Parking Lots Repavement	SNUG HARBOR	$0.00
243297	Roof Replacement	SNUG HARBOR	$430,853.54
243298	Community Room Kitchen Renovations - Force Account	SAWYER TOWERS	$19,250.00
243299	SUST Resiliency Study	SNUG HARBOR	$20,000.00
243302	DMH Set Aside Kitchens and Baths-Force Acct	75 South Street	$133,429.00
243303	HVAC Improvements	SNUG HARBOR	$18,906.00
243305	Flooring Replacement	LOUIE GEORGE	$92,641.00
243306	Fire Alarm Replacement	LOUIE GEORGE	$372,307.87
243307	Replace site benches	LOUIE GEORGE	$15,125.00
243308	Hallway Painting - Force Account	SAWYER TOWERS	$57,500.00
243309	Benches and Picnic Tables	SAWYER TOWERS	$16,638.00
243310	EMG: Admin. Acoustical Ceiling replacement	TOBIN TOWERS	$17,738.00
243311	Stairwell Painting	TOBIN TOWERS	$63,265.55
243313	Snug Harbor Trail	SNUG HARBOR	$350,053.00
243314	Sawyer Towers 667-3 Tower Roof Replacement	SAWYER TOWERS	$1,000,052.50
Total			$10,264,886.63

Proposed Projects			
FY2027		**Available Formula Funding:**	**$1,422,210.73**
Project Title	**Development**	**Total Development Cost**	**Special Award(s) Requested**
Force Account - Interior Painting	SNUG HARBOR	$19,000.00	
Flooring Replacement	DAVID J. CROWLEY COURT	$15,881.00	
Basement Door Replacement	DAVID J. CROWLEY COURT	$30,250.00	
Fire Alarm Replacement	DAVID J. CROWLEY COURT	$408,665.00	
Exterior Door Replacement-Maint. Facility	SNUG HARBOR	$78,650.00	
Ceiling Replacement-705-2 Dev Wide	WESTACRES	$446,054.40	
Total		$998,500.40	

Proposed Projects		
FY2028	**Anticipated Formula Funding:**	**$1,422,210.73**
Project Title	**Development**	**Total Development Cost**
Bathroom Renovations	WESTACRES	$582,312.00
Basement Window Replacement	SNUG HARBOR	$189,062.00
667-4 Unit Window Replacement	TOBIN TOWERS	$453,750.00
667-4 Ground Level Window Replacement	TOBIN TOWERS	$189,862.00
Total		$1,414,986.00

Proposed Projects		
FY2029	**Anticipated Formula Funding:**	**$1,422,210.73**
Project Title	**Development**	**Total Development Cost**
Kitchen Renovations	SAWYER TOWERS	$260,906.00
Flooring Replacement	SNUG HARBOR	$83,944.00
Tool Shed	SAWYER TOWERS	$11,344.00
Bathroom modernization	LOUIE GEORGE	$1,134,375.00
Total		$1,490,569.00

Years 4 and 5 (reflect estimated annual planning amounts)		
FY2030 and FY2031		
Project Title	**Development**	**Total Development Cost**
Bathroom Renovations	SNUG HARBOR	$3,630,000.00
Dumpster Replacements	TOBIN TOWERS	$0.00
Replace Flood Grates	LOUIE GEORGE	$0.00
EMRG Boiler Replacement	215 Safford Street	$2,203.00
EMRG Boiler Replacement	215 Safford Street	$8,555.00
Total		$3,640,758.00

The 'Narrative Questions' with Additional Information

1. Project Closeout

Have you reviewed in progress projects, contacted your PM to close out old projects, and recirculated unused funds? Please explain why or why not.

Answer: No

Explanation: Several Projects are complete and are awaiting final invoicing and Admin. We ae in the process of cross checking all projects and closing out schedules and reporting to EOHLC.

2. Request for Additional Funding

Request additional funding from EOHLC by going to the project's detail page and adding a comment that includes the funding type and requested amount. Upload any relevant attachments at the bottom of this form. Do not include requests already approved in your latest CIP.

3. Overall Goals of the Capital Improvement Plan

What do you plan to achieve with this year's CIP plan and how do the projects you've selected support this goal?

Explanation: We have chosen what we feel to be the most pressing and critical projects at this point in time. Our goal is to take care of projects which negatively impact the operating side of the budget.

4. Changes from the Previous CIP

Aside from completing projects that were listed in your previous CIP and adding new projects in the new planning year(s), in what way does your new CIP differ from your previous CIP?

Explanation: It adds new projects that are more important than previous. They are West Acres Ceiling replacement, Maintenance Facility Door replacement, Crowley Court Fire Alarm System replacement and Basement door replacement. It defers the Window Replacement Projects at Tobin Towers and Sawyer Towers as those are awaiting study results and further cost estimating.

5. Requirements from previous CIP approval

A. Approval Requirements

Did your previous CIP Approval Letter include conditions to be satisfied when implementing the CIP projects or conditions to be included in your new CIP?

Answer: No

6. Project Priorities

Does your CIP only include high priority capital projects (Priority 1 and 2 projects)? If no, explain your rationale for including lower priority projects.

Answer: Yes

7. High Priority Deficiencies

Are there any high priority capital deficiencies (priority 1 or 2 projects) in your CPS Backlog that you could not fit in your year 1 or 2 CIP plan? If yes, provide an explanation and the plan to address the deficiencies. Make sure to go through the CPS Backlog and update priorities when necessary.

Answer: Yes

Explanation: QHA continues to maintain safe, decent, and sanitary conditions on these projects and work with EOHLC to move them forward. Additionally we address some of these conditions upon Vacancy Unit Turnovers.

8. Accessibility

Are you aware of any accessibility deficiencies in your portfolio (units, common areas, and sites)? If yes, describe the deficiencies and list the projects in this CIP that will address them.

Answer: No

9. Special Needs Development

A. DMH/DDS Developments

LHAs must meet with each service provider on an annual basis to discuss the physical condition and necessary repairs of each of the DDS/DMH developments (167 or 689). Does your LHA have one or more DDS/DMH developments? If yes, provide details from the service provider input.

Answer: Yes

B. DMH/DDS Projects

Does your plan include projects for the DMH/DDS developments recommended by this service provider? If no, provide an explanation. Include input from the service provider staff for expanding the DMH/DDS set aside.

Service Provider Input Completion Date: 05/20/2025

Answer: No

Explanation: We have one current project for one of our 689 Developments but there are no other pressing 689 needs at this time. We continue to work with DMH, DDS and their providers to identify deficiencies.

10. Sustainability Program

Are you requesting Sustainability Funding for any of your projects?

Answer: No

11. Solar Initiatives

Does your current CIP contain roof replacement projects?

Answer: No

12. Resilience

Are any of your developments flagged for weather vulnerabilities in CPS? For example, sea-level rise/storm surge, rainfall flooding, and extreme heat.

Answer: Yes

If yes, do the projects in this CIP planned at these developments incorporate resilient design elements into the initial design plans and costs? If no, please explain.

Answer: Yes

13. Fossil Fuels

PHN 2024-11 stipulates that EOHLC Capital Funds cannot be used to install new fossil fuel-fired equipment, barring a few exceptions. This includes natural gas, propane, and heating oil.

Will fossil fuel-fired equipment be installed as a part of any project in this CIP?

Answer: No

14. Vacant Units

Please list the projects in this CIP submission that are tied to reoccupying vacant units. If there are none, write none.

Explanation: None

15. EOHLC/RCAT Assistance

Has EOHLC or RCAT staff provided you with assistance developing this CIP? If yes, who were the EOHLC or RCAT staff involved?

Answer: Yes

Explanation: Guided by Beth Thompson from Cybersense.

16. Certification Statement

I certify that this is the complete and accurate list of projects that I will be submitting to the Board for approval as part of the Annual Plan process.

If there are any additions, deletions, or modifications to this list of projects resulting from the Board or LTO/public meeting, I will promptly notify my EOHLC Project Manager and RCAT Project Manager and make the necessary changes.

Answer: Yes

17. Other Comments

Comments:

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	617-773-6863	24 hr Maintenance line answering service
Call LHA at Phone Number	617-847-4350	M-F 8:30AM - 4:30PM
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 QUINCY 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	617-773-6863	24 hr Maintenance line answering service
Call Housing Authority Office		
Submit Online at Website		
Email to Following Email		
Other		

Work Order Management

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

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

C. Our work order process includes the following steps:

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

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

Maintenance Plan Narrative

Following are QUINCY 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?

See attachment at end of the Annual Plan.

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

See attachment at end of the Annual Plan.

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

See attachment at end of the Annual Plan.

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	$2,790,583.00	$93,000.00
Last Fiscal Year Actual Spending	$2,735,024.00	$4,820.00
Current Fiscal Year Budget	$2,999,333.00	$335,000.00

E. Unit Turnover Summary

# Turnovers Last Fiscal Year	53
Average time from date vacated to make unit "Maintenance Ready"	28 days
Average time from date vacated to lease up of unit	53 days

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

Attachments

These items have been prepared by the QUINCY 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.

QUINCY HOUSING AUTHORITY

80 CLAY STREET
QUINCY, MASSACHUSETTS 02170-2799

James N. Marathas
Executive Director
Telephone: (617) 847-4350
Fax: (617) 770-2876

January Preventative Maintenance Task

1. Monitor and issue on-going snow removal work orders.
2. Hot air furnace / Boiler winter PM.
3. Oil circulator pumps.
4. Clean dryer vents.
5. Vehicle Inspection:
    a. Check all fluid levels: crank case, transmission, etc.
    b. Check antifreeze, radiator rust inhibiter, and thermostat.
    c. Check windshield washer fluid.
    d. Check belts and hoses.
    e. Check plugs, wiring, battery, clean and grease terminals.
    f. Clean out air cleaner.
    g. Check wheel alignment and tire balance (signs of uneven wear).
    h. Check heater and defroster.
    i. Check wiper blades for wear.
    j. Check underbody for corrosion and hose off.
    k. Change engine oil in all vehicles. (1^{st} quarter)
6. Check Smoke and Carbon Monoxide detectors during annual inspections.
7. Clean/disinfect compactor and trash chutes.
8. Inventory tools, equipment, refrigerators and stoves in stock.
9. Inventory of supplies and small parts.
10. Unit inspections – schedule so as to complete 100% each year.

a) It is recommended that inspections be completed by an administrative staff member or the Executive Director and a maintenance staff employee. This will ensure that the executive director and administrative staff become aware of the property conditions and any lease enforcement issues.

b) It is recommended that you inspect a manageable number of units each month which allows for all maintenance deficiencies to be completed within the DHCD Property Maintenance Guidelines 14-day period.

11. Lease enforcement: Snow removal from front and rear egress.

12. Keep all chimneys, exhaust and intake vents free of snow throughout the winter season and keep dryer exhaust vents free of snow throughout the winter season.

a) Blocked chimneys, exhaust vents and intake vents could result in carbon monoxide poisoning and can affect the performance of the furnace.

QUINCY HOUSING AUTHORITY

80 CLAY STREET
QUINCY, MASSACHUSETTS 02170-2799

James N. Marathas
Executive Director
Telephone: (617) 847-4350
Fax: (617) 770-2876

February Preventative Maintenance Task

1. Monitor and issue on-going snow removal work orders.
2. A/C, heat and air handler filter change.
3. Clean sanitary systems, lubricate valves and pumps.
4. Clean and lubricate trash chutes and doors
5. Strip, wax and buff VAT and linoleum flooring.
6. Vehicle Inspection:
    a. Check all fluid levels: crank case, transmission, etc.
    b. Check antifreeze, radiator rust inhibiter, and thermostat.
    c. Check windshield washer fluid.
    d. Check belts and hoses.
    e. Check plugs, wiring, battery, clean and grease terminals.
    f. Clean out air cleaner.
    g. Check wheel alignment and tire balance (signs of uneven wear).
    h. Check heater and defroster.
    i. Check wiper blades for wear.
    j. Check underbody for corrosion and hose off.
7. Check Smoke and Carbon Monoxide detectors during annual inspections.
8. Clean/disinfect compactor and trash chutes.
9. Inventory of supplies and small parts.
10. Unit inspections – schedule so as to complete 100% each year.

a. It is recommended that inspections be completed by an administrative staff member or the Executive Director and a maintenance staff employee. This will ensure that the executive director and administrative staff become aware of the property conditions and any lease enforcement issues.

b. It is recommended that you inspect a manageable number of units each month which allows for all maintenance deficiencies to be completed within the DHCD Property Maintenance Guidelines 14-day period.

11. Lease enforcement: Clear common hallways and stairs free from all obstructions. (PHN 2012-12)

a) According to the State Sanitary code 105 CMR 410.451 - No person shall obstruct any exit or passageway. The owner is responsible for maintaining free from obstruction every exit used or intended for use by occupants of more than one dwelling unit or rooming unit. The occupant shall be responsible for maintaining free from obstruction all means of exit leading from his unit and not common to the exit of any other unit.

12. Keep all chimneys, exhaust and intake vents free of snow throughout the winter season and keep dryer exhaust vents free of snow throughout the winter season.

a. Blocked chimneys, exhaust vents and intake vents could result in carbon monoxide poisoning and can affect the performance of the furnace.

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March Preventative Maintenance Task

1. Second Sunday, reset light timers and clocks for daylight saving time.
2. Monitor and issue on-going snow removal work orders.
3. Clean storage rooms and maintenance areas.
4. Touch up all common area paint.
5. Clean heater vents in all common areas.
6. Vehicle Inspection:
    a. Check all fluid levels: crank case, transmission, etc.
    b. Check antifreeze, radiator rust inhibiter, and thermostat.
    c. Check windshield washer fluid.
    d. Check belts and hoses.
    e. Check plugs, wiring, battery, clean and grease terminals.
    f. Clean out air cleaner.
    g. Check wheel alignment and tire balance (signs of uneven wear).
    h. Check heater and defroster.
    i. Check wiper blades for wear.
    j. Check underbody for corrosion and hose off.
7. Check Smoke and Carbon Monoxide detectors during annual inspections.
8. Clean/disinfect compactor and trash chutes.
9. Unit inspections – Schedule so as to complete 100% each year.
    - It is recommended that inspections be completed by an administrative staff member or the Executive Director and a maintenance staff employee. This will ensure that the executive director and administrative staff become aware of the property conditions and any lease enforcement issues.

- It is recommended that you inspect a manageable number of units each month which allows for all maintenance deficiencies to be completed within the DHCD Property Maintenance Guidelines 14-day period.

9. Lease enforcement: Furniture, trash and debris free from exteriors.

10. Inventory of supplies and small parts.

11. Keep all chimneys, exhaust and intake vents free of snow throughout the winter season and keep dryer exhaust vents free of snow throughout the winter season.

    - Blocked chimneys, exhaust vents and intake vents could result in carbon monoxide poisoning and can affect the performance of the furnace.

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April Preventative Maintenance Task

1. Fire extinguisher annual recertification.
2. Inspect all entry doors.
3. Clean dryer vents, exhaust vents and roof vent motors.
4. Service lawn equipment.
5. Inspect roofs and siding.
6. Clean common area flooring and carpeting.
7. Clean/disinfect dumpsters and compactor.
8. Cleaning of parking areas, roadways, driveways, walkways and storm drains.
9. Inspect trees and trim as needed (maintain 10ft distance from buildings)
10. Vehicle Inspection:
    a. Check all fluid levels: crank case, transmission, etc.
    b. Check antifreeze, radiator rust inhibiter, and thermostat.
    c. Check windshield washer fluid.
    d. Check belts and hoses.
    e. Check plugs, wiring, battery, clean and grease terminals.
    f. Clean out air cleaner.
    g. Check wheel alignment and tire balance (signs of uneven wear).
    h. Check heater and defroster.
    i. Check wiper blades for wear.
    j. Check underbody for corrosion and hose off
11. Check Smoke and Carbon Monoxide detectors during annual inspections.
12. Inventory of supplies and small parts.

13. Unit inspections – schedule so as to complete 100% each year.

    - It is recommended that inspections be completed by an administrative staff member or the Executive Director and a maintenance staff employee. This will ensure that the executive director and administrative staff become aware of the property conditions and any lease enforcement issues.
    - It is recommended that you inspect a manageable number of units each month which allows for all maintenance deficiencies to be completed within the DHCD Property Maintenance Guidelines 14-day period.

14. Lease enforcement: Check for proper AC installation (according to policy) - See attached recommended Air Conditioner Policy.

QUINCY HOUSING AUTHORITY

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May Preventative Maintenance Task

1. Clean all manholes.
2. Emergency generator PM.
3. Clean A/C condensers.
4. Sidewalk and parking lot crack and crevice sealing and repair.
5. Weed treatment at all sites.
6. Edge and mulch all planting beds.

   <u>NOTE</u>: Please note that in accordance with 527 CMR 17, which took effect September 2012, the new application of mulch within 18 inches around combustible exteriors of buildings such as wood or vinyl, but not brick or concrete, is prohibited. (see attachment)

7. Clean/disinfect compactor and dumpsters.
8. Prune/trim all shrubs and bushes away from buildings (maintain 2 ft. clearance from all structures).
9. Fertilize lawns.
10. Vehicle Inspection:
    a. Check all fluid levels: crank case, transmission, etc.
    b. Check antifreeze, radiator rust inhibiter, and thermostat.
    c. Check windshield washer fluid.
    d. Check belts and hoses.
    e. Check plugs, wiring, battery, clean and grease terminals.
    f. Clean out air cleaner.
    g. Check wheel alignment and tire balance (signs of uneven wear).
    h. Check heater and defroster.
    i. Check wiper blades for wear.

11. Inventory of supplies and small parts.

12. Check Smoke and Carbon Monoxide detectors during annual inspections.

13. Unit inspections – schedule so as to complete 100% each year.

    - It is recommended that inspections be completed by an administrative staff member or the Executive Director and a maintenance staff employee. This will ensure that the executive director and administrative staff become aware of the property conditions and any lease enforcement issues.
    - It is recommended that you inspect a manageable number of units each month which allows for all maintenance deficiencies to be completed within the DHCD Property Maintenance Guidelines 14-day period.

14. Lease enforcement: Cooking grills and fire pits (according to policy)

    - DHCD recommends the ban of fire pits on all public housing property. There is extreme risk to life and safety with the unsupervised use of fire pits.
    - All cooking grills should be used a minimum of 10 feet from all structures.

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June Preventative Maintenance Task

1. Summer boiler shut-down and Preventative Maintenance service during non-heating season June 16th to September 14th.
2. Change A/C, heat and air handler filters.
3. Check interior emergency lighting.
4. Weed and edge all planting beds every 2 weeks (June 1st to Oct 1st)
5. Inspect site railings, walkways and stairs for potential hazards. Identify and repair as needed.
6. Edge and mulch all planting beds.

   NOTE: Please note that in accordance with 527 CMR 17, which took effect September 2012, the new application of mulch within 18 inches around combustible exteriors of buildings such as wood or vinyl, but not brick or concrete, is prohibited. (See attachment.)
7. Clean/disinfect dumpsters and compactor.
8. Check flags and replace as needed
9. Vehicle Inspection:
   a. Check all fluid levels: crank case, transmission, etc.
   b. Check antifreeze, radiator rust inhibiter and thermostat.
   c. Check windshield washer fluid.
   d. Check belts and hoses.
   e. Check plugs, wiring, battery, clean and grease terminals.
   f. Clean out air cleaner.
   g. Check wheel alignment and tire balance (signs of uneven wear).
   h. Check heater and defroster.
   i. Check wiper blades for wear.

10. Check Smoke and Carbon Monoxide detectors during annual inspections.

11. Inventory of supplies and small parts.

12. Unit inspections – schedule so as to complete 100% each year.

    - It is recommended that inspections be completed by an administrative staff member or the Executive Director and a maintenance staff employee. This will ensure that the executive director and administrative staff become aware of the property conditions and any lease enforcement issues.
    - It is recommended that you inspect a manageable number of units each month which allows for all maintenance deficiencies to be completed within the DHCD Property Maintenance Guidelines 14-day period.

13. Lease enforcement: pools, trampolines and swing-sets (according to policy)

    a. Furniture, trash and debris free from exterior.

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July Preventative Maintenance Task

1. Clean dryer vents, exhaust vents and roof vent motors.
2. Inspect gutters, downspouts and splash blocks – repair as needed.
3. Inspect common area windows (glass, seals, balances and locks).
4. Inspect and repair site fencing
5. Clean/disinfect dumpsters and compactor.
6. Vehicle Inspection:
   a. Check all fluid levels: crank case, transmission, etc.
   b. Check antifreeze, radiator rust inhibiter, and thermostat.
   c. Check windshield washer fluid.
   d. Check belts and hoses.
   e. Check plugs, wiring, battery, clean and grease terminals.
   f. Clean out air cleaner.
   g. Check wheel alignment and tire balance (signs of uneven wear).
   h. Check heater and defroster.
   i. Check wiper blades for wear.
   j. Change engine oil in all (3^{rd} quarter)
7. Inventory of supplies and small parts.
8. Check Smoke and Carbon Monoxide detectors during annual inspections.
9. Unit inspections – schedule so as to complete 100% each year.

   - It is recommended that inspections be completed by an administrative staff member or the Executive Director and a maintenance staff employee. This will ensure that the executive director and administrative staff become aware of the property conditions and any lease enforcement issues.

- It is recommended that you inspect a manageable number of units each month which allows for all maintenance deficiencies to be completed within the DHCD Property Maintenance Guidelines 14-day period.

10. Lease enforcement: Pet policy (according to pet policy)

QUINCY HOUSING AUTHORITY

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August Preventative Maintenance Task

1. Make-up Air Units Preventative Maintenance.
2. Strip, wax and buff VAT and linoleum flooring.
3. Clean/disinfect dumpsters compactor.
4. Vehicle Inspection:
   a. Check all fluid levels: crank case, transmission, etc.
   b. Check antifreeze, radiator rust inhibiter, and thermostat.
   c. Check windshield washer fluid.
   d. Check belts and hoses.
   e. Check plugs, wiring, battery, clean and grease terminals.
   f. Clean out air cleaner.
   g. Check wheel alignment and tire balance (signs of uneven wear).
   h. Check heater and defroster.
   i. Check wiper blades for wear.
5. Inventory of supplies and small parts.
6. Check Smoke and Carbon Monoxide detectors during annual inspections.
7. Lease enforcement: Common hallways and stairs free from all obstructions. (PHN 2012-12)

   - According to the State Sanitary code 105 CMR 410.451 - No person shall obstruct any exit or passageway. The owner is responsible for maintaining free from obstruction every exit used or intended for use by occupants of more than one dwelling unit or rooming unit. The occupant shall be responsible for maintaining free from obstruction all means of exit leading from his unit and not common to the exit of any other unit.

8. Unit inspections – schedule so as to complete 100% each year.
   - It is recommended that inspections be completed by an administrative staff member or the Executive Director and a maintenance staff employee. This will ensure that the executive director and administrative staff become aware of the property conditions and any lease enforcement issues.

- It is recommended that you inspect a manageable number of units each month which allows for all maintenance deficiencies to be completed within the DHCD Property Maintenance Guidelines 14-day period.

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September Preventative Maintenance Task

1. Check electrical panels in boiler rooms and all common areas.
2. Domestic hot water systems PM.
3. Clean storage rooms and maintenance areas.
4. Touch up all common area paint.
5. Clean heater vents in all common areas.
6. Clean/disinfect dumpsters and compactor.
7. Vehicle Inspection:
   a. Check all fluid levels: crank case, transmission, etc.
   b. Check antifreeze, radiator rust inhibiter, and thermostat.
   c. Check windshield washer fluid.
   d. Check belts and hoses.
   e. Check plugs, wiring, battery, clean and grease terminals.
   f. Clean out air cleaner.
   g. Check wheel alignment and tire balance (signs of uneven wear).
   h. Check heater and defroster.
   i. Check wiper blades for wear.
8. Inventory of supplies and small parts.
9. Check Smoke and Carbon Monoxide detectors during annual inspections.
10. Unit inspections – schedule so as to complete 100% each year.
    - It is recommended that inspections be completed by an administrative staff member or the Executive Director and a maintenance staff employee. This will ensure that the executive director and administrative staff become aware of the property conditions and any lease enforcement issues.

- It is recommended that you inspect a manageable number of units each month which allows for all maintenance deficiencies to be completed within the DHCD Property Maintenance Guidelines 14-day period.

11. Lease enforcement: Removal of all AC's (according to policy)

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October Preventative Maintenance Task

1. October 7th through the 13th – Fire Prevention Month: Perform PM and check all fire systems, sprinklers, fire pumps, fire extinguishers, common area egress, etc.
2. Annual sewer station PM.
3. Boiler tune-up. (Heating season is September 15th through June 15th)
4. Change A/C, heat and air handler filters.
5. Clean/disinfect dumpsters and compactor.
6. Annual cleaning of all gutters.
7. Leaf removal.
8. Prune and trim all shrubs and bushes. (maintain 2ft clearance from all structures)
9. Fertilize lawns.
10. Buy and stock ice melt for winter.
11. Clean dryer vents, exhaust vents and roof vent motors.
12. Service snow blowers.
13. Cleaning of parking areas, roadways, driveways, walkways and storm drains.
14. Clean, service and store lawn equipment.
15. Vehicle Inspection:
    a. Check all fluid levels: crank case, transmission, etc.
    b. Check antifreeze, radiator rust inhibiter, and thermostat.
    c. Check windshield washer fluid.
    d. Check belts and hoses.
    e. Check plugs, wiring, battery, clean and grease terminals.

f. Clean out air cleaner.

g. Check wheel alignment and tire balance (signs of uneven wear).

h. Check heater and defroster.

i. Check wiper blades for wear.

j. Change engine oil in all vehicles. (4^{th} quarter)

16. Inventory of supplies and small parts.

17. Check Smoke and Carbon Monoxide detectors during annual inspections.

18. Unit inspections – schedule so as to complete 100% each year.

- It is recommended that inspections be completed by an administrative staff member or the Executive Director and a maintenance staff employee. This will ensure that the executive director and administrative staff become aware of the property conditions and any lease enforcement issues.
- It is recommended that you inspect a manageable number of units each month which allows for all maintenance deficiencies to be completed within the DHCD Property Maintenance Guidelines 14-day period.

19. Lease enforcement: Decorations (Halloween) cords running through doors and windows.

a. Inspect all basements for proper clearance from heating systems (5ft).

b. Fire prevention notices to tenants.

QUINCY HOUSING AUTHORITY

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November Preventative Maintenance Task

1. First Saturday in November reset light timers and clocks back 1 hour for daylight saving time.

2. Monitor and issue on-going snow removal work orders.

3. Inspect trees and trim as needed (maintain 10ft clearance from all structures).

4. Monitor and issue on-going snow removal work orders.

5. Clean common area carpets and flooring.

6. Clean/disinfect compactor and trash chutes.

7. Vehicle Inspection:
   a. Check all fluid levels: crank case, transmission, etc.
   b. Check antifreeze, radiator rust inhibiter, and thermostat.
   c. Check windshield washer fluid.
   d. Check belts and hoses.
   e. Check plugs, wiring, battery, clean and grease terminals.
   f. Clean out air cleaner.
   g. Check wheel alignment and tire balance (signs of uneven wear).
   h. Check heater and defroster.
   i. Check wiper blades for wear.
   j. Check underbody for corrosion and hose off.

8. Inventory of supplies and small parts.

9. Lease enforcement: Blocked egresses.

10. Keep all chimneys, exhaust and intake vents free of snow throughout the winter season and keep dryer exhaust vents free of snow throughout the winter season.

    - Blocked chimneys, exhaust vents and intake vents could result in carbon monoxide poisoning and can affect the performance of the furnace.

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December Preventative Maintenance Task

1. Monitor and issue on-going snow removal work orders.

2. Check and replace flags as needed.

3. Clean/disinfect compactor and trash chutes.

4. Vehicle Inspection:

   a. Check all fluid levels: crank case, transmission, etc.
   b. Check antifreeze, radiator rust inhibiter, and thermostat.
   c. Check windshield washer fluid.
   d. Check belts and hoses.
   e. Check plugs, wiring, battery, clean and grease terminals.
   f. Clean out air cleaner.
   g. Check wheel alignment and tire balance (signs of uneven wear).
   h. Check heater and defroster.
   i. Check wiper blades for wear.
   j. Check underbody for corrosion and hose off.

5. Inventory of supplies and small parts.

6. Lease enforcement: Decorations (Christmas) Cords running through doors and windows.

7. Keep all chimneys, exhaust and intake vents free of snow throughout the winter season and keep dryer exhaust vents free of snow throughout the winter season.
   Blocked chimneys, exhaust vents and intake vents could result in carbon monoxide poisoning and can affect the performance of the furnace.

Deferred Maintenance Plan

Item	Date added to Deferred Maintenance Plan	Item Description	Location or Unit Number	Reason Deferred	Estimated Cost	Material Needed	Original Work Order Number	Target Completion Date	Actual Completion Date	Other Comments
Quincy Housing Authority currently has no deferred work orders.										

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 6/30/2025. It also shows the approved budget for the current year (2025) 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 QUINCY HOUSING AUTHORITY operating reserve at the end of fiscal year 2024 was $3,691,693.00, which is 91.99% 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 QUINCY HOUSING AUTHORITY						
REVENUE						
Account Number	Account Class	2024 Approved Revenue Budget	2024 Actual Amounts Received	2025 Approved Revenue Budget	% Change from 2024 Actual to 2025 Budget	2025 Dollars Budgeted Per Unit per Month
3110	Shelter Rent -Tenants	5,262,552.00	5,273,935.00	5,295,264.00	0.40%	482.26
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	0.00	87.00	0.00	-100.00%	0.00
3611	Interest on Investments - Restricted	0.00	0.00	0.00	0.00%	0.00
3690	Other Revenue	25,800.00	51,718.00	25,800.00	-50.10%	2.35
3691	Other Revenue - Retained	58,200.00	172,183.00	58,200.00	-66.20%	5.30
3692	Other Revenue - Operating Reserves	0.00	0.00	0.00	0.00%	0.00
3693	Other Revenue - Energy Net Meter	0.00	0.00	0.00	0.00%	0.00
3801	Operating Subsidy - EOHLC (4001)	2,710,341.00	2,256,233.00	3,164,858.00	40.30%	288.24
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	8,056,893.00	7,754,156.00	8,544,122.00	10.20%	778.15

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

EXPENSES

Account Number	Account Class	2024 Approved Revenue Budget	2024 Actual Amounts Received	2025 Approved Revenue Budget	% Change from 2024 Actual to 2025 Budget	2025 Dollars Budgeted Per Unit per Month
4110	Administrative Salaries	586,492.00	582,976.00	636,862.00	9.20%	58.00
4120	Compensated Absences	0.00	10,504.00	0.00	-100.00%	0.00
4130	Legal	11,600.00	0.00	11,600.00	100.00%	1.06
4140	Members Compensation	39,600.00	33,000.00	39,600.00	20.00%	3.61
4150	Travel & Related Expenses	0.00	0.00	0.00	0.00%	0.00
4170	Accounting Services	15,375.00	11,717.00	16,144.00	37.80%	1.47
4171	Audit Costs	16,720.00	16,546.00	18,390.00	11.10%	1.67
4180	Penalties & Interest	0.00	0.00	0.00	0.00%	0.00
4190	Administrative Other	1,143,670.00	1,126,487.00	1,285,390.00	14.10%	117.07
4191	Tenant Organization	7,000.00	4,698.00	22,875.00	386.90%	2.08
4100	TOTAL ADMINISTRATION	1,820,457.00	1,785,928.00	2,030,861.00	13.70%	184.96
4310	Water	1,137,648.00	976,037.00	1,132,459.00	16.00%	103.14
4320	Electricity	962,396.00	718,228.00	797,867.00	11.10%	72.67
4330	Gas	178,134.00	160,624.00	178,509.00	11.10%	16.26
4340	Fuel	0.00	0.00	0.00	0.00%	0.00
4360	Net Meter Utility Debit/Energy Conservation	0.00	154,060.00	0.00	-100.00%	0.00
4390	Other	0.00	0.00	0.00	0.00%	0.00
4391	Solar Operator Costs	600,000.00	511,328.00	853,000.00	66.80%	77.69
4392	Net Meter Utility Credit (Negative Amount)	-600,000.00	-658,151.00	-853,000.00	29.60%	-77.69
4300	TOTAL UTILITIES	2,278,178.00	1,862,126.00	2,108,835.00	13.20%	192.06

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

EXPENSES

Account Number	Account Class	2024 Approved Revenue Budget	2024 Actual Amounts Received	2025 Approved Revenue Budget	% Change from 2024 Actual to 2025 Budget	2025 Dollars Budgeted Per Unit per Month
4410	Maintenance Labor	337,963.00	409,395.00	436,713.00	6.70%	39.77
4420	Materials & Supplies	390,000.00	403,763.00	420,000.00	4.00%	38.25
4430	Contract Costs	2,062,620.00	1,921,866.00	2,142,620.00	11.50%	195.14
4510	Insurance	334,265.00	306,808.00	405,801.00	32.30%	36.96
4520	Payment in Lieu of Taxes	18,576.00	18,517.00	18,576.00	0.30%	1.69
4540	Employee Benefits	481,782.00	553,942.00	623,000.00	12.50%	56.74
4541	Employee Benefits - GASB 45	0.00	211,317.00	0.00	-100.00%	0.00
4542	Pension Expense - GASB 68	0.00	0.00	0.00	0.00%	0.00
4570	Collection Loss	120,000.00	68,038.00	90,000.00	32.30%	8.20
4571	Collection Loss - Fraud/Retroactive	0.00	0.00	0.00	0.00%	0.00
4580	Interest Expense	0.00	4,900.00	0.00	-100.00%	0.00
4590	Other General Expense	0.00	0.00	7,200.00	100.00%	0.66
4500	TOTAL GENERAL EXPENSES	954,623.00	1,163,522.00	1,144,577.00	-1.60%	104.24
4610	Extraordinary Maintenance	93,000.00	4,820.00	335,000.00	6850.20%	30.51
4611	Equipment Purchases - Non Capitalized	0.00	0.00	0.00	0.00%	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	3,023,032.00	0.00	-100.00%	0.00
4600	TOTAL OTHER EXPENSES	93,000.00	3,027,852.00	335,000.00	-88.90%	30.51
4000	TOTAL EXPENSES	7,936,841.00	10,574,452.00	8,618,606.00	-18.50%	784.94

Consolidated Budget (400-1) for all state-aided 667 (Elderly), 200 (family), and 705 (scattered site family) developments owned by QUINCY HOUSING AUTHORITY						
SUMMARY						
Account Number	Account Class	2024 Approved Revenue Budget	2024 Actual Amounts Received	2025 Approved Revenue Budget	% Change from 2024 Actual to 2025 Budget	2025 Dollars Budgeted Per Unit per Month
3000	TOTAL REVENUE	8,056,893.00	7,754,156.00	8,544,122.00	10.20%	778.15
4000	TOTAL EXPENSES	7,936,841.00	10,574,452.00	8,618,606.00	-18.50%	784.94
2700	NET INCOME (DEFICIT)	120,052.00	-2,820,296.00	-74,484.00	-97.40%	-6.78
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	120,052.00	-2,820,296.00	-74,484.00	-97.40%	-6.78

Explanation of Budget Accounts

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

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

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

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

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

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

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

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

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

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

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

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

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

3802: Operating Subsidy – MRVP/AHVP Landlords:

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

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

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

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

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

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

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

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

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

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

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

4191: Tenant Organization: LTO Funding by the LHA. Upon request the LHA shall fund all LTOs in a city or town at the annual rate of $25.00 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.

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

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

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

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

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

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

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

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

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

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

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

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

4520: Payments in Lieu of Taxes:

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

Narrative Responses to the Performance Management Review (PMR) Findings

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

Explanation of PMR Criteria Ratings

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

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

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

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

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

Policies

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

Policy	Last Ratified by Board Vote	Notes
*Capitalization Policy	10/19/2016	
*Fair Housing Marketing Plan	6/15/2022	
*Grievance Policy	10/5/2020	
*Language Access Plan	6/15/2022	
*Personnel Policy	7/18/2018	
*Procurement Policy	6/20/2018	
*Reasonable Accommodations Policy	6/15/2022	
*Rent Collection Policy	6/20/2018	
Community Room Use	11/1/2000	
Maintenance and Other Charges	8/12/2020	
Parking	5/3/2017	
Pet Policy	3/28/2018	
Smoking Policy	7/8/2015	

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

Waivers

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

Description	Reason	Date Approved by EOHLC	Date Expired

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

Glossary

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

AHVP: Alternative Housing Voucher Program

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

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

ANUEL: Allowable Non-Utility Expense Level

AP: Annual Plan

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

Cap Share is the amount of Formula Funding spending approved by 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 the ensure that the necessary funding will be available

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

CIMS 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 V EOHLC'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
- Maintence Narrative Answers
- Cover sheet for tenant satisfaction surveys
- Greater Boston Legal Services (GBLS) Commentary
- Public Hearing Comments
- QHA LTO Review Meeting Comments
- QHA LTO Certification Letter

QUINCY HOUSING AUTHORITY TENANT ASSOCIATIONS
2027 DRAFT ANNUAL PLAN REVIEW & INPUT MEETING

June 9, 2026

Rick Brouillard
Director of Modernization
Quincy Housing Authority
80 Clay Street, Quincy MA 02170

To: Rick Brouillard or Whomever it may concern:

This letter shall serve to certify that a Local Tenant Organization (LTO) meeting was held at 2:00 PM on Monday, June 8, 2026, at 73 Bicknell St., 5th floor meeting room, Quincy MA.

The purpose of this meeting was to review the **2027** Annual Plan including the Capital Plan and obtain input from the Local Tenant Organizations.

The meeting was chaired by Rick Brouillard.

Present at this meeting were the following:

1. Rick Brouillard, Director of Modernization, Quincy & Marshfield Housing Authorities
2. Amanda Cheverie, Assistant Executive Director, Quincy Housing Authority
3. Russell Sharp, Assistant Director of Modernization, Quincy Housing Authority
4. Eileen Dever, Property Management Supervisor, Quincy Housing Authority
5. Lori Schilling, Property Manager, Quincy Housing Authority
6. Lyssa Lucien, Property Manager, Quincy Housing Authority
7. Lester Gee, Property Manager, Quincy Housing Authority
8. Richard Wakhweya, Inspector, Quincy Housing Authority & Resident Agent, HRCI
9. Christina Duncan, President, HRCI
10. Debra Gibson, President, O'Brien Towers & Crowley Court Tenant Association
11. Bret Perkins, President, Elderly Service Residents Council
12. Ed Houten, Vice President, O'Brien Towers & Crowley Court Tenant Association
13. Margaret Munchbach, Crowley Court

Notes to include tenant input and concerns were recorded.

Respectfully submitted,

Christina Duncan
President
Harborview Residents Committee, Inc.

Richard Wakhweya
Executive Board Member - Resident Agent
Harborview Residents Committee, Inc. - HRCI

Deborah Gibson
President
Crowley Court Local Tenants Association

Debra A. Gibson

Brett Perkins
President
Elderly Service Residents Council

Brett Perk
President.

Respectfully submitted,

Christina Duncan
President
Harborview Residents Committee, Inc.

Richard Wakhweya
Executive Board Member - Resident Agent
Harborview Residents Committee, Inc. - HRCI

Deborah Gibson
President
Crowley Court Local Tenants Association

Brett Perkins
President
Elderly Service Residents Council

Quincy Housing Authority
Local Tenant Organization FY2027 Annual Plan Review & Participation meeting
6/8/2026, 73 Bicknell St., 5th Floor Community Space

Record of Substantive Comments 2027 AP/CIP

Meeting was started by Rick Brouillard at 2:00 PM.
There were 13 attendees comprised of **Local Tenant Organization members, and Quincy Housing Authority**
Substantive comments are captured below.
The meeting ended at 4:00 PM

1. The design of the picnic tables provided at various developments needs to accommodate handicapped/disabled residents. A suggestion that the benches be the slide in type and do not have a cross piece that requires the resident to lift their leg up over 18 inches to get seated on the bench. Action: This will be discussed with the Director and may be worked into the Capital Plan as a Revision to the Capital Plan after its approval by EOHLC.
2. The residents of Snug Harbor, 200-1, mentioned that Security Cameras are needed to deter and help mitigate vandalism and theft throughout the development. Action: QHA is in process of strengthening its Security Surveillance systems and will be pursuing a maintenance contract for its security systems. QHA will review the Capital Plan to evaluate the feasibility of adding a Capital project or projects for System installation.
3. The LTO representative for Snug Harbor, 200-1, said that Building unit number signage is needed at the building rear. Action: The Building number Signage will be reviewed with the Director to discuss options for implementing this.
4. The LTO representative for Snug Harbor, 200-1, said that Paving throughout Snug Harbor is needed. Action: QHA is working with EOHLC on a plan to get this condition addressed. This project will be escalated.
5. The Crowley Court, 667-1, Tenant representative said that the metal Trellises in front of the buildings need painting. Action: QHA will evaluate whether to do this as a Maintenance project or factor it into the Capital plan.
6. The Crowley Court, 667-1, Tenant representative said that the Laundry Facility needs a Modernization. Action: QHA will factor this into the Capital plan as a project. It will be introduced as a Revision to the Capital Plan after its Approval by EOHLC.
7. The Sawyer Towers, 667-3, Tenant representative said that a Bench or seating system is needed in the front entry vestibule . Action: QHA will look into options for getting this done.
8. The Crowley Court, 667-1, Tenant representative said that there are two units that have no parking area that is close by which creates a problem for the elderly Crowley Court residents because the Family residents take up the street side parking and the Elderly have to walk long distances.

Action: QHA will look into options for designating two spots for Crowley residents. The Director of Modernization will speak with the residents more about layout and options. (384 Palmer is example)
9. Snug Harbor representatives said that the building numbering on buildings that are located on corners is confusing.
10. The Crowley Court representatives said that the peep holes in the new doors are too high and that most tenants have problems. QHA Modernization will review this with the director and maintenance to address.
11. Snug Harbor representatives said that more ceiling work is needed. Modernization will plan another phase of this work for next year.
12. Paving at Snug harbor was stressed as a priority with special attention at Captains Walk to delineate Street vs sidewalk. QHA has a current project plan and is working with EOHLC to move it forward.
13. HRCI requested an Air Source Heat Pump be installed in their existing office. Modernization will discuss this with the director to see how we can address this.
14. Representatives requested that trash barrels in Germantown be changed from circular type to large rectangular type with wheels which would help solve the problems of wind blowing the barrels, seagulls picking trash bags apart and rodents getting into the trash. They were wondering if QHA or the city could accommodate this. Action: this will be discussed with the director.
15. Representative of West Acres said that West Acres still has the old Rinnai heating units and would be a good candidate for Air Source Heat Pumps. Action: Modernization will discuss with director to see if we can get a grant from the Utility co. to do this.
16. Representative for Louis George Village said that an intercom system is needed for the entryways. Action: Modernization will review with Director to determine how to address.
17. HRCI respresentatives said that their space is not handicapped accessible and needs to be. Also, that QHA vehicles park up on the curb at times blocking access to the entryway for anyone in a wheelchair.
18. It was mentioned by a couple of representatives that the Maintenance Request System is difficult for those that don't understand English and does not prompt the individual to ask for the Language Line.
19. It was commented that the Annual Preventative Maintenance Plan should be updated. This will be done.

Quincy Housing Authority
Local Tenant Organization FY2027 Annual Plan Review & Participation meeting
6/8/2026, 73 Bicknell St., 5th Floor Community Space

20. It was mentioned that two of the Commissioners on the Housing Authority board have terms that show that they are expired. QHA responded that it is likely that this is being held up at the Mayors office. The Director will inquire as to the delay.
21. Representative for HRCI commented that the Grounds policy is being reviewed by MassUnion.
22. On page 9 of 13 of the Annual Operating budget section, the definition of the Budget line 4191 is incorrect. It should read ".....Upon request the LHA shall fund all LTOs in a city or town at the annual rate of $25 per state aided public housing unit.....
*The Authority will take this information into consideration when finalizing the Capital Plan. Given the MHA's existing priorities and its limited Capital resources from the state, these items may or may not be able to be planned within the first three years of the Capital Plan.

James Marathas, Executive Director

6/29/2026
Date

QUINCY HOUSING AUTHORITY

80 CLAY STREET
QUINCY, MASSACHUSETTS 02170-2799

James N. Marathas
Executive Director
Telephone: (617) 847-4350
Fax: (617) 770-2876

Quincy Housing Authority 2027 Annual Plan Public Hearing
Record of Substantive Comments from the Public

There were three members of the General Public present, and no residents.

1. Two of the members of the public had questions regarding the content of the Annual plan, most of which were answered but there were no comments that would require modification of the plan. There were no other substantive comments from the third individual.

2. Greater Boston Legal Services (GBLS) offered a summary of their thorough review of the Annual Plan along with comments. QHA appreciates the GBLS dedication to the preservation of affordable housing in MA. The GBLS Commentary letter is uploaded to the Annual Plan.

   Having received this 15-page series of comments (mostly non-substantive questions that do not warrant modifications to the plan—other than minor edits) only 1 hour before the Public Hearing, offered no time for QHA to review them and respond in an efficient manner. However, most of the primary questions were answered during the hearing. Given that the Plan had been posted more than 45 days in advance (5/22/2026), had QHA received these comments earlier, it would have had more time to prepare.

   QHA is in the process of developing a response to the GBLS Commentary letter (a copy of which is provided as an attachment to the Annual Plan) which for some of the items requires some administrative research into our files and cross departmental inquiry. Responses will be provided to all questions and items in the letter. A response letter will be sent to GBLS and copied to EOHLC and the Local Tenant Organizations.

James Marathas, Executive Director

7/28/2026
Date

EQUAL HOUSING OPPORTUNITY

"Where our tenants come first"

July 15, 2026

James Marathas, Executive Director
Quincy Housing Authority
80 Clay Street
Quincy, MA 02170
Via email: jmarathas@quincyha.com

RE: QHA Draft State Annual Plan for FY 2027

Dear Executive Director Marathas,

Greater Boston Legal Services (GBLS) submits this letter as commentary on the draft FY2027 State Annual Plan of the Quincy Housing Authority (QHA). We provide the remarks below in the spirit of enhancing QHA's work of creating and sustaining safe, decent, sanitary, and affordable housing environments for people of low income in the City of Quincy while maximizing transparency and opportunities for participation by QHA residents and program participants.

About GBLS

GBLS is a nonprofit legal aid organization that assists over 10,000 working-class individuals and families each year in solving civil legal issues across Greater Boston. Besides providing direct representation of clients in federal and state civil legal proceedings and at administrative hearings, GBLS promotes systemic changes to the law through impact and appellate litigation, legislative advocacy, and community legal education. The attorneys and advocates in GBLS' Housing Unit work primarily to defend hundreds of low- and moderate-income households (including those with elders, veterans, and persons with disabilities) against eviction. Our work also prioritizes the preservation of affordable housing through the provision of support for local elected tenant organizations and Resident Advisory Boards of public housing authorities, particularly with respect to issues arising from the redevelopment of public housing properties. GBLS' service area includes Quincy, where we advocate on behalf of many public housing residents and other low-income tenants who will feel the impact of QHA's current activities for decades to come.

QHA Draft Plan Form and Accessibility

The following points raise practical concerns about the form and accessibility of the draft Plan:

We note that QHA has opted, for at least the second consecutive year, to hold its public hearing on the draft Annual Plan during a monthly meeting of the QHA Board of Commissioners at which a scheduled vote on approval of the Plan is included on the same agenda. This timing does not allow for adequate consideration of any public input about the draft Plan that may be provided at the hearing, and may discourage QHA from revising its draft in response to concerns raised at the hearing. We recommend that QHA postpone today's scheduled vote to allow for adequate consideration of comments received on the draft Annual Plan, including any revisions to the draft Annual Plan that may be warranted, and schedule future public hearings on all draft Plans (state and federal) at least one week in advance of any scheduled vote by the QHA Board of Commissioners to allow for meaningful consideration of any comments. We also urge QHA to exercise its discretion under 760 CMR 6.09(3)(h) to extend the comment deadline for Local Tenant Organizations beyond the public hearing date as a means of encouraging participation by QHA residents who may have additional feedback on matters discussed at the hearing.

We appreciate QHA's efforts to ensure public access to Annual Plan materials via the QHA website. The main webpage at https://www.quincyha.com/ features a prominent announcement with information about the draft Plan's comment process and timeline, relevant contact information, and a link to the EOHLC webpage where the draft Plan can be found.[1] To further facilitate meaningful public input, we recommend that other portions of the QHA website be reviewed and updated as appropriate to provide contextual information (such as prior years' Annual Plans and hearing notices) in a consistently organized manner.

Comments and Questions

We recommend that QHA provide more information on several elements of its draft Plan. Reference is made below to relevant sections. Page numbers correspond to pages of the PDF file provided on the EOHLC webpage. Questions are in bold text.

1. Overview and Certification

- State-Aided Public Housing Developments table (p. 18):
    - The Plan template language states that units designated for clients of Department of

[1] However, the link on this webpage to QHA's approved Annual Plan for FY2026 downloads an unusable 0KB file. During our review of the current draft Plan, we used the FY2026 draft Plan available on the QHA website (at https://qha.wpenginepowered.com/wp-content/uploads/2025/03/QHA-2026-Annual-Plan-Posted-Draft.pdf) for comparison purposes.

Mental Health (DMH) and Department of Developmental Services (DDS) are to be aggregated separately. Since there are subsequent references to such units ("DMH Set Aside Kitchens and Baths" on p. 25 and an affirmative response on p. 30 to the question of whether QHA has "one or more DDS/DMH developments"), we presume such units are included in the "Other Special Occupancy units" category. **How many of each type of unit are included in this category? Are there other units in this category with designations other than DDS or DMH?**

- **Can QHA provide more specific information (e.g. addresses, number of buildings) for its "Family units in smaller developments" category?**

- The number of units in the "Other Special Occupancy units" category fell from 15 to 13 since last year's draft Plan. **Can QHA explain why this number changed?**

- The number of buildings listed for Snug Harbor fell from 102 to 99 since last year's draft Plan, while the number of units (99) remained constant. **Can QHA explain how this occurred?**

- Massachusetts Rental Voucher Program (MRVP): This section states that QHA manages 26 MRVP vouchers. **Can QHA provide a breakdown of the types of MRVP vouchers it manages (how many are tenant-based and how many project-based)?**

- Federally Assisted Developments (p. 18): This section states that QHA manages federally-assisted public housing developments and/or federal rental subsidy vouchers serving 2222 households.
  - While last year's draft state Annual Plan omitted this section, QHA's recently posted draft FY2026 federal Annual Plan indicates that QHA currently serves only 2124 such households (40 public housing units + 2084 housing choice vouchers, sec. A1 on p. 1). **Can QHA explain this discrepancy?**
  - It would be helpful to see a more detailed breakdown of numbers of federal family units, federal elderly/disabled units, Section 8 HCVP, Section 8 PBV, and RAD units. **Can QHA share this information?** Having a clear understanding of the portfolio would help in assessing any proposed state plan changes and how those may affect overall delivery of assistance.
  - To track changes in the portfolio over time, it would be helpful to know if any of QHA's federal units are the result of federalization of previously state-assisted units. **Can QHA share specific data on any federalized units?**
  - The draft Plan template does not require QHA to provide specifics on any plans for federalization, but this information would also be helpful for transparency and tenant participation, particularly as QHA's federal annual plan stated that QHA is "exploring the federalization of 218 units of state-funded public housing units, with the

anticipation that these units will then by converted through the RAD process." We note that this plan was developed before HUD announced the termination of Restore-Rebuild and **urge QHA to include in its State Annual Plan updates and details about these plans,** including but not limited to the names of all developments included, the approximate timeframes/project status, and a description of all steps being taken to facilitate resident participation in these plans and to protect housing affordability for residents who face barriers to affordability in federally funded housing programs. Additionally, we encourage QHA to provide specifics about any technical assistance being provided to LTOs to facilitate their meaningful input related to proposed projects, as provided in M.G.L. c. 121B, § 34, as amended by Section 35 of Chapter 150 of the Acts of 2024 (Affordable Homes Act), or as otherwise may be needed.

- LHA Board of Commissioners (p. 19): In this section, two of the five Commissioners (including the designated Resident Representative member) are listed as having terms that expired in February 2026. **Can QHA confirm whether this list is accurate? If so, can QHA provide an update on any efforts to fill these positions in accordance with applicable state law?**

- [Not titled](p. 19): In past years, a listing of Local Tenant Organizations (LTOs) was included here; however, the listing is omitted from this year's draft Plan and apparently is no longer required due to a change in the template Plan provided by EOHLC. To encourage robust resident participation in QHA operations, we recommend that QHA take other measures to share information about any LTO (and Resident Advisory Board) actively representing tenants' interests, seeking recognition, or awaiting elections. **Can QHA share this information on its website?**

- Plan History (p. 20): The draft Plan available through EOHLC's website appears to be current through 7/2/2026 (as dated on the document footer) and indicates in row B of this section that there was notification to all LTOs and/or QHA's Resident Advisory Board on 5/22/2026. We appreciate that the updated draft includes this information. Although no date is listed for row E -- "Hold quarterly meeting with LTO or RAB to review the draft AP. (Must occur before the LHA Board reviews the Annual Plan.)" -- the draft Plan in later sections includes documents associated with a June 9th meeting with LTO representatives. If that was the quarterly meeting referenced here, this section should be updated. Additionally, however, we could not determine from any part of the draft Plan whether QHA has an active Resident Advisory Board (RAB). **Can QHA confirm whether there is a RAB and if so, whether the draft Plan was shared and discussed with that group?**

- Capital Improvement Plan (CIP) Description (pp. 22-23):

Note: comments about material under this subheading address changes to the EOHLC Annual

Plan template, rather than information furnished by QHA.

- Language in this section is quite different from that in prior years' Plans, apparently due to updates to the Annual Plan template. Overall, we think the simplified phrasing and formatting choices here improve readability. We also appreciate the new context provided about the reasons project plans may change over time.

- As stated under the new "Why Project Schedules Can Shift" subheading, "it is helpful to compare the current year's CIP with the prior year's CIP" for a better understanding of how plans can change over time. While this suggestion is likely to be helpful in future years, it is less so for the current cycle because the reporting format has changed so significantly since last year.

- We recommend that this section be further revised to clarify *how* CIP revisions take place between Annual Plan cycles, and to what extent QHA and other Housing Authorities must provide opportunities for LTO and public participation and comment on such changes. As mandated by 760 CMR 6.09(3)(i)(2), a Housing Authority "shall consult" with LTOs regarding "[a]ny planned or ongoing capital projects, including status, schedule, budget and expenditures of such projects, and *such consultation shall occur at least quarterly, between CIP submissions*" (emphasis added). It is not clear, however, which changes would trigger consultation between CIP submissions. **Is there a certain threshold that must be met to initiate a public process for interim CIP changes? Should there be some timely notice to residents and/or LTOs of more minor CIP changes where consultation is not required?**

- Under the "Other Funding Sources" subheading, there have been changes to the listing of parts included in a CIP. Two items have been removed: the "table of available funding sources and amounts" and the "table showing special awards and other funding for targeted projects, if any, which supplements Formula Funding awarded to the LHA". **Why were these removed?** A new addition here is "a list of existing projects approved in last year's CIP Plan or added to the plan through CIP Revision during the year". These changes significantly alter the form and content of information presented about the CIP in the subsequent pages of the draft Plan. While we acknowledge the importance of streamlining reporting processes, the lack of information about other funding sources and amounts diminishes fiscal transparency. The resulting document does not adequately inform residents or the public about current and projected Housing Authority resources, outlays, and activities.

- <u>Active and Proposed Projects with Projected Spending by Fiscal Year</u> (pp. 24-27):

  - Despite the title of this section, projected spending by fiscal year is provided only for

the proposed projects on pp. 26-27. No data is available on projected spending by fiscal year for "Active Projects" (pp. 24-25) which constitute the majority of projects listed. **Can QHA provide projected figures by fiscal year and projected dates for obligation and completion of its Active Projects?**

- As noted above, the Plan template states that "a list of existing projects approved in last year's CIP Plan or added to the plan through CIP Revision during the year" is a required CIP element. It would be helpful to identify the projects fitting each description – that is, which were approved in last year's CIP Plan, and which added through revisions during the year – but the list of "Active Projects" fails to do so. **Can QHA provide this information?**

- The table of Active Projects lacks critical metrics that have been provided in past years' Plans. The "Amount Spent Prior to Plan" and "Remaining Planned for [year]" columns have been removed. Instead, only a "Total Development Cost" (TDC) is provided for each active project. As a result, the status of any listed project is anyone's guess. The reader is left wondering about each project's anticipated timeframe for completion, whether figures provided are actual or estimates, whether the TDC has been (or may be) adjusted during the life of the project, how much has been spent to date, and how much remains outstanding. **Can QHA clarify if the TDC figures here represent amounts projected to be spent during the current fiscal year? If they do not, can QHA a projected timeframe (along with anticipated costs by fiscal year) for each Active Project?** We recommend that EOHLC revise the table in the template Plan to display this information clearly.

- A relatively high percentage of projects listed (13 active projects and one project proposed for FY2027) are associated with QHA's Force Account. While this can be a cost-effective way to get work done by staff with the proper skills, it may also mean that those staff are less available to do routine work elsewhere at QHA while they are focused on the Force Account project(s). **Is QHA aware of any delays or other negative impacts on routine maintenance work due to use of the Force Account?**

- Eleven Active Projects have the TDC listed as zero. **What does this mean?** It may be that these items originally had funds assigned, but because other matters cost more or got higher priority, money was shifted; however, it is important that QHA clarify when and why any such reallocations took place. **Can this information be provided for each item listed below?** All items were included in the FY2026 draft Plan with figures as shown:

    - #243262 Sliding Glass Door Replacement (Tobin Towers) -- Total Cost $907,500, Amount Spent Prior to Plan $0, Remaining Planned for 2025 $0,

FY2026 Planned $23,142, FY2027 $840,060, FY2028 $44,300, subsequent fiscal years $0

- #243282 Renovate Off-Line Units / Force Account (Snug Harbor) -- Total Cost $56,350, Amount Spent Prior to Plan $0, Remaining Planned for 2025 $4,061, FY2026 Planned $52,290, subsequent fiscal years $0

- #243283 Emergency Generator (David J. Crowley Court) -- Total Cost $20,873, Amount Spent Prior to Plan $0, Remaining Planned for 2025 $20,873, FY2026 Planned $0, subsequent fiscal years $0

- #243286 Window Replacement (Sawyer Towers) -- Total Cost $$378,125, Amount Spent Prior to Plan $0, Remaining Planned for 2025 $0, FY2026 Planned $364,815, FY2027 $13,310, subsequent fiscal years $0

- #243291 Force Account / Extensive Unit Rehabilitation (Westacres) -- Total Cost $67,500, Amount Spent Prior to Plan $0, Remaining Planned for 2025 $0, FY2026 Planned $67,500, subsequent fiscal years $0

- #243292 Window Replacement (David J. Crowley Court) -- Total Cost $89,843, Amount Spent Prior to Plan $0, Remaining Planned for 2025 $9,928, FY2026 Planned $79,916, subsequent fiscal years $0

- #243293 Heating Boiler Replacement (75 South Street) -- Total Cost $62,323, Amount Spent Prior to Plan $0, Remaining Planned for 2025 $0, FY2026 Planned $62,323, subsequent fiscal years $0 [Note: we recommend specifying in the CIP whether this is a small family site or special occupancy DDS or DMH. The QHA website lists a "South Street/Franklin Street" site under its state family portfolio; however, active project #243302 at the 75 South Street development has a project title denoting “DMH Set Aside”.]

- #243294 Force Account - Sewer Piping Phase II (Snug Harbor) -- Total Cost $20,000, Amount Spent Prior to Plan $0, Remaining Planned for 2025 $16,890, FY2026 Planned $0, subsequent fiscal years $0 [Note: there was a discrepancy here between total cost and planned spending.]

- #243295 Paint Basement Doors and Replace Hardware (Snug Harbor) -- Total Cost $75,625, Amount Spent Prior to Plan $0, Remaining Planned for 2025 $18,452, FY2026 Planned $57,174, subsequent fiscal years $0

- #243296 Parking Lots Repavement (Snug Harbor) -- Total Cost $556,600, Amount Spent Prior to Plan $0, Remaining Planned for 2025 $0, FY2026 Planned $535,504, FY2027 $21,296, subsequent fiscal years $0

- #243298 Community Room Kitchen Renovations / Force Account (Sawyer Towers) -- Total Cost $19,250, Amount Spent Prior to Plan $0, Remaining Planned for 2025 $19,250, FY2026 Planned $0, subsequent fiscal years $0

- We note that the first and most expensive Active Project listed is "ARPA FF: Elevator Upgrades", and Active Project #243271 (the third most expensive) as "ARPA Targeted Federal Pacific Electrical Systems Replacement". No anticipated completion dates are provided. **Has this funding had already been obligated or is there a danger of losing funds for these projects?**

- Can QHA provide more information about item #243313 (Snug Harbor Trail, TDC $350,053)? This seems like an unusual use of EOHLC funds, especially given that a number of other CIP items appear to be more directly related to ensuring high-quality housing for QHA residents. It would be helpful to know more about QHA's process for deciding to commit $350,00 to this project, including whether opportunity was provided for LTO input on this priority.

- **Can QHA provide more information about Project #243249 ("Security System 15 Bicknell St.")? Is this a particular entrance at Snug Harbor that affects multiple buildings, or just one building? If one building, what is the overall plan for the security system (for example, what may already be completed, and what is the plan to address the balance of the buildings)?**

- **Can QHA provide more information about Project #243266 ("Bathtub Shower Fixture Replacement")?** While no site is listed here, last year's draft Plan indicates this is for "Safford Street 689-01" which does not correspond to any of the State-Aided Public Housing Developments listed in this year's draft Plan.

- While item #243288 ("Exterior unit door replacement") has no site listed, the FY2026 draft Plan indicates this is for David J. Crowley Court. The $518,811.04 TDC listed in the current draft Plan significantly exceeds last year's CIP figures: Total cost $459,896, Amount Spent Prior to Plan $0, Remaining Planned for 2025 $41,688, FY2026 Planned $418,209, subsequent fiscal years $0. **Can QHA share more details about this project and the reasons for the increased cost?**

- **Can QHA provide more detail about items #243208 and #243231?** Both appear to be relatively large expenditures connected with the Louie George[2] development ($578,620.05 for "SUST: FF: Exterior Entrance Door Replacement" and $300,816.71 for "Balcony door replacement and renovations", respectively).

[2] We refer to this property by the name used in the draft Plan, but it is listed as "Louis George" on the QHA website.

- For the "Exterior Door Replacement- Maint. Facility" project proposed for FY2027 (TDC $78,650), can QHA clarify how many doors are involved?

- The 'Narrative Questions' with Additional Information (pp. 28-32)

  - (1) Project Closeout: QHA states that it has not "reviewed in progress projects, contacted [its] PM to close out old projects, and recirculated unused funds" and gives a further explanation that "Several Projects are complete and are awaiting final invoicing and Admin. We ae in the process of cross checking all projects and closing out schedules and reporting to EOHLC." **Can QHA provide an estimated time frame for closing out its old projects? Additionally, can QHA describe any plans to engage LTOs in discussions about reprogramming in the event that there are any excess funds available after projects are closed out?**

  - (2) Request for Additional Funding: The text appearing here seems to be instructions left over from the draft Plan template. **Can QHA confirm whether it intended to provide any additional narrative response here?**

  - (3) Overall Goals of the Capital Improvement Plan: QHA's response here is not specific as to how any particular work may positively impact the operating budget. **Can more detail be provided?** Additionally, **can QHA provide details of its plans to consult with LTOs about priorities as required by 760 CMR 6.09(3)(i)(1)?**

  - (4) Changes from the Previous CIP: QHA notes here that the new CIP "defers the Window Replacement Projects at Tobin Towers and Sawyer Towers as those are awaiting study results and further cost estimating." However, the Sawyer window replacement is listed as an active project with a zero-dollar cost, while the Tobin replacement is proposed for FY2028 and has a TDC of $453,750. **Can QHA clarify why these projects are listed differently in the sections above?** Additionally, as noted above, there should be consultation with LTOs at least quarterly about the status of any planned or ongoing capital projects. See 760 CMR 6.09(3)(i)(2). **Can QHA confirm whether it consulted with LTOs about the deferrals described here, and describe any feedback provided by LTOs?**

  - (7) High Priority Deficiencies: The response here acknowledges that QHA has high-priority capital deficiencies in its CPS backlog, but provides no explanation of the specific deficiencies and does not articulate any meaningful plan to address the deficiencies. Each Priority 1 or 2 project in backlog which is not included should be broken out. QHA should articulate its plan to address each item (including projected timeframe, etc.) The narrative response here should also detail any discussion with affected LTOs and their feedback. **Can QHA provide this information?**

- (8) Accessibility: The response here indicates that there are no accessibility deficiencies in units, common areas, or sites across QHA's portfolio. This seems extraordinary given the age of most buildings, and given the number of projects that typically serve to improve accessibility, such as elevator upgrades and parking lot repavement. It would be helpful to know whether EOHLC has provided guidelines to assist local Housing Authorities in identifying accessibility deficiencies.

- (9) Special Needs Development: The response here under "A. DMH/DDS Developments" is incomplete. QHA acknowledges that it does have one or more DDs/DMH developments, but fails to provide any details from the service provider input, as instructed. **Can QHA supplement its response with details from the service provider input?** Additionally, the response here under "B. DMH/DDS Projects" is not informative and largely unintelligible . It appears that QHA may be indicating that it did not include in its draft Plan projects for the DMH/DDS developments recommended by the service provider referenced in the last question; however, there is no meaningful explanation of the reasons for this. A "Service Provider Input Completion Date" given as 5/20/2025 appears to be out of context. **Can QHA provide an explanation of why it did not include recommended projects for DMH/DDS developments and include a substantive summary of the input from the service provider staff?**

- (10) Sustainability Program: **Can QHA share why it opted not to explore any Sustainability Funding that may be available, particularly in light of its goal of reducing operating expenses?**

- (11) Solar Initiatives: **Can QHA revise or explain its negative response here to the question "Does your current CIP contain roof replacement projects?"?** The Active Projects table lists roof replacements at Westacres (#243285) and Snug Harbor (#243297).

- (12) Resilience: **Can QHA provide more detail as to which site and what design elements are planned to address weather vulnerabilities flagged in CPS?**

- (13) Fossil Fuels: QHA states here that no fossil fuel-fired equipment will be installed as part of any project in the CIP. This is commendable. We have concerns however, that the generator installation at Snug Harbor (Active Project #243289) may be inconsistent with this response. **Can QHA provide information about the power source of the generator?**

- (14) Vacant Units: QHA's response here indicates that there are no projects in this CIP submission that are tied to reoccupying vacant units. **Can QHA confirm that**

this is correct? We note that Active Project #243300 refers to "667 Routine Turnovers".

- (17) Other Comments: This response is left blank. Although the template document provided by EOHLC does not contain a section dedicated to the Housing Authority's efforts to promote tenant participation in its capital improvement planning, we recommend that the template be updated to include this. In the interim, we encourage QHA to provide additional commentary in this section about any technical assistance being provided to LTOs to aid in their participation in capital spending decisions related to redevelopment, as provided in M.G.L. c. 121B, § 34, as amended by Section 35 of Chapter 150 of the Acts of 2024 (Affordable Homes Act) or as otherwise may be needed.

- Maintenance and Repair Plan

  - It is not clear if this Maintenance and Repair Plan has been updated since the State Sanitary Code was revised in 2023. We encourage QHA to clarify in the draft Plan whether the Maintenance and Repair Plan has in fact been updated to reflect the 2023 changes, and to ensure that any new Sanitary Code elements are adequately tracked.

  - For both its Emergency Request System (p. 35) and its Normal Maintenance Request Process (p. 36), QHA may want to implement other means of submission and processing, such as use of texts, email tracking, etc. Such measures have been effective when implemented at other local Housing Authorities.

  - Maintenance Plan Narrative (p. 37):

    - **Can QHA confirm that the figures in its Maintenance Budget Summary (subsection D) are correct?** We note that last year's draft Plan also listed $0 for the then-current FY budget; however, the previous year's budget and spending each were over $2.7 million.

    - The Unit Turnover Summary (subsection E) figures here are dramatically different from those in last year's draft Plan. Turnovers fell from 71 to 44; average time from date vacated to make unit "Maintenance Ready" rose from 2 to 25 days; and average time from date vacated to lease up of unit rose from 4 to 46 days. **Can QHA confirm that these are correct, and provide some explanation for the changes?** If QHA is not meeting EOHLC goals for these activities, the draft Plan should describe any plans for improvement.

  - Monthly Preventative Maintenance Tasks (pp. 39-60)

- Throughout, there are several references to “DHCD” which should be replaced with EOHLC.

- January: **Can QHA explain how many residents in which developments are responsible for snow removal under their leases, and attach a sample lease to provide the details?**

- April: Item #14 here refers to an “attached recommended Air Conditioner Policy” and advises checking for “proper AC installation (according to policy)”; however, no such policy is provided with the draft Plan. **Can QHA provide a copy of the policy?** Proper approval and installation may be appropriate concerns where there is a resident-provided air-conditioning unit, but owner-provided units would be QHA’s obligation.

- May: Item #14 here refers to a “policy” related to cooking grills and fire pits, but no policy is provided. **Can QHA provide a copy of the policy?** It may be helpful to provide additional details here about expectations for safe storage and cleaning of grills and fire pits.

- June: Item #13 here refers to a policy related to pools, trampolines, and swing-sets, but no policy is provided. Here again, **can QHA provide a copy of the policy?**

- July: Item #10 here refers to a “pet policy” but none is provided. Here again, **can QHA provide a copy of the policy?** There may be important distinctions between policies applicable to different sites. Additionally, QHA should ensure that appropriate provisions are made regarding support or service animals for persons with disabilities.

- September: Item #11 here refers again to the policy on air conditioners requested above. Additionally, c**an QHA clarify whether the "removal" term bars resident-provided air-conditioning units, or merely means that disposal must be done in a particular way? Are there provisions in QHA’s policy for situations where an air conditioning unit would be otherwise barred but is needed as a reasonable accommodation for a person with a disability?**

- October:
    - Item #3 here on boiler tune-ups notes that “Heating season is September 15th through June 15th". We recommend moving this item

to the September maintenance tasks to ensure boilers are ready for the start of heating season.

- Operating Reserve (p. 62): This section shows significant improvement since last year's plan, when QHA's reserve was $2,995,213 or 81.6% of the full reserve amount. This is to be commended.

- Consolidated Budget (p.p. 63-66)

    - It is unclear why the tables here indicate that the figures provided are for fiscal years 2024 and 2025. **Can QHA provide any clarification?** If this an error in the EOHLC template, it would be helpful for QHA to confirm whether the figures provided are actually its revenue and expenses projected for FY2027 and budgeted/actual figures for FY2026, in spite of the years listed in the column headers. Our comments below refer to the dates as they appear in the draft Plan.

    - **Can QHA clarify why there are no revenue amounts associated with the "Administrative Fee – MRVP" item (account #3400)**, given that it manages several vouchers?

    - On the "Other Revenue – Retained" revenue item (account #3691), the 2024 actual amounts received ($172,183) are dramatically higher than the approved budget amount ($58,200). **Can QHA explain the reasons for this increase?**

    - On the "Operating Subsidy – EOHLC (4001)" revenue item (account #3801), the amount received (2,256,233.00) was much lower than anticipated ($2,710,341) in FY2024. **Can QHA share the reasons for this decrease?**

    - Generally, expense figures provided appear to show that QHA is attempting to account for inflation, which seems prudent.

    - On the "Legal" expenses item (account #4130), figures show zero dollars for actual amounts received in 2024. **Is this correct?**

    - One of the largest expenses listed is "Administrative Other" (Account 4190), with $1,143,670 budgeted and $1,126,487 received for FY2024, and $1,285,390. **Can QHA provide more details about the expenses associated with this account?**

    - The percentage increase (386.90% from 2024 actual to 2025 budget) for the "Tenant Organization" expense item (account #4191) is one of the largest in the budget. We assume this increase is due to EOHLC's revision of Tenant Participation Funding guidelines, which increased funding from $6/unit to $25/unit.

- On the "Net Meter Utility Debit/Energy Conservation" expense item (account #4360), it would be helpful to understand why there was a relatively large expense in 2024 ($154,06 actual amounts received) but no amounts budgeted for either 2024 or 2025. **Can QHA explain?**

- **Can QHA provide details about the $93,000 "Total Other Expenses" (account #4600) and the $954,623 "Total General Expenses" (account #4500) items on p. 65?** Definitions for these items are not provided in the Explanation of Budget Accounts" on pp. 67-73. If they are intended to show subtotals, please clarify which items are encompassed for each line.

- A review of the summary provided on p. 66 makes clear that while QHA was very much in the red at the end of last year, it is less so at the end of this budget cycle. We are glad to see this improvement. Although there is no clear place in this Plan template for QHA to provide a verbal summary of its financial status, it would be helpful to understand how QHA views the big picture.

- Resident Surveys – Background (p. 93)

  - There are several references in this section and on the subsequent pages to "DHCD" which should be replaced by "EOHLC".

  - The description of "Round Three Surveys (2023 – 2027) indicates that surveys will be conducted throughout this period. **Can QHA address whether it anticipates more unit surveys during Round 3 -- and if so, when?**

- Maintenance Chapter Questions (pp. 94-96)

  - In the response to Narrative Question #2, QHA highlights that it has successfully implemented a new visitor parking permit system which improved operations and accessibility for residents, staff, and service providers. This is to be applauded. We suggest that QHA share more information about its model, as it may be worth replicating at other local housing authorities.

  - Also in the response to Narrative Question #2, QHA notes that it has focused on workforce development by having maintenance staff "rotate[] across different properties to provide cross-training opportunities, increasing versatility and ensuring broader coverage across the portfolio." and that the "approach strengthens the team's ability to respond to a wide range of maintenance issues and reduces dependency on any single individual." It may be helpful for QHA to elaborate on this approach will be balanced with use of the force account, particularly where specialized skills (such as electrical work) may be required and

may pull people away to provide other team support.

- Performance Management Review (PMR) Report (pp. 97-106): This report appears to be for the Fiscal Year ending on 6/30/2024. **Can QHA confirm that this is correct, and no more recent report is available?**

- EOHLC PMR Desk Audit Recommendations Report (p. 101):

    - According to this report, QHA had findings in several areas. It would be helpful to know more about how QHA fell short, particularly in the categories where Operational Guidance was issued.

    - Under "Certifications and Reporting Submissions", QHA is instructed to schedule board meetings well in advance. We enthusiastically echo this recommendation. Having advance notice of meetings is critical for transparency and public participation.

- EOHLC CHAMP Close Out Report (p. 103)

    - Some detail is provided here in EOHLC's recommendations, but it would be helpful to know more about how QHA fell short in the area of CHAP Criteria 1b, where Corrective Action was required.

    - It would be helpful to know more about how QHA fell short in the area of CHAP Criteria 2a, where Operational Guidance was issued about ensuring timely recording of vacancies.

- EOHLC PMR Physical Condition Report (pp. 105-106): We are pleased to see no findings on this report and congratulate QHA on its success here. Particularly given the ages of most buildings in QHA's portfolio, this is no small achievement.

Thank you for your consideration of our comments on the draft Plan. We look forward to your responses and would be happy to meet with QHA to discuss these matters further.

Sincerely,

Mary Lu Mendonca, Attorney
Maya Margolis, Paralegal
Laura Massie, Senior Attorney
Greater Boston Legal Services
197 Friend Street
Boston, MA 02114
Mlmendonca@gbls.org

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.

Maintenance Chapter Questions

Narrative Question #1: How would you assess your Maintenance Operations based on feedback you've received from staff, tenants, DHCD (PMR & AUP), and any other sources?

Quincy Housing Authority's (QHA) maintenance operations continue to strengthen and evolve, driven by the strategic addition of new staff, improved internal communication, and consistent reporting to the Executive Director. These efforts have contributed to a more responsive, accountable, and well-coordinated maintenance program that better serves the needs of our residents.

Feedback from tenants has been increasingly positive over the past year, reflecting noticeable improvements in both the timeliness and quality of service. Residents have expressed appreciation for the professionalism, responsiveness, and dedication demonstrated by maintenance staff, who consistently go above and beyond to address issues and ensure safe, well-maintained living environments. This positive trend reinforces our commitment to resident satisfaction as a core performance indicator.

Internally, staff feedback has also been instrumental in identifying operational strengths and areas for refinement. Regular communication, clearer expectations, and a more structured reporting framework have improved efficiency and accountability across the maintenance team. The integration of new personnel has brought additional capacity and fresh perspectives, further enhancing overall performance.

From a regulatory and oversight standpoint, QHA has received positive recognition from the Executive Office of Housing & Livable Communities (EOHLC), specifically the Bureau/Division of Public Housing, regarding the effectiveness of our maintenance operations. Feedback from DHCD reviews, including PMR (Performance Management Review) and AUP (Agreed-Upon Procedures), has affirmed that our systems and practices are functioning well and meeting required standards.

At the same time, QHA maintains a proactive and realistic approach to continuous improvement. We regularly evaluate operational data, inspection results, and stakeholder feedback to identify areas where performance can be enhanced. When deficiencies are identified, we work deliberately to implement corrective actions, whether through process adjustments, additional training, or resource allocation.

While we are encouraged by the progress made and the positive feedback received, we recognize that there is always room for improvement. QHA remains committed to building on this momentum by refining our maintenance operations, leveraging data and feedback, and ensuring we continue to meet and exceed the expectations of our residents, staff, and regulatory partners.

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

Over the past year, Quincy Housing Authority (QHA) has implemented a number of targeted improvements to strengthen maintenance operations, enhance efficiency, and better support both staff and residents.

A key operational enhancement was the addition of a new emergency response vehicle, which has improved our ability to respond quickly and effectively to after-hours calls and urgent maintenance needs across the portfolio. This investment has increased reliability and reduced response times during critical situations.

To address fluctuations in workload due to vacancies and Force Account Projects and ensure timely completion of work orders, QHA has utilized the union hall to supplement staff with temporary labor as needed. This approach has allowed us to remain flexible and responsive when managing competing priorities, seasonal demands, and emergency situations without overextending permanent staff.

We also implemented a new visitor parking permit system, which has improved site management, reduced congestion, and enhanced overall organization at our properties. While not a direct maintenance function, this change has supported operations by minimizing disruptions and improving accessibility for residents, staff, and service providers.

Significant investments have been made in equipment and fleet management. QHA continues its planned truck replacement cycle and, over the past year, purchased two new maintenance fleet vehicles. These additions have improved reliability, reduced downtime, and ensured that staff have safe, modern tools to perform their work efficiently.

Internally, we reconfigured the administrative maintenance office space to improve workflow and communication. This included the installation of new workstations and the creation of a dedicated office for the maintenance supervisor, supporting better oversight, coordination, and staff productivity.

Facility security was also enhanced through the installation of a new security system at the maintenance facility. This upgrade helps protect assets, equipment, and personnel, while also improving overall operational integrity.

A major focus this year has been workforce development. Maintenance staff have been rotated across different properties to provide cross-training opportunities, increasing versatility and ensuring broader coverage across the portfolio. This approach strengthens the team's ability to respond to a wide range of maintenance issues and reduces dependency on any single individual.

In addition, QHA created and filled a new Facility Manager position within the Modernization Department. This role works collaboratively with the Maintenance, Inspections, and Modernization departments, improving coordination across functions and ensuring that capital improvements, inspections, and day-to-day maintenance activities are better aligned.

Collectively, these changes reflect QHA's commitment to continuous improvement, operational efficiency, and proactive asset management. Each initiative has been implemented with the goal of strengthening service delivery, supporting staff, and maintaining high-quality housing for our residents.

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

Over the coming year, Quincy Housing Authority (QHA) aims to build upon recent operational improvements by focusing on efficiency, capacity, staff development, and communication.

A primary goal is to improve the layout and utilization of maintenance, warehouse, and storage spaces. QHA plans to evaluate current space usage and implement a more organized and functional layout that supports workflow efficiency, inventory management, and accessibility of tools and materials. By optimizing these spaces, we expect to reduce time spent locating supplies, streamline daily operations, and improve overall productivity.

QHA also intends to procure and implement additional service contracts to supplement in-house maintenance capabilities. These contracts will help address specialized work, reduce backlog, and ensure timely completion of tasks that require outside expertise. Expanding the use of qualified vendors will provide greater flexibility in managing workload fluctuations and maintaining service standards.

Workforce development remains a key priority. We will continue cross-training maintenance staff across multiple properties and systems to increase versatility and coverage. This approach not only strengthens the team's ability to respond to a wide range of maintenance needs but also supports continuity of operations and reduces reliance on any single individual.

In addition, QHA is committed to improving communication with residents and all stakeholders. This includes enhancing how maintenance-related information is shared, such as work order updates, planned maintenance activities, and project timelines. Clear and consistent communication will help manage expectations, increase transparency, and further improve resident satisfaction.

Overall, these goals reflect QHA's continued focus on operational efficiency, proactive maintenance practices, and high-quality service delivery. By investing in infrastructure, staff development, and communication, QHA aims to further strengthen its maintenance operations and better serve its residents and community partners.

QUINCY HOUSING AUTHORITY

Performance Management Review (PMR) Report

Fiscal Year End 6/30/2024

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

Executive Office of Housing and Livable Communities (EOHLC)

PMR Desk Audit Ratings Summary Official Published PMR Record

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

Housing Authority	QUINCY HOUSING AUTHORITY
Fiscal Year Ending	Jun 2024
Housing Management Specialist	Carrie Sousa
Facilities Management Specialist	Robert Garrett

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

Report Date: 11/25/2024 19:35:38

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

LHA Name	QUINCY HOUSING AUTHORITY
FYE	Jun 2024
HMS Name	Carrie Sousa
FMS Name	Robert Garrett

Criteria	Rating
Staff Certification and Training	No Findings

Report Date: 11/25/2024 19:35:38

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

LHA Name	QUINCY HOUSING AUTHORITY
FYE	Jun 2024
HMS Name	Carrie Sousa
FMS Name	Robert Garrett

CFA Submission

Rating: No Findings

Recommendations: 1. No Recommendations

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

LHA Name	QUINCY HOUSING AUTHORITY
FYE	Jun 2024
HMS Name	Carrie Sousa
FMS Name	Robert Garrett

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. Reporting was submitted 2 days late and data wasn't available for review. QHA had several financial department personnel changes during this fiscal year.

Board Member Training

Rating: Operational Guidance

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. Training needs to be completed upon appointment and then every two-years

Certifications and Reporting Submissions

Rating: Operational Guidance

1. Submit all four quarters of Tenants Accounts Receivables (TAR) application within 60 days of quarter end.
2. Submit all four quarterly operating statements within 60 days of the quarter end.
3. Schedule board meetings well in advance. Consider scheduling a backup date to ensure you are able to have your board vote/approval in time to meet reporting deadlines.
4. Set a recurring appointment in your email calendar for help remembering reporting dates and deadlines.
5. Reporting was submitted 2 days late and data wasn't available for review. QHA had several financial department personnel changes during this fiscal year.

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. Reporting was submitted 2 days late and data wasn't available for review. QHA had several financial department personnel changes during this fiscal year.

Operating Reserve

Rating: Corrective Action

1. Reporting was submitted 2 days late and data wasn't available for review. QHA had several financial department personnel changes during this fiscal year.

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

LHA Name	QUINCY HOUSING AUTHORITY
FYE	Jun 2024
HMS Name	Carrie Sousa
FMS Name	Robert Garrett

CHAMP Criteria 1a

Rating: No Findings

Recommendations: 1. No Recommendations

CHAMP Criteria 1b

Rating: Corrective Action

Recommendations: 1. Prioritize the intake of CHAMP Paper Applications to ensure that all CHAMP Paper Applications are date and timestamped.
2. Prioritize the data entry of CHAMP Paper Applications to ensure that all CHAMP Paper Applications are entered into CHAMP accurately.
3. Ensure applications are uploaded into CHAMP or kept on file. QHA informed us that paper applications from Holbrook were entered under the Quincy system and applications were damaged.

CHAMP Criteria 1c

Rating: No Findings

Recommendations: 1. QHAs performance was exceptional in this category.

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

Rating: No Findings

Recommendations: 1. No Recommendations

CHAMP Criteria 3c

Rating: No Findings

Recommendations: 1. No Recommendations

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

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

LHA Name	QUINCY HOUSING AUTHORITY
FYE	Jun 2024
HMS Name	Carrie Sousa
FMS Name	Robert Garrett

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