

## Notice of Public Hearing

### THE STOCKBRIDGE HOUSING AUTHORITY invites all tenants and the general public to a review of the Authority's Proposed Annual Plan for Fiscal Year 2027

The Annual Plan is intended to provide insight into the Authority's operations and plans for the coming fiscal year as they affect the Authority's state-aided public housing. The Proposed Annual Plan is comprised of the following elements:

1. Proposed Capital Improvement Plan (3-year)
2. Proposed Maintenance and Repair Plan
3. Current Operating Budget
4. Responses to the Performance Management Review (PMR) findings
5. List of housing authority policies
6. List of waivers from governing regulations of the Executive Office of Housing and Livable Communities (EOHLC)
7. Other elements



Hearing time and date: 9:00 AM on 7/7/2026

Hearing location: Heaton Court Community Room  
5 Pine St. - Stockbridge, MA 01262

Residents and the general public are invited to review the Annual Plan before the hearing and may submit public comments as noted below. The Authority shall consider the concerns of any Local Tenants' Organization (LTO) or Resident Advisory Board (RAB) regarding needs and priorities and incorporate some or all of such needs and priorities in the draft plan if deemed by the Authority to be consistent with sound management. Substantive comments will be summarized and included in the Annual Plan when it is submitted to the Executive Office of Housing and Livable Communities (EOHLC).

- o Copies of the Annual Plan are available at the Authority's office or may be reviewed online at <https://publichousingfacilityreview.mass.gov/Public?ap=272>
- o Comments may be submitted orally at the hearing, by emailing the housing authority office, or by submitting written comments at the housing authority office. Comments must be received no later than the close of the public hearing.
- o For reasonable accommodation requests contact the housing authority office by 6/30/2026 at 1:00 PM
- o Contact information for STOCKBRIDGE HOUSING AUTHORITY:  
Office: 5 Pine Street, P.O. Box 419 Stockbridge, MA 01262  
Phone: 413-298-3222  
Email: stockbridgeha@gmail.com

## **Detailed Instructions for Remote Access**

Stockbridge Housing is inviting you to a scheduled Zoom meeting TBD

## Aviso de audiencia pública

### EL/LA STOCKBRIDGE HOUSING AUTHORITY

invita a todos los arrendatarios y al público en general a una revisión del Plan Anual Propuesto por la autoridad para el año fiscal 2027

El Plan anual tiene como objetivo dar a conocer las operaciones de la autoridad y sus planes para el año fiscal entrante en lo que respecta a sus iniciativas de vivienda pública con financiamiento estatal. El Plan anual propuesto comprende los siguientes elementos:

1. Plan de mejoras de capital propuesto (3 años)
2. Plan de mantenimiento y reparaciones propuesto
3. Presupuesto operativo actual
4. Respuestas a los hallazgos en la Revisión de gestión del desempeño (PMR)
5. Listado de las políticas de la autoridad de vivienda
6. Listado de las exenciones a las normas vigentes del Departamento de Vivienda y Desarrollo Comunitario (EOHLC)
7. Otros elementos



Fecha y hora de la audiencia: 9:00 AM on 7/7/2026  
Lugar de la audiencia: Heaton Court Community Room  
5 Pine St. - Stockbridge, MA 01262

Invitamos a los residentes y al público en general a leer el Plan anual antes de la audiencia y a hacer comentarios públicos por los medios que se indican más abajo. La autoridad tomará en consideración las inquietudes de cualquier organización de arrendatarios locales (LTO) o junta asesora de residentes (RAB) en relación con las necesidades y prioridades. Si las considera consistentes con los principios de buena gestión, la autoridad incorporará dichas necesidades y prioridades -en parte o en su totalidad- en la versión preliminar del plan. Los comentarios sustantivos se resumirán e incluirán en el Plan anual cuando este se envíe al Oficina Ejecutiva de Vivienda y Comunidades Habitables (EOHLC).

- o Puede obtener copias del Plan anual en la oficina de la autoridad o consultar el Plan por Internet en <https://publichousingfacilityreview.mass.gov/Public?ap=272>. El Plan está disponible únicamente en inglés.
- o Si desea hacer comentarios, puede hacerlo oralmente en la audiencia o enviar los comentarios por correo electrónico o postal a la oficina de la autoridad de vivienda. Los comentarios se deben recibir antes del cierre de la audiencia pública.
- o Si tiene una solicitud razonable en relación con una discapacidad, póngase en contacto con la oficina de la autoridad de vivienda antes del 7/7/2026 a las 9:00 AM.
- o Información de contacto de STOCKBRIDGE HOUSING AUTHORITY:  
Oficina: 5 Pine Street, P.O. Box 419 Stockbridge, MA 01262  
Teléfono: 413-298-3222  
Correo electrónico: stockbridgeha@gmail.com

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សេចក្តីជូនដំណឹងអំពីសវនករសាធារណៈ

STOCKBRIDGE HOUSING AUTHORITY

អញ្ជើញអ្នកជួល

និងសាធារណជនទូទៅទាំងអស់ឲ្យទៅពិនិត្យមើលឡើងវិញនូវផែនការប្រចាំឆ្នាំដែលបានដាក់ស្នើ  
របស់អាជ្ញាធរសម្រាប់ឆ្នាំសារពើពន្ធ 2027

ផែនការប្រចាំឆ្នាំមានគោលបំណងផ្តល់ការយល់ដឹងអំពីប្រតិបត្តិការ  
និងផែនការរបស់អាជ្ញាធរសម្រាប់ឆ្នាំសារពើពន្ធខាងមុខនេះ

ព្រោះវាប៉ះពាល់ដល់នៅដ្ឋានសាធារណៈដែលជួយដោយរដ្ឋរបស់អាជ្ញាធរ។ ផែនការប្រចាំឆ្នាំដែលបានដាក់ស្នើ  
មានធាតុដូចខាងក្រោម៖

1. ផែនការកែលម្អរដ្ឋធានីដែលបានដាក់ស្នើ (3 ឆ្នាំ)
2. ផែនការជួសជុល និងថែទាំដែលបានដាក់ស្នើ
3. ថវិកាប្រតិបត្តិការបច្ចុប្បន្ន
4. ការឆ្លើយតបនឹងលទ្ធផលនៃការពិនិត្យមើលឡើងវិញនូវការគ្រប់គ្រងការបំពេញការងារ (PMR)
5. បញ្ជីគោលនយោបាយអាជ្ញាធរលំនៅដ្ឋាន
6. បញ្ជីការលះបង់សិទ្ធិពីបទប្បញ្ញត្តិគ្រប់គ្រងរបស់ក្រសួងអភិវឌ្ឍសហគមន៍ និងលំនៅដ្ឋាន (EOHLC)
7. ធាតុផ្សេងទៀត



កាលបរិច្ឆេទ  
និងម៉ោងសវនករ៖  
ទីកន្លែងសវនករ៖

9:00 AM នៅ 7/7/2026

Heaton Court Community Room  
5 Pine St. - Stockbridge, MA 01262

គេហជន និងសាធារណជនទូទៅត្រូវបានអញ្ជើញឱ្យពិនិត្យមើលឡើងវិញនូវផែនការប្រចាំឆ្នាំមុនពេលបើកសវនាការ  
ហើយអាចបញ្ជូនមតិសាធារណៈដូចបានកត់សម្គាល់ខាងក្រោម។

អាជ្ញាធរត្រូវគិតគូរពីកង្វល់នានារបស់អង្គការរបស់អ្នកជួលក្នុងមូលដ្ឋាន (LTO) ឬក្រុមប្រឹក្សាយោបល់គេហជន (RAB)  
អំពីតម្រូវការ និងអាទិភាពនានា ហើយបញ្ឈប់តម្រូវការ និងអាទិភាពទាំងនោះមួយចំនួន

ឬទាំងអស់ទៅក្នុងសេចក្តីព្រាងផែនការ បើអាជ្ញាធរយល់ថាសមស្របជាមួយការគ្រប់គ្រងដែលត្រឹមត្រូវ។ មតិសំខាន់ៗ  
នឹងត្រូវបានសង្ខេប និងបញ្ឈប់ទៅក្នុងផែនការប្រចាំឆ្នាំ នៅពេលវាត្រូវបានដាក់ជូនក្រសួងអភិវឌ្ឍសហគមន៍ និងលំនៅដ្ឋាន  
(EOHLC)។

- សេចក្តីចម្លងនៃផែនការប្រចាំឆ្នាំ មាននៅការិយាល័យរបស់អាជ្ញាធរ ឬអាចពិនិត្យមើលឡើងវិញលើបណ្តាញតាមរយៈ  
<https://publichousingfacilityreview.mass.gov/Public?ap=272>។ មានជាភាសាអង់គ្លេសតែប៉ុណ្ណោះ។
- មតិសាធារណៈអាចត្រូវបានផ្តល់ដោយផ្ទាល់មាត់នៅក្នុងសវនាការ ដោយផ្ញើអ៊ីមែលទៅការិយាល័យអាជ្ញាធរលំនៅដ្ឋាន  
ឬដោយដាក់មតិជាលាយលក្ខណ៍អក្សរនៅការិយាល័យអាជ្ញាធរលំនៅដ្ឋាន។  
មតិសាធារណៈត្រូវតែផ្តល់ឱ្យបានមុនពេលបិទសវនាការសាធារណៈ។
- សម្រាប់សំណើសុំការស្តាប់នៅសមរម្យ សូមទាក់ទងការិយាល័យអាជ្ញាធរលំនៅដ្ឋានត្រឹមថ្ងៃ 7/7/2026 នៅម៉ោង 9:00  
AM។
- ព័ត៌មានទំនាក់ទំនងសម្រាប់ STOCKBRIDGE HOUSING AUTHORITY៖  
ការិយាល័យ៖ 5 Pine Street, P.O. Box 419 Stockbridge, MA 01262  
ទូរស័ព្ទ៖ 413-298-3222  
អ៊ីមែល៖ stockbridgeha@gmail.com

## **Detailed Instructions for Remote Access**

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## Thông báo Điều trần Công khai

### STOCKBRIDGE HOUSING AUTHORITY

xin mời tất cả những người thuê nhà và cộng đồng đến tham dự buổi đánh giá Kế hoạch Hàng năm Đề xuất cho Năm Tài chính của Cơ quan Quản lý 2027

Kế hoạch Hàng năm này nhằm đem lại cái nhìn sâu sắc đối với các hoạt động của Cơ quan Quản lý và các kế hoạch cho năm tài chính sắp tới vì chúng ảnh hưởng đến vấn đề gia cư công cộng có sự trợ giúp của tiểu bang của Cơ quan Quản lý. Kế hoạch Hàng năm Đề xuất bao gồm các thành phần sau:

1. Kế hoạch Cải tạo Cơ bản Đề xuất (3 năm)
2. Kế hoạch Bảo trì và Sửa chữa Đề xuất
3. Ngân sách Vận hành Hiện tại
4. Trả lời đối với những phát hiện trong bản Đánh giá Quản lý Hoạt động (PMR)
5. Danh sách các chính sách của cơ quan quản lý gia cư
6. Danh sách các quyết định miễn tuân thủ các quy định chi phối của Sở Gia cư và Phát triển Cộng đồng (EOHLC)
7. Các thành phần khác



Ngày và giờ điều trần: 9:00 AM và 7/7/2026  
Địa điểm điều trần: Heaton Court Community Room  
5 Pine St. - Stockbridge, MA 01262

Các cư dân và cộng đồng được mời tham gia xem xét Kế hoạch Hàng năm trước phiên điều trần và có thể gửi ý kiến đóng góp của công chúng như được mô tả dưới đây. Cơ quan Quản lý phải cân nhắc các quan ngại của bất kỳ Tổ chức của Người Thuê nhà Địa phương (LTO) hay Hội đồng Cố vấn Cư dân (RAB) nào về các nhu cầu và ưu tiên và kết hợp một số hoặc tất cả các nhu cầu và ưu tiên đó trong bản thảo kế hoạch nếu Cơ quan Quản lý coi là phù hợp với việc quản lý hợp lý. Các ý kiến đóng góp có cơ sở sẽ được tóm tắt và đưa vào nội dung Kế hoạch Hàng năm khi nộp cho Sở Gia cư và Phát triển Cộng đồng (EOHLC).

- Các bản sao của Kế hoạch Hàng năm sẵn có tại văn phòng Cơ quan Quản lý hoặc quý vị có thể xem trực tuyến tại <https://publichousingfacilityreview.mass.gov/Public?ap=272>. Các bản này chỉ có bằng Tiếng Anh.
- Các ý kiến đóng góp có thể được nộp bằng lời tại buổi điều trần, gửi email cho văn phòng cơ quan quản lý gia cư, hoặc nộp ý kiến bằng văn bản tại văn phòng cơ quan quản lý gia cư. Các ý kiến đóng góp phải được nhận không muộn hơn giờ kết thúc phiên điều trần.
- Để đưa ra các yêu cầu về biện pháp điều chỉnh đặc biệt hợp lý, hãy liên hệ với văn phòng cơ quan quản lý gia cư trước 7/7/2026 lúc 9:00 AM.
- Thông tin liên hệ cho STOCKBRIDGE HOUSING AUTHORITY:  
Văn phòng: 5 Pine Street, P.O. Box 419 Stockbridge, MA 01262  
Điện thoại: 413-298-3222  
Email: stockbridgeha@gmail.com

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# 开公众听证会的通知

## STOCKBRIDGE HOUSING AUTHORITY 邀请所有租户和公众 对本管理局的{ }财政年度建议的《年度计划》进行审查

该《年度计划》旨在深入了解本管理局的运作和下一财政年度的计划，因为它们会影响到管理局的有国家援助的公共住房。建议的年度计划包括以下内容：2027

1. 建议的资本改善计划（3年）
2. 建议的维修计划
3. 当前的运营预算
4. 对绩效管理审查（PMR）调查结果的回应
5. 住房管理局政策一览表
6. 从住房和社区发展部（EOHLC）的法规可豁免的条例清单
7. 其他基本点



听证会时间和日期: 9:00 AM 在 7/7/2026  
听证会地点: Heaton Court Community Room  
5 Pine St. - Stockbridge, MA 01262

请租户和公众在听证会之前审阅《年度计划》，并可以按照以下说明提交公众意见。本管理局将考虑任何地方租户组织（LTO）或居民咨询委员会（RAB）对需求和需优先考虑的事项的关注，并在管理局认为是与明智、稳妥的管理相一致的情况下，将部分或全部此类需求和需优先考虑的事项纳入计划草案。公众的实质性意见会被汇总并纳入《年度计划》，然后被提交给住房和社区发展部（EOHLC）。

- 可以在管理局的办公室获得《年度计划》的副本，或者可以上网进入 <https://publichousingfacilityreview.mass.gov/Public?ap=272> 在线查看。那些副本或网上内容是用英语的。
- 各位要提出评论，可以在听证会上通过口头方式、或通过向住房管理局的办公室发送电子邮件、或在住房管理局的办公室当面提交书面评论。所有评论必须在公众听证会结束之前收到。
- 对于合理的需通融的要求，请在{时间}之前通过9:00 AM 在 7/7/2026 与住房管理局的办公室联系。
- STOCKBRIDGE HOUSING AUTHORITY 的联系方式：  
办公室：5 Pine Street, P.O. Box 419 Stockbridge, MA 01262  
电话：413-298-3222  
电子邮件：stockbridgeha@gmail.com

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## **Aviso de Audiência Pública**

O STOCKBRIDGE HOUSING AUTHORITY  
convida todos os locatários e o público em geral para uma revisão do  
plano anual proposto pela Autoridade para o ano fiscal 2027

O Plano Anual é destinado a fornecer insights sobre as operações e planos da Autoridade para o próximo ano fiscal, uma vez que afetam as habitações públicas da Autoridade. O plano anual proposto é composto pelos seguintes elementos:

1. Plano de melhoria de capital proposto (3 anos)
2. Plano de manutenção e reparação proposto
3. Orçamento operacional atual
4. Respostas aos achados da Revisão de Gerenciamento de Desempenho (PMR)
5. Lista de políticas da autoridade habitacional
6. Lista de isenções de regulamentos aplicáveis do Departamento de Habitação e Desenvolvimento Comunitário (EOHLC)
7. Outros elementos



Data e hora da audiência: 9:00 AM on 7/7/2026

Local da audiência: Heaton Court Community Room  
5 Pine St. - Stockbridge, MA 01262

Os residentes e o público em geral são convidados a revisar o Plano Anual antes da audiência e podem enviar comentários públicos, conforme indicado abaixo. A Autoridade deve considerar as preocupações de qualquer Organização de Locatários Locais (LTO) ou Conselho Consultivo de Residentes (RAB) em relação às necessidades e prioridades e incorporar algumas ou todas essas necessidades e prioridades ao projeto do plano se a Autoridade considerar que é consistente com a boa gestão. Os comentários substanciais serão resumidos e incluídos no Plano Anual quando este for submetido ao Departamento de Habitação e Desenvolvimento Comunitário (EOHLC).

- Cópias do Plano Anual estão disponíveis no escritório da Autoridade ou podem ser analisadas on-line em <https://publichousingfacilityreview.mass.gov/Public?ap=272> . Estas estão apenas no idioma inglês.
- Os comentários podem ser apresentados oralmente na audiência, por e-mail para o escritório da autoridade habitacional ou por escrito para o escritório da autoridade habitacional. Os comentários devem ser recebidos, no máximo, até o encerramento da audiência pública.
- Para solicitações razoáveis de acomodação, entre em contato com o escritório da autoridade habitacional em 7/7/2026 às 9:00 AM.
- Informações de contato para STOCKBRIDGE HOUSING AUTHORITY:  
Escritório: 5 Pine Street, P.O. Box 419 Stockbridge, MA 01262  
Telefone: 413-298-3222  
E-mail: stockbridgeha@gmail.com

## **Detailed Instructions for Remote Access**

Stockbridge Housing is inviting you to a scheduled Zoom meeting TBD

## Уведомление о публичном слушании

### STOCKBRIDGE HOUSING AUTHORITY

приглашает всех жильцов и представителей общественности  
принять участие в рассмотрении предлагаемого Управлением  
Годового плана на фискальный год 2027

Целью Годового плана является представление сведений о деятельности и планах Управления на предстоящий фискальный год в том, что касается предоставления социального жилья Управлением при поддержке государства. Предлагаемый Годовой план включает следующие разделы:

1. Предлагаемый план капитального ремонта (3-летний);
2. Предлагаемый план технического обслуживания и ремонта;
3. Смета текущих расходов;
4. Ответы по результатам оценки организации хозяйственной деятельности (PMR);
5. Список политик Жилищного управления;
6. Список отказов от постановлений Департамента жилищного хозяйства и общественного развития (EOHLC);
7. Другие разделы.



Время слушания: 9:00 AM Дата слушания 7/7/2026  
Место проведения слушания: Heaton Court Community Room  
5 Pine St. - Stockbridge, MA 01262

Жильцы и представители общественности приглашаются принять участие в рассмотрении Годового плана перед началом слушания и могут делать открытые замечания, как указано ниже. Управление рассмотрит замечания Местной жилищной организации (LTO) или Жилищного консультационного совета (RAB), касающиеся потребностей и приоритетов жильцов, и включит все такие приоритеты и потребности или их часть в проект плана, если Управление посчитает, что они соответствуют принципам рационального управления. Содержательные замечания будут резюмированы и включены в Годовой план при его подаче в Департамент жилищного хозяйства и общественного развития (EOHLC).

- Копии Годового плана можно получить в офисе Управления или на сайте: <https://publichousingfacilityreview.mass.gov/Public?ap=272> . Документы доступны только на английском языке.
- Замечания можно сделать устно в ходе слушания, а также отправить их по электронной почте в офис Жилищного управления или оставив их в письменном виде в офисе Управления. Замечания должны быть получены до закрытия публичного слушания.
- Разумные запросы о размещении можно направить в офис Жилищного управления до 7/7/2026 9:00 AM
- Контактная информация STOCKBRIDGE HOUSING AUTHORITY  
Офис: 5 Pine Street, P.O. Box 419 Stockbridge, MA 01262  
Телефон: 413-298-3222  
Адрес эл. почты: stockbridgeha@gmail.com

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## Avi Odisyon Piblik

### STOCKBRIDGE HOUSING AUTHORITY

## ap envite tout lokatè ak piblik la an jeneral nan yon revizyon Plan Anyèl pou Ane Fiskal la ke Administrasyon an Pwopoze 2027

Plan Anyèl la fèt nan entansyon pou bay apèsi sou operasyon Otorite a ak plan pou ane fiskal k ap vini a nan fason k ap afekte lojman piblik Administrasyon ke eta a finanse. Plan Anyèl yo pwopoze a te gen eleman sa yo ladann:

1. Plan Amelyorasyon Kapital yo Pwopoze (3-an)
2. Plan Antretyen ak Reparasyon yo Pwopoze
3. Bidjè Operasyon Aktyèl
4. Rezilta Revizyon Repons Jesyon Pèfòmans lan (Performance Management Review, PMR)
5. Lis règleman administrasyon lojman yo
6. Lis egzonerasyon règlemantasyon k ap fè otorite nan Depatman Lojman ak Devlopman Kominotè a (Executive Office of Housing and Livable Communities, EOHLIC)
7. Lòt eleman yo



Dat ak lè odisyon: 9:00 AM nan dat 7/7/2026  
Adrès odisyon an: Heaton Court Community Room  
5 Pine St. - Stockbridge, MA 01262

N ap envite rezidan yo ak piblik la an jeneral pou vin fè revizyon Plan Anyèl la avan odisyon an epi yo gendwa soumèt kòmantè piblik jan sa note annapre a. Administrasyon an pral konsidere enkyetid nenpòt Òganizasyon Lokatè Lokal (LTO) oswa Komite Konsiltatif Rezidan (Resident Advisory Board, RAB) anrapò ak bezwen preyorite epi enkòpore kèlke nan yo oswa tout nan bezwen sa yo ak priyorite yo nan dokiman plan an si Administrasyon an jije ke sa nesèsè pou on bon jesyon. Y ap fè rezime kòmantè enpòtan yo epi mete yo nan Plan Anyèl la lè yo te soumèt li bay Depatman Lojman ak Devlopman Kominotè (Department of Housing and Community Development, EOHLIC).

- Kopi Plan Anyèl yo disponib nan biwo Administrasyon an oswa w ka revize anliy nan <https://publichousingfacilityreview.mass.gov/Public?ap=272>. Sa yo se nan lang Anglè sèlman.
- Yo gendwa soumèt kòmantè yo vèbalman nan odisyon an, pa imèl bay biwo administrasyon lojman an, oswa nan soumisyon kòmantè ekri w yo nan biwo administrasyon lojman an. Yo ta dwe voye kòmantè yo nan yon moman ki pa pi ta pase odisyon piblik la.
- Pou demand akomodasyon rezonab kontakte biwo administrasyon lojman an kote w ap 7/7/2026 a 9:00 AM.
- Enfòmasyon kontak pou STOCKBRIDGE HOUSING AUTHORITY:  
Biwo: 5 Pine Street, P.O. Box 419 Stockbridge, MA 01262  
Telefòn: 413-298-3222  
Imèl: stockbridgeha@gmail.com

## **Detailed Instructions for Remote Access**

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**STOCKBRIDGE HOUSING AUTHORITY**  
**Proposed Annual Plan for Fiscal Year 2027**  
**For State-Aided Public Housing**

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

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

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

The STOCKBRIDGE 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 | HEATON COURT                  | 7         | 1977       | 51             |
|        | Other   | Other Special Occupancy units | 1         |            | 8              |
| Total  |         |                               | 8         |            | 59             |

**Federally Assisted Developments**

STOCKBRIDGE HOUSING AUTHORITY also manages Federally-assisted public housing developments and/or federal rental subsidy vouchers serving 59 households.

### **LHA Central Office**

STOCKBRIDGE HOUSING AUTHORITY  
5 Pine Street, P.O. Box 419 Stockbridge, MA 01262

Andrea Lindsay, Executive Director  
Phone: 413-298-3222  
Email: stockbridgeha@gmail.com

### **LHA Board of Commissioners**

|                      | <b><u>Role</u></b> | <b><u>Category</u></b> | <b><u>From</u></b> | <b><u>To</u></b> |
|----------------------|--------------------|------------------------|--------------------|------------------|
| Bernard Edmonds      | Member             |                        | 05/20/2025         | 05/19/2030       |
| Beth Bachetti        | Member             |                        | 05/09/2024         | 05/09/2028       |
| Christina McCarthy   | Member             |                        | 05/31/2021         | 05/31/2022       |
| Dawn Anne Rabinowitz | Member             |                        | 05/22/2024         | 05/21/2029       |
| James Welch          | Chair              |                        | 05/18/2021         | 05/17/2026       |

**Plan History**

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

| <b>REQUIREMENT</b> |  | <b>DATE COMPLETED</b> |
|--------------------|--|-----------------------|
| A.                 | Advertise the public hearing on the LHA website.   | 5/19/2026             |
| B.                 | Advertise the public hearing in public postings.   | 5/19/2026             |
| C.                 | Notify all LTOs or RAB (if there is one) of the hearing and provide access to the Proposed Annual Plan.                                | N/A                   |
| D.                 | Post draft AP for tenant and public viewing.   | 5/19/2026             |
| E.                 | Hold quarterly meeting with LTO or RAB to review the draft AP. (Must occur before the LHA Board reviews the Annual Plan.)              | N/A                   |
| F.                 | Annual Plan Hearing. Hosted by the LHA Board, with a quorum of members present. (For Boston, the Administrator will host the hearing.) | 7/7/2026              |
| G.                 | Executive Director presents the Annual Plan to the Board.  | 7/7/2026              |
| H.                 | Board votes to approve the AP. (For Boston Housing Authority, the Administrator approves and submits the AP.)                          | 7/7/2026              |

This Annual Plan (AP) will be reviewed by the Executive Office of Housing and Livable Communities (EOHLC) following the public comment period, the public hearing, and LHA approval.

## **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 |
| 283104          | ARPA FF: Gutter and Downspout Inst                      |                   | \$9,765.00             |
| 283105          | ARPA FF: Bathroom Reno.                                 | STOCKBRIDGE HOUSE | \$127,006.62           |
| 283122          | AIP: 667 Routine Turnovers                              |                   | \$10,200.00            |
| 283089          | 667-Heaton-replace storm doors (phase 1 front doors)    | HEATON COURT      | \$43,295.75            |
| 283094          | Parking lot, walkway resurfacing; site lighting upgrade | HEATON COURT      | \$192,917.68           |
| 283102          | Replace exterior doors adding access switches           | STOCKBRIDGE HOUSE | \$45,850.00            |
| 283103          | ARPA Targeted Award-Stockbridge Fire Alarm Upgrade      | HEATON COURT      | \$2,923.97             |
| 283116          | Tub Cut Out- Accommodation F13 A23                      | HEATON COURT      | \$3,045.00             |
| 283117          | Remove and Replace Exterior Fire Extinguisher Boxes     | HEATON COURT      | \$9,514.29             |
| 283118          | Maintenance Door Replacement                            | HEATON COURT      | \$0.00                 |
| 283119          | Install concrete pads Building E Rear                   | HEATON COURT      | \$30,415.00            |
| 283120          | Deck improvements                                       | STOCKBRIDGE HOUSE | \$6,590.00             |
| 283121          | RA-Floor Replacement                                    | HEATON COURT      | \$5,294.00             |
| 283123          | Unit C24 RA-Accommodations                              | HEATON COURT      | \$9,106.49             |
| 283124          | VUI-Heaton Court Turnovers-FA                           | HEATON COURT      | \$72,369.15            |
| 283125          | Install Exterior Lighting                               | HEATON COURT      | \$40,605.00            |
| 283126          | 667-Heaton-Storm door replacement (phase 2 rear doors)  | HEATON COURT      | \$47,742.00            |
| 283127          | Replace kitchen stoves                                  | HEATON COURT      | \$16,785.00            |
| 283128          | Install tilt in windows to third floor units            | HEATON COURT      | \$40,949.00            |
| 283129          | Remove Carpet-RA request                                | HEATON COURT      | \$10,052.94            |
| 283130          | Replace damaged siding and paint - CPA 2023 phase 3     | HEATON COURT      | \$0.00                 |
| 283131          | Exterior Walkway and Bridge Upgrade                     | HEATON COURT      | \$0.00                 |
| 283132          | Rebuild exterior site components                        | STOCKBRIDGE HOUSE | \$9,048.00             |
| 283133          | VUI-C 21 Renovation-FA                                  | HEATON COURT      | \$42,500.00            |
| 283134          | VUI-D11 & B11 Renovation- Force Account                 | HEATON COURT      | \$53,447.25            |
| Total           |   |                   | \$829,422.14           |

| <b>Proposed Projects</b>   |                                   |                               |                                   |
|--|-----------------------------------|-------------------------------|-----------------------------------|
| <b>FY2027</b>  | <b>Available Formula Funding:</b> |                               | <b>\$130,121.05</b>               |
| <b>Project Title</b>   | <b>Development</b>                | <b>Total Development Cost</b> | <b>Special Award(s) Requested</b> |
| This year's funding is being applied to increased costs for previous projects, with no new projects proposed for this plan year. |                                   |                               |                                   |

| <b>Proposed Projects</b>           |                                     |                               |                     |
|------------------------------------|-------------------------------------|-------------------------------|---------------------|
| <b>FY2028</b>                      | <b>Anticipated Formula Funding:</b> |                               | <b>\$130,121.05</b> |
| <b>Project Title</b>               | <b>Development</b>                  | <b>Total Development Cost</b> |                     |
| SUST-Replace timbers and add trees | HEATON COURT                        | \$57,572.00                   |                     |
| Exterior Trim Replacement-LHA      | HEATON COURT                        | \$11,606.00                   |                     |
| <b>Total</b>                       |                                     | <b>\$69,178.00</b>            |                     |

| <b>Proposed Projects</b>                   |                                     |                               |                     |
|--|-------------------------------------|-------------------------------|---------------------|
| <b>FY2029</b>                              | <b>Anticipated Formula Funding:</b> |                               | <b>\$130,121.05</b> |
| <b>Project Title</b>                       | <b>Development</b>                  | <b>Total Development Cost</b> |                     |
| Bathroom Renovation-B                      | STOCKBRIDGE HOUSE                   | \$42,112.00                   |                     |
| Unit A Kitchen Counters and Cabinets       | STOCKBRIDGE HOUSE                   | \$22,688.00                   |                     |
| Install Concrete Pads Buildings D & F Rear | HEATON COURT                        | \$60,133.00                   |                     |
| <b>Total</b>                               |                                     | <b>\$124,933.00</b>           |                     |

| <b>Years 4 and 5 (reflect estimated annual planning amounts)</b> |                    |                               |
|--|--------------------|-------------------------------|
| <b>FY2030 and FY2031</b>   |                    |                               |
| <b>Project Title</b>   | <b>Development</b> | <b>Total Development Cost</b> |
| Bridge Replacement E & F Buildings                               | HEATON COURT       | \$26,792.00                   |
| Replace exterior stair treads                                    | HEATON COURT       | \$95,502.00                   |
| Deck replacement Phase 1   | HEATON COURT       | \$93,990.00                   |
| 689 Bathroom Renovations Half Bath Unit-A                        | STOCKBRIDGE HOUSE  | \$42,210.00                   |
| <b>Total</b>   |                    | <b>\$258,494.00</b>           |

## 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: Yes

Explanation: SHA has reviewed all current projects seeking to reduce or increase budgets accordingly. We have reduced the backlog of CPS projects as well. We have requested that HLC close a number of completed projects.

### **2. Request for Additional Funding**

Request additional funding from EOHLIC 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: SHA plans to apply for sustainability funds to achieve the removal and replacement of several dead trees that are creating a hazard due to falling limbs. Also, the exterior trim on many buildings is deteriorating and SHA plans to make necessary repairs upgrading to weather resistant material. The projects in our plan reflect these conditions and will reduce hazards and complete much needed upgrades.

### **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: SHA has completed a parking lot project that has improved the overall safety of residents/staff and also the overall condition of the grounds. Several deteriorated exterior doors have been upgraded to improve efficiency as well. There have been many vacant unit turnovers which SHA has utilized capital funds to make necessary modifications and improvements. The current plan focuses on replacing the dead trees as well as the preservation of the buildings by replacing deteriorated exterior trim.

## **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: No

## **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: Yes

Explanation: Buildings D and F have crushed stone with a pallet as a step at the rear entry door of the units which is not safe. One of the units does have a tenant with a wheelchair. The project from CPS, Install Concrete Pads Buildings D & F Rear CPS number 283-667-01-0-26-755 would address these issues and is incorporated in the plan.

## **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: 08/28/2025

Answer: Yes

## **10. Sustainability Program**

Are you requesting Sustainability Funding for any of your projects?

Answer: Yes

If yes, have you engaged with the [Mass Save Low Income](#) (LEAN) Program? If no, please explain why not?

Answer: No

Explanation: Urgency of Project and Why We Are Requesting Funds. Since the Director's arrival at the SHA in 2019, and through our most recent tree removal project, we have had to remove more than ten trees due to disease and decline. In several areas of the property, these trees had been dropping large limbs and damaging vehicles parked below. We still have many additional trees near parking areas and buildings that are either dead or require trimming to remove overhanging branches. We are requesting sustainability funding to help remove these dead and diseased trees and to plant new shade trees to replace those that have been removed

## **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: No

## **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. EOHL/RCAT Assistance**

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

Answer: Yes

Explanation: RCAT-Adam Brassard

RCAT-Hugh Mackay

**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 EOHL Project Manager and RCAT Project Manager and make the necessary changes.

Answer: Yes

**17. Other Comments**

Comments: Attached is our most recent weatherization audit, we are awaiting our funding approval/denial. Also, our request for sustainability funding for removal of dead and diseased trees and replanting of up to 10 shade trees

## **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   | N/A           | N/A   |
| Call LHA at Phone Number | 413-298-3222  | Office hours 9 AM - 2 PM. Mon -<br>Thur Can leave message after hours |
| Other                    | 413-329-6894  | Maintenance Chief's cell phone 24<br>HRS                              |

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 STOCKBRIDGE 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 |

## Normal Maintenance Request Process

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

| METHOD                        | CONTACT INFO.               | TIMES        |
|-------------------------------|-----------------------------|--------------|
| Text Phone Number             | 413-329-6894                | 9 AM to 1 PM |
| Call Answering Service        |                             |              |
| Call Housing Authority Office | 413-298-3222                | 24 Hours     |
| Submit Online at Website      |                             |              |
| Email to Following Email      | andrea@stockbridgeha.com    | 24 Hours     |
| Other                         | assistant@stockbridgeha.com | 24 Hours     |

## Work Order Management

- A. EOHLC review of this housing authority's operations shows that the authority uses the following system for tracking work orders: PHA Web
- B. We do track deferred maintenance tasks in our work order system.
- C. Our work order process includes the following steps:

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

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

The SHA does not actually print a copy of every work order. They are completed in the work order system and kept electronically. Paper copies can be provided upon request.

### Maintenance Plan Narrative

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

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

We continuously receive positive feedback from our tenants on the maintenance service they receive.

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

No significant changes were made to our maintenance operations during the last year.

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

Our maintenance goals this year are to continue with the siding replacement projects, made possible by CPA funding and HILAPP awards. And to begin our projects that will correct rot and other decay on the porches / patios and bridge areas.

- 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          | \$111,044.00                     | \$20,000.00                      |
| Last Fiscal Year Actual Spending | \$115,907.00                     | \$23,533.00                      |
| Current Fiscal Year Budget       | \$125,496.00                     | \$17,500.00                      |

- E. Unit Turnover Summary

|   |         |
|---|---------|
| # Turnovers Last Fiscal Year                                    | 5       |
| Average time from date vacated to make unit "Maintenance Ready" | 55 days |
| Average time from date vacated to lease up of unit              | 56 days |

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

## Attachments

These items have been prepared by the STOCKBRIDGE 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.

# Work Orders

## Preventative Maintenance Schedule

| Category          | Next Scheduled | Description   | Assigned To      | Dev ID | Location                           | Frequency       | Days To Skip | Month Name |
|-------------------|----------------|---|------------------|--------|------------------------------------|-----------------|--------------|------------|
| Annual Inspection | 6/4/2026       | Truck/car maintenance, oil change, etc.                               | Jamie Shepardson | 667-1  | General Bldg: A<br>5 Pine Street   | Every (nn) days | 180          | N/A        |
|                   | 6/12/2026      | Annual inspection of housing unit, including inventory of appliances. | Jamie Shepardson | 667-1  | General Bldg: D<br>5 Pine Street   | Every (nn) days | 365          | N/A        |
|                   | 7/31/2026      | Change batteries in electrified doors.                                | Jamie Shepardson | 667-1  | General Bldg: G<br>5 Pine Street   | Every (nn) days | 365          | N/A        |
|                   | 8/14/2026      | Annual inspection of housing unit, including inventory of appliances. | Jamie Shepardson | 667-1  | General Bldg: E<br>5 Pine Street   | Every (nn) days | 365          | N/A        |
|                   | 9/15/2026      | Recaulk all sinks, tubs and showers                                   | Jamie Shepardson | 689    | General Bldg: 689<br>7 Pine Street | Annually        | 0            | N/A        |
|                   | 9/15/2026      | Recaulk all sinks, tubs / showers                                     | Jamie Shepardson | 689    | General Bldg: 689<br>7 Pine Street | Annually        | 0            | N/A        |
|                   | 9/18/2026      | Annual inspection of housing unit, including inventory of appliances. | Jamie Shepardson | 667-1  | General Bldg: F<br>5 Pine Street   | Every (nn) days | 365          | N/A        |
|                   | 9/18/2026      | Annual inspection of housing unit, including inventory of appliances. | Jamie Shepardson | 667-1  | General Bldg: G<br>5 Pine Street   | Every (nn) days | 365          | N/A        |
|                   | 11/1/2026      | Snowblowers routine maintenance, oil, filters, etc.                   | Jamie Shepardson | 667-1  | General Bldg: A<br>5 Pine Street   | Annually        | 0            | N/A        |
|                   | 11/1/2026      | Inspect and Test Hydrants on Heaton Court and 689 Property            | Jamie Shepardson | 667-1  | General Bldg: A<br>5 Pine Street   | Annually        | 0            | N/A        |
|                   | 11/15/2026     | Attach plows to trucks  | Jamie Shepardson | 667-1  | General Bldg: A<br>5 Pine Street   | Annually        | 0            | N/A        |
|                   | 2/6/2027       | Annual inspection of housing unit, including inventory of appliances. | Jamie Shepardson | 667-1  | General Bldg: A<br>5 Pine Street   | Every (nn) days | 365          | N/A        |
|                   | 3/20/2027      | Annual inspection of housing unit, including inventory of appliances. | Jamie Shepardson | 667-1  | General Bldg: B<br>5 Pine Street   | Every (nn) days | 365          | N/A        |
|                   | 4/1/2027       | Lawnmower routine maintenance/oil change/filters, etc.                | Jamie Shepardson | 667-1  | General Bldg: A<br>5 Pine Street   | Annually        | 0            | N/A        |

# Work Orders

## Preventative Maintenance Schedule

|                                 |           |  |                  |       |                                  |                 |     |     |
|---------------------------------|-----------|--|------------------|-------|----------------------------------|-----------------|-----|-----|
| Annual Inspection               | 4/3/2027  | Inspect/test domestic water supply   | Jamie Shepardson | 667-1 | General Bldg: A<br>5 Pine Street | Annually        | 0   | N/A |
|                                 | 4/3/2027  | Inspect/clean vents  | Jamie Shepardson | 667-1 | General Bldg: A<br>5 Pine Street | Annually        | 0   | N/A |
|                                 | 4/17/2027 | Annual inspection of housing unit, including inventory of appliances.  | Jamie Shepardson | 667-1 | General Bldg: C<br>5 Pine Street | Every (nn) days | 365 | N/A |
|                                 |           | <b>17 entries listed</b>   |                  |       |                                  |                 |     |     |
| Building exterior               | 9/1/2026  | Inspect Building envelope, roofs, siding, flashing, foundation, lighting and pest control concerns   | Jamie Shepardson | 667-1 | General Bldg: B<br>5 Pine Street | Annually        | 0   | N/A |
|                                 | 9/1/2026  | Inspect Building Envelope; roofs, doors and windows, siding, flashing, foundation, lighting and pest control concerns.                             | Jamie Shepardson | 667-1 | General Bldg: C<br>5 Pine Street | Annually        | 0   | N/A |
|                                 | 9/1/2026  | Inspect roofs, windows, doors, siding and flashing, foundation, lighting, and pest control concerns  | Jamie Shepardson | 667-1 | General Bldg: D<br>5 Pine Street | Annually        | 0   | N/A |
|                                 | 9/1/2026  | Inspect Building Envelope; Roofs, windows, doors, siding, flashing, foundation, lighting and pest control concerns.                                | Jamie Shepardson | 667-1 | General Bldg: E<br>5 Pine Street | Annually        | 0   | N/A |
|                                 | 9/1/2026  | Inspect Building Envelope; Roofs, windows, doors, siding, flashing, foundation, lighting and pest control issues                                   | Jamie Shepardson | 667-1 | General Bldg: F<br>5 Pine Street | Annually        | 0   | N/A |
|                                 | 9/1/2026  | Building Envelope Inspection; Roofs, windows, doors, siding, flashing, foundation, lighting and pest control issues.                               | Jamie Shepardson | 667-1 | General Bldg: G<br>5 Pine Street | Annually        | 0   | N/A |
|                                 | 9/15/2026 | 689 Building Envelope Inspection, Roofs, windows and doors, gutters and downspouts, siding, flashing, foundation, lighting and pest control issues | Jamie Shepardson | 689   | General Bldg: A<br>7 Pine Street | Annually        | 0   | N/A |
|                                 |           | <b>7 entries listed</b>  |                  |       |                                  |                 |     |     |
| Emergency Generator - heat only | 7/30/2026 | P.M. w/licensed contractor annually.   | Jamie Shepardson | 667-1 | General 5 Pine Street            | Every (nn) days | 365 | N/A |
|                                 |           | <b>1 entries listed</b>  |                  |       |                                  |                 |     |     |
| Exterior Painting               | 5/30/2026 | Exterior carpentry and painting, as needed.  | Jamie Shepardson | 667-1 | General 5 Pine Street            | Every (nn) days | 365 | N/A |
|                                 |           | <b>1 entries listed</b>  |                  |       |                                  |                 |     |     |

# Work Orders

## Preventative Maintenance Schedule

|                              |           |   |                  |       |                                  |                     |     |     |
|------------------------------|-----------|---|------------------|-------|----------------------------------|---------------------|-----|-----|
| Extermination                | 6/1/2026  | Monthly Inspection / Treatment Orkin Contract 667   | Jamie Shepardson | 667-1 | General Bldg: A<br>5 Pine Street | Monthly - first day | 0   | N/A |
|                              | 6/1/2026  | Monthly inspection / treatment Orkin  | Jamie Shepardson | 667-1 | General Bldg: C<br>5 Pine Street | Monthly - first day | 0   | N/A |
|                              | 6/1/2026  | Monthly Orkin Inspection / Treatment  | Jamie Shepardson | 667-1 | General Bldg: B<br>5 Pine Street | Monthly - first day | 0   | N/A |
|                              | 6/1/2026  | Monthly Orkin Inspection / Treatment  | Jamie Shepardson | 667-1 | General Bldg: D<br>5 Pine Street | Monthly - first day | 0   | N/A |
|                              | 6/1/2026  | Monthly Orkin Extermination / Treatment   | Jamie Shepardson | 667-1 | General Bldg: E<br>5 Pine Street | Monthly - first day | 0   | N/A |
|                              | 6/1/2026  | Monthly Orkin Extermination / Treatment   | Jamie Shepardson | 667-1 | General Bldg: F<br>5 Pine Street | Monthly - first day | 0   | N/A |
|                              | 6/1/2026  | Monthly Extermination / Treatment Orkin   | Jamie Shepardson | 667-1 | General Bldg: G<br>5 Pine Street | Monthly - first day | 0   | N/A |
|                              |           | <b>7 entries listed</b>   |                  |       |                                  |                     |     |     |
| Fire Panel/Smoke/CO s/Alarms |           | 689 Development Annual Inspection of Sprinkler System. DDS contracts themselves, to obtain copy for our file.     | Jamie Shepardson | 689   | General Bldg: A<br>7 Pine Street | Undetermined        | 0   | N/A |
|                              | 5/15/2026 | Check carbon monoxide alarms for proper operability. Change batteries where applicable.                           | Jamie Shepardson | 667-1 | General 5 Pine Street            | Every (nn) days     | 365 | N/A |
|                              | 5/29/2026 | Check carbon monoxide alarms for proper operability. Change batteries where applicable.                           | Jamie Shepardson | 667-1 | General 5 Pine Street            | Every (nn) days     | 365 | N/A |
|                              | 5/30/2026 | Fire alarm system inspected annually by licensed contractor, inc. proper placement, operability of extinguishers. | Jamie Shepardson | 667-1 | General 5 Pine Street            | Every (nn) days     | 365 | N/A |
|                              | 6/26/2026 | Check carbon monoxide alarms for proper operability. Change batteries where applicable.                           | Jamie Shepardson | 667-1 | General 5 Pine Street            | Every (nn) days     | 365 | N/A |
|                              | 7/24/2026 | Check carbon monoxide alarms for proper operability. Change batteries where applicable.                           | Jamie Shepardson | 667-1 | General 5 Pine Street            | Every (nn) days     | 365 | N/A |
|                              | 8/7/2026  | Check carbon monoxide alarms for proper operability. Change batteries where applicable.                           | Jamie Shepardson | 667-1 | General 5 Pine Street            | Every (nn) days     | 365 | N/A |

# Work Orders

## Preventative Maintenance Schedule

|                              |           |  |                  |       |                                    |                     |     |     |
|------------------------------|-----------|--|------------------|-------|------------------------------------|---------------------|-----|-----|
| Fire Panel/Smoke/CO s/Alarms | 8/7/2026  | Check carbon monoxide alarms for proper operability. Change batteries where applicable.  | Jamie Shepardson | 667-1 | General Bldg: A<br>5 Pine Street   | Every (nn) days     | 365 | N/A |
|                              | 5/1/2027  | Check carbon monoxide alarms for proper operability. Change batteries where applicable.  | Jamie Shepardson | 667-1 | General Bldg: A<br>5 Pine Street   | Every (nn) days     | 365 | N/A |
|                              |           | <b>9 entries listed</b>  |                  |       |                                    |                     |     |     |
| General maintenance          | 4/27/2026 | Trash removal  | Jamie Shepardson | 667-1 | General Bldg: A<br>5 Pine Street   | Weekly - first day  | 0   | N/A |
|                              | 4/27/2026 | Check mechanical rooms.  | Jamie Shepardson | 667-1 | General Bldg: A<br>5 Pine Street   | Weekly - first day  | 0   | N/A |
|                              | 5/4/2026  | Clean community space and office:<br>-laundry room (check/clean dryer vents, drains, etc.)<br>-rest rooms (clean toilets, sinks/counters, floors, restock paper goods)<br>-kitchen (check appliances, check/clean surfaces/appliances)<br>-vacuum all<br>-remove trash/recycling | Jamie Shepardson | 667-1 | General Bldg: A<br>5 Pine Street   | Weekly - first day  | 0   | N/A |
|                              | 5/4/2026  | Check trash rooms for compliance w/state sanitary code, and follow-up as necessary.  | Jamie Shepardson | 667-1 | General Bldg: A<br>5 Pine Street   | Weekly - first day  | 0   | N/A |
|                              |           | <b>4 entries listed</b>  |                  |       |                                    |                     |     |     |
| Grounds/Driveways/Walkways   | 5/14/2026 | Inspect site, including parking areas, sidewalks, walkways, lawns for safety hazards, damage. Also including, catch basins and storm drains, trees and shrubs, gardens.  | Jamie Shepardson | 667-1 | General Bldg: A<br>5 Pine Street   | Every (nn) days     | 90  | N/A |
|                              | 5/28/2026 | Check inventory and re-stock salt and sand, as needed.   | Jamie Shepardson | 667-1 | General Bldg: A<br>5 Pine Street   | Every (nn) days     | 30  | N/A |
|                              | 6/1/2026  | Grounds work as needed to be billed to 689 Program   | Jamie Shepardson | 689   | General Bldg: 689<br>7 Pine Street | Monthly - first day | 0   | N/A |
|                              | 7/15/2026 | 689 - Inspect site, including parking areas, walkways, lawns for safety hazards. Also, catch basins and storm drains, trees shrubs and gardens.  | Jamie Shepardson | 689   | General Bldg: 689<br>7 Pine Street | Every (nn) days     | 90  | N/A |
|                              | 9/1/2026  | Trim hedges outside unit B   | Jamie Shepardson | 689   | General Bldg: 689<br>7 Pine Street | Annually            | 0   | N/A |

# Work Orders

## Preventative Maintenance Schedule

|                            |           |  |                  |       |                                    |                      |     |         |
|----------------------------|-----------|--|------------------|-------|------------------------------------|----------------------|-----|---------|
| Grounds/Driveways/Walkways | 9/1/2026  | Trim shrubs / hedges   | Jamie Shepardson | 689   | General Bldg: 689<br>7 Pine Street | Annually             | 0   | N/A     |
|                            | 1/1/2027  | Maintain Outside grounds etc.  | Jamie Shepardson | 689   | General Bldg: 689<br>7 Pine Street | First day of (month) | 0   | January |
|                            |           | <b>7 entries listed</b>  |                  |       |                                    |                      |     |         |
| Heat/Hot Water/AC          | 7/31/2026 | Change filters in air handler in community building.   | Jamie Shepardson | 667-1 | General<br>5 Pine Street           | Every (nn) days      | 365 | N/A     |
|                            | 8/30/2026 | P.M. w/licensed contractor annually all heat/hot water systems.  | Jamie Shepardson | 667-1 | General<br>5 Pine Street           | Every (nn) days      | 365 | N/A     |
|                            | 8/31/2026 | Annual Inspection / Service 689 of HVAC system   | Jamie Shepardson | 689   | General Bldg: A<br>7 Pine Street   | Annually             | 0   | N/A     |
|                            |           | <b>3 entries listed</b>  |                  |       |                                    |                      |     |         |
| Interior/Exterior Lights   | 7/15/2026 | 689 - Check all emergency lighting and exit signs for proper function, lighting.                                       | Jamie Shepardson | 689   | General Bldg: 689<br>7 Pine Street | Every (nn) days      | 90  | N/A     |
|                            | 10/1/2026 | Take down and clean light fixtures as needed.  | Jamie Shepardson | 689   | General Bldg: 689<br>7 Pine Street | Annually             | 0   | N/A     |
|                            | 10/1/2026 | Take down and clean interior light fixtures.   | Jamie Shepardson | 689   | General Bldg: 689<br>7 Pine Street | Annually             | 0   | N/A     |
|                            | 11/4/2026 | Adjust timers on exterior lights (Daylight Savings Time)   | Jamie Shepardson | 667-1 | General<br>5 Pine Street           | Annually             | 0   | N/A     |
|                            | 3/11/2027 | Adjust exterior light timers (Daylight Savings Time)   | Jamie Shepardson | 667-1 | General Bldg: A<br>5 Pine Street   | Annually             | 0   | N/A     |
|                            |           | <b>5 entries listed</b>  |                  |       |                                    |                      |     |         |
| Inventory                  | 5/1/2026  | Check cleaning supply and small parts inventory and restock as necessary.  | Jamie Shepardson | 667-1 | General Bldg: A<br>5 Pine Street   | Monthly - first day  | 0   | N/A     |
|                            | 9/29/2026 | Inventory all SHA equipment/tools.   | Amy Bonn         | 667-1 | General<br>5 Pine Street           | Every (nn) days      | 365 | N/A     |
|                            |           | <b>2 entries listed</b>  |                  |       |                                    |                      |     |         |
| Mail                       | 5/8/2026  | Pick up tenant and SHA mail daily Mon-Fri at the post office and distribute in tenant mailboxes and to the SHA office. | Jamie Shepardson | 667-1 | General Bldg: A<br>5 Pine Street   | Weekly - last day    | 0   | N/A     |
|                            |           | <b>1 entries listed</b>  |                  |       |                                    |                      |     |         |

# Work Orders

## Preventative Maintenance Schedule

|                          |           |  |                  |       |                                  |                     |     |     |
|--------------------------|-----------|--|------------------|-------|----------------------------------|---------------------|-----|-----|
| Maintenance Garage       | 5/1/2026  | Fill gas cans as needed, using SHA gas card (per SHA debit card per policy). | Jamie Shepardson | 667-1 | General Bldg: A<br>5 Pine Street | Monthly - first day | 0   | N/A |
|                          | 5/14/2026 | Clean/organize maintenance garage, storage areas.                            | Jamie Shepardson | 667-1 | General<br>5 Pine Street         | Every (nn) days     | 90  | N/A |
|                          | 2/1/2027  | Service all machines.Mower,snow blowers,etc....                              | Jamie Shepardson | 667-1 | General Bldg: A<br>5 Pine Street | Annually            | 0   | N/A |
|                          |           | <b>3 entries listed</b>  |                  |       |                                  |                     |     |     |
| Quarterly Inspection     | 5/14/2026 | Inspect exterior of all bldgs for structural integrity.                      | Jamie Shepardson | 667-1 | General<br>5 Pine Street         | Every (nn) days     | 90  | N/A |
|                          | 6/28/2026 | Ck. Sump Pumps Wiring in man hole areas for alarm systems.                   | Jamie Shepardson | 667-1 | General Bldg: A<br>5 Pine Street | Every (nn) days     | 90  | N/A |
|                          |           | <b>2 entries listed</b>  |                  |       |                                  |                     |     |     |
| Roofs/gutters/downspouts | 5/14/2026 | Inspect gutters, downspouts, and splash blocks.                              | Jamie Shepardson | 667-1 | General Bldg: A<br>5 Pine Street | Every (nn) days     | 90  | N/A |
|                          | 7/3/2026  | Check and ensure that gutters/downspouts are running freely.                 | Jamie Shepardson | 667-1 | General<br>5 Pine Street         | Every (nn) days     | 90  | N/A |
|                          |           | <b>2 entries listed</b>  |                  |       |                                  |                     |     |     |
| Sewer                    | 4/29/2027 | P.M. w/licensed contractor annually.   | Jamie Shepardson | 667-1 | General<br>5 Pine Street         | Every (nn) days     | 365 | N/A |
|                          |           | <b>1 entries listed</b>  |                  |       |                                  |                     |     |     |
| Windows/Doors            | 9/13/2026 | Repair, prepare storms for upcoming season.                                  | Jamie Shepardson | 667-1 | General<br>5 Pine Street         | Every (nn) days     | 365 | N/A |
|                          | 3/20/2027 | Repair, prepare screens for upcoming season.                                 | Jamie Shepardson | 667-1 | General Bldg: A<br>5 Pine Street | Every (nn) days     | 365 | N/A |
|                          |           | <b>2 entries listed</b>  |                  |       |                                  |                     |     |     |

# Stockbridge Housing Authority

WRK140

## Deferred Work Order List

### Work Orders Deferred Between 4/1/2019 and 4/30/2026

| Date Deferred | Status   | Work Order # | Scheduled  | Category                                       | Description of Work   | Dev ID | Bldg ID | Unit ID |
|---------------|----------|--------------|------------|--|---|--------|---------|---------|
| 7/17/2019     | Deferred | 2430         | 7/17/2019  | Counters/Closets/Sheetrock/Other               | Kitchen cabinets delaminating - Work Deferred   | 667-1  | E       | 11      |
| 3/25/2020     | Deferred | 2811         | 2/27/2020  | General maintenance                            | Bathroom could use paint touch up. Bleeding thru.<br>Also needs strainer for tub and tooth brush and soap holder removed and area painted and patched.  | 667-1  | A       | 23      |
| 9/16/2024     | Deferred | 5378         | 4/15/2024  | Interior Painting                              | Paint cabinets if time allows.  | 667-1  | C       | 12      |
| 12/13/2024    | Deferred | 5011         | 10/4/2023  | Annual Inspection                              | Laundry room floor is showing signs of wear   | 689    | 689     | 689A    |
| 12/13/2024    | Deferred | 5688         | 9/18/2024  | General maintenance                            | Door or cover needed over stove to close in duct work for fan. Tenant prefers door, and not an emergency. To defer  | 667-1  | F       | 24      |
| 12/16/2024    | Deferred | 3166         | 11/10/2020 | Appliances (Oven-Fridge-Disposal-Dehumidifier) | Stove knobs hard to turn  | 667-1  | E       | 12      |
| 12/27/2024    | Deferred | 3055         | 8/13/2020  | Plumbing Pipes/Toilets/Water Heaters           | Replace flush valve; old style  | 667-1  | F       | 24      |
| 1/2/2025      | Deferred | 3475         | 8/2/2021   | General maintenance                            | Ann's list: Bathroom: Door stopper and vent are rusted<br>Kitchen: Sink door needs to be replaced or painted. Mentions disposal but doesn't say what's wrong with it.<br>Closets: Wants doors instead of drapes | 667-1  | C       | 23      |
| 1/3/2025      | Deferred | 3094         | 9/9/2020   | General maintenance                            | Living Room # 1 - Provide touch up paint for scuffs etc.<br>Bedroom #1 - Provide door stop - missing<br>Bedroom # 3 - Repair wall and cove base trim in closet. Paint.  | 689    | 689     |         |
| 1/8/2025      | Deferred | 4285         | 10/6/2022  | Sinks-Faucets                                  | Inspection followup....Bathroom faucet needs replacing  | 667-1  | F       | 24      |
| 1/13/2025     | Deferred | 5683         | 9/19/2024  | Counters/Closets/Sheetrock/Other               | Kitchen - Cabinets delaminated - previously noted   | 667-1  | F       | 12      |
| 2/3/2025      | Deferred | 2806         | 2/25/2020  | Interior Painting                              | Interior lighting fixtures to be upgraded to LED  | 667-1  | A       | 22      |
| 2/3/2025      | Deferred | 3530         | 7/30/2021  | Heat/Hot Water/AC                              | Heat seems to be on all the time.<br><br>Defer if necessary to the end of August or the beginning of September  | 667-1  | C       | 32      |

# Stockbridge Housing Authority

## Deferred Work Order List

### Work Orders Deferred Between 4/1/2019 and 4/30/2026

| Date Deferred                | Status   | Work Order # | Scheduled | Category                         | Description of Work  | Dev ID | Bldg ID | Unit ID |
|------------------------------|----------|--------------|-----------|----------------------------------|--|--------|---------|---------|
| 4/2/2025                     | Deferred | 3947         | 3/29/2022 | Interior Painting                | Arrange painting of outside wall and ceiling of living room.At a future date.B32                     | 667-1  | B       | 32      |
| 5/27/2025                    | Deferred | 4574         | 3/21/2023 | Interior Painting                | Overall Unit needs painting.<br>Bathroom will be addressed while fan project is being done in unit   | 667-1  | B       | 32      |
| 6/12/2025                    | Deferred | 6178         | 5/30/2025 | Exterior Painting                | Exterior carpentry and painting, as needed.  | 667-1  | A       |         |
| 9/10/2025                    | Deferred | 5581         | 7/29/2024 | Grounds/Driveways/Walkways       | Tree behind Building D dropping large branches.  | 667-1  | D       | 13      |
| 9/30/2025                    | Deferred | 4218         | 8/23/2022 | Floors                           | Floor pulling up around drain in laundry room  | 689    | 689     | 689B    |
| 9/30/2025                    | Deferred | 4296         | 10/7/2022 | Interior/Exterior Lights         | Bathroom Light Fixtures ballist is getting weak.   | 667-1  | A       | 11      |
| 11/7/2025                    | Deferred | 6332         | 8/31/2025 | Annual Inspection                | Power wash and stain deck. CIP for awning funding is approved.<br>See Andrea                         | 689    | 689     | 689B    |
| 12/28/2025                   | Deferred | 3097         | 9/9/2020  | Floors                           | Bathroom B - Tiles on floor / shower area starting to wear, discolor etc.                            | 689    | 689     | 689A    |
| 2/3/2026                     | Deferred | 2446         | 7/18/2019 | Counters/Closets/Sheetrock/Other | Kitchen cabinets (doors?) delaminating<br>To address after all inspections are completed.            | 667-1  | D       | 33      |
| 2/3/2026                     | Deferred | 2515         | 8/22/2019 | Counters/Closets/Sheetrock/Other | Kitchen - minor de-laminating of cabinets<br>To be addressed when all inspections are completed      | 667-1  | F       | 23      |
| 2/3/2026                     | Deferred | 2518         | 8/22/2019 | Counters/Closets/Sheetrock/Other | Kitchen - cabinets/counter tops de-laminating<br>To be addressed after all inspections are completed | 667-1  | F       | 12      |
| 3/10/2026                    | Deferred | 6703         | 3/10/2026 | Counters/Closets/Sheetrock/Other | Replace counters and bottom cabinet doors when funding allows.                                       | 667-1  | A       | 24      |
| <b>25 Work Orders Listed</b> |          |              |           |                                  |  |        |         |         |

## **Annual Operating Budget**

The tables on the following pages show the approved budget and actual income and spending per budget account (row) for the fiscal year ending 9/30/2025. It also shows the approved budget for the current year (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 STOCKBRIDGE HOUSING AUTHORITY operating reserve at the end of fiscal year 2024 was \$163,168.00, which is 70.76% 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 STOCKBRIDGE HOUSING AUTHORITY |  |                              |                              |                              |  |  |
|--|--|------------------------------|------------------------------|------------------------------|--|--|
| <b>REVENUE</b>   |  |                              |                              |                              |  |  |
| 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  | 290,532.00                   | 279,603.00                   | 297,420.00                   | 6.40%                                    | 485.98                                   |
| 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  | 19,270.00                    | 26,184.00                    | 30,612.00                    | 16.90%                                   | 50.02                                    |
| 3400   | Administrative Fee - MRVP                                    | 0.00                         | 0.00                         | 0.00                         | 0.00%                                    | 0.00                                     |
| 3610   | Interest on Investments - Unrestricted                       | 1,129.00                     | 1,059.00                     | 1,129.00                     | 6.60%                                    | 1.84                                     |
| 3611   | Interest on Investments - Restricted                         | 0.00                         | 0.00                         | 0.00                         | 0.00%                                    | 0.00                                     |
| 3690   | Other Revenue  | 1,980.00                     | 1,927.00                     | 1,980.00                     | 2.80%                                    | 3.24                                     |
| 3691   | Other Revenue - Retained                                     | 160,029.00                   | 21,075.00                    | 89,250.00                    | 323.50%                                  | 145.83                                   |
| 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)                             | 88,992.00                    | 82,321.00                    | 115,800.00                   | 40.70%                                   | 189.22                                   |
| 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  | 561,932.00                   | 412,169.00                   | 536,191.00                   | 30.10%                                   | 876.13                                   |

| Consolidated Budget (400-1) for all state-aided 667 (Elderly), 200 (family), and 705 (scattered site family) developments owned by STOCKBRIDGE HOUSING AUTHORITY |   |                              |                              |                              |  |  |
|--|---|------------------------------|------------------------------|------------------------------|--|--|
| <b>EXPENSES</b>  |   |                              |                              |                              |  |  |
| 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                     | 94,658.00                    | 36,260.00                    | 98,370.00                    | 171.30%                                  | 160.74                                   |
| 4120   | Compensated Absences                        | 0.00                         | 0.00                         | 0.00                         | 0.00%                                    | 0.00                                     |
| 4130   | Legal                                       | 3,500.00                     | 2,072.00                     | 3,500.00                     | 68.90%                                   | 5.72                                     |
| 4140   | Members Compensation                        | 0.00                         | 0.00                         | 0.00                         | 0.00%                                    | 0.00                                     |
| 4150   | Travel & Related Expenses                   | 923.00                       | 30.00                        | 2,935.00                     | 9683.30%                                 | 4.80                                     |
| 4170   | Accounting Services                         | 6,008.00                     | 6,209.00                     | 6,323.00                     | 1.80%                                    | 10.33                                    |
| 4171   | Audit Costs                                 | 4,500.00                     | 4,500.00                     | 4,500.00                     | 0.00%                                    | 7.35                                     |
| 4180   | Penalties & Interest                        | 0.00                         | 0.00                         | 0.00                         | 0.00%                                    | 0.00                                     |
| 4190   | Administrative Other                        | 11,717.00                    | 12,871.00                    | 13,862.00                    | 7.70%                                    | 22.65                                    |
| 4191   | Tenant Organization                         | 5,000.00                     | 58,093.00                    | 5,000.00                     | -91.40%                                  | 8.17                                     |
| 4100   | TOTAL ADMINISTRATION                        | 126,306.00                   | 120,035.00                   | 134,490.00                   | 12.00%                                   | 219.75                                   |
| 4310   | Water                                       | 14,646.00                    | 14,628.00                    | 15,517.00                    | 6.10%                                    | 25.35                                    |
| 4320   | Electricity                                 | 33,902.00                    | 33,795.00                    | 36,194.00                    | 7.10%                                    | 59.14                                    |
| 4330   | Gas   | 25,322.00                    | 23,203.00                    | 25,115.00                    | 8.20%                                    | 41.04                                    |
| 4340   | Fuel  | 0.00                         | 0.00                         | 0.00                         | 0.00%                                    | 0.00                                     |
| 4360   | Net Meter Utility Debit/Energy Conservation | 0.00                         | 137.00                       | 0.00                         | -100.00%                                 | 0.00                                     |
| 4390   | Other                                       | 19,270.00                    | 27,650.00                    | 33,120.00                    | 19.80%                                   | 54.12                                    |
| 4391   | Solar Operator Costs                        | 14,550.00                    | 12,720.00                    | 13,229.00                    | 4.00%                                    | 21.62                                    |
| 4392   | Net Meter Utility Credit (Negative Amount)  | -14,550.00                   | -16,467.00                   | -13,229.00                   | -19.70%                                  | -21.62                                   |
| 4300   | TOTAL UTILITIES                             | 93,140.00                    | 95,666.00                    | 109,946.00                   | 14.90%                                   | 179.65                                   |

| Consolidated Budget (400-1) for all state-aided 667 (Elderly), 200 (family), and 705 (scattered site family) developments owned by STOCKBRIDGE HOUSING AUTHORITY |                                       |                              |                              |                              |  |  |
|--|---------------------------------------|------------------------------|------------------------------|------------------------------|--|--|
| <b>EXPENSES</b>  |                                       |                              |                              |                              |  |  |
| 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                     | 68,690.00                    | 64,004.00                    | 80,667.00                    | 26.00%                                   | 131.81                                   |
| 4420   | Materials & Supplies                  | 9,750.00                     | 12,085.00                    | 13,000.00                    | 7.60%                                    | 21.24                                    |
| 4430   | Contract Costs                        | 15,930.00                    | 13,722.00                    | 17,377.00                    | 26.60%                                   | 28.39                                    |
| 4510   | Insurance                             | 20,800.00                    | 18,847.00                    | 21,931.00                    | 16.40%                                   | 35.83                                    |
| 4520   | Payment in Lieu of Taxes              | 0.00                         | 0.00                         | 0.00                         | 0.00%                                    | 0.00                                     |
| 4540   | Employee Benefits                     | 61,691.00                    | 45,684.00                    | 65,079.00                    | 42.50%                                   | 106.34                                   |
| 4541   | Employee Benefits - GASB 45           | 0.00                         | -71,645.00                   | 0.00                         | -100.00%                                 | 0.00                                     |
| 4542   | Pension Expense - GASB 68             | 0.00                         | 335,578.00                   | 0.00                         | -100.00%                                 | 0.00                                     |
| 4570   | Collection Loss                       | 0.00                         | 0.00                         | 0.00                         | 0.00%                                    | 0.00                                     |
| 4571   | Collection Loss - Fraud/Retroactive   | 0.00                         | 0.00                         | 0.00                         | 0.00%                                    | 0.00                                     |
| 4580   | Interest Expense                      | 0.00                         | 0.00                         | 0.00                         | 0.00%                                    | 0.00                                     |
| 4590   | Other General Expense                 | 0.00                         | 0.00                         | 0.00                         | 0.00%                                    | 0.00                                     |
| 4500   | TOTAL GENERAL EXPENSES                | 82,491.00                    | 328,464.00                   | 87,010.00                    | -73.50%                                  | 142.17                                   |
| 4610   | Extraordinary Maintenance             | 16,250.00                    | 4,781.00                     | 20,000.00                    | 318.30%                                  | 32.68                                    |
| 4611   | Equipment Purchases - Non Capitalized | 5,000.00                     | 1,950.00                     | 5,300.00                     | 171.80%                                  | 8.66                                     |
| 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                         | 78,407.00                    | 0.00                         | -100.00%                                 | 0.00                                     |
| 4600   | TOTAL OTHER EXPENSES                  | 21,250.00                    | 85,138.00                    | 25,300.00                    | -70.30%                                  | 41.34                                    |
| 4000   | TOTAL EXPENSES                        | 417,557.00                   | 719,114.00                   | 467,790.00                   | -34.90%                                  | 764.36                                   |

| Consolidated Budget (400-1) for all state-aided 667 (Elderly), 200 (family), and 705 (scattered site family) developments owned by STOCKBRIDGE HOUSING AUTHORITY |                                       |                              |                              |                              |  |  |
|--|---------------------------------------|------------------------------|------------------------------|------------------------------|--|--|
| <b>SUMMARY</b>   |                                       |                              |                              |                              |  |  |
| 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                         | 561,932.00                   | 412,169.00                   | 536,191.00                   | 30.10%                                   | 876.13                                   |
| 4000   | TOTAL EXPENSES                        | 417,557.00                   | 719,114.00                   | 467,790.00                   | -34.90%                                  | 764.36                                   |
| 2700   | NET INCOME (DEFICIT)                  | 144,375.00                   | -306,945.00                  | 68,401.00                    | -122.30%                                 | 111.77                                   |
| 7520   | Replacements of Equip. - Capitalized  | 0.00                         | 0.00                         | 0.00                         | 0.00%                                    | 0.00                                     |
| 7540   | Betterments & Additions - Capitalized | 122,529.00                   | 0.00                         | 60,250.00                    | 100.00%                                  | 98.45                                    |
| 7500   | TOTAL NONOPERATING EXPENDITURES       | 122,529.00                   | 0.00                         | 60,250.00                    | 100.00%                                  | 98.45                                    |
| 7600   | EXCESS REVENUE OVER EXPENSES          | 21,846.00                    | -306,945.00                  | 8,151.00                     | -102.70%                                 | 13.32                                    |

## Explanation of Budget Accounts

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

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

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

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

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

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

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

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

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

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

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

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

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

3802: Operating Subsidy – MRVP/AHVP Landlords:

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

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

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

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

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

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

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

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

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

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

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

4191: Tenant Organization: LTO Funding by the LHA. Upon request the LHA shall fund all LTOs in a city or town at the annual rate of \$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 EOHLIC on a statewide basis. All other necessary insurance policies include: Workers' Compensation, boiler, vehicle liability and owner, etc.

4520: Payments in Lieu of Taxes:

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

**Narrative Responses to the Performance Management Review (PMR) Findings**

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

**Explanation of PMR Criteria Ratings**

| CRITERION                                | DESCRIPTION   |
|--|---|
| <b>Management</b>                        |   |
| Occupancy Rate                           | <p>The rating is calculated using the following formula: (Total Number of Occupied units on Monthly Report divided by (Total Number of Units Minus Units that Received a Waiver Minus Number of Units Vacant less than 30 days on Monthly Report)</p> <ul style="list-style-type: none"> <li>• “No Findings” : Occupancy Rate is at or above 98%</li> <li>• Operational Guidance: Occupancy rate is at 95% up to 97.9%</li> <li>• Corrective Action: Adjusted occupancy rate is less than 95%</li> </ul>  |
| Tenant Accounts Receivable (TAR)         | <p>This criterion calculates the percentage of uncollected rent and related charges owed by starting with the amount reported by the LHA, as uncollected balances for the TAR (Account 1122 from the Balance Sheet) minus Normal Repayment Agreements* divided by Shelter (Tenant) Rent (account 3110 from the Operating Statement)</p> <ul style="list-style-type: none"> <li>• “No Findings” : At or below 2%</li> <li>• “Operational Guidance”: More than 2% , but less than 5%</li> <li>• “Corrective Action”: 5% or more</li> </ul>            |
| Certifications and Reporting Submissions | <p>Housing authorities are required to submit 4 quarterly vacancy certifications by end of the month following quarter end; 4 quarterly operating statements and 4 Tenant Accounts Receivable (TAR) reports within 60 days of quarter end.</p> <ul style="list-style-type: none"> <li>• “No Findings”: At least 11 of the required 12 reports were submitted and at least 9 were submitted on time.</li> <li>• “Operational Guidance”: Less than 11 of the required 12 reports were submitted and/or less than 9 were submitted on time.</li> </ul> |
| Board Member Training                    | <p>Percentage of board members that have completed the mandatory online board member training.</p> <ul style="list-style-type: none"> <li>• “No Findings” : 80% or more completed training</li> <li>• “Operational Guidance” : 60-79.9% completed training</li> <li>• “Corrective Action” : &lt;60 % completed training</li> </ul>  |
| Staff Certifications and Training        | <p>Each LHA must have at least one staff member complete a relevant certification or training During the fiscal year. The number of required trainings varies by LHA size.</p> <ul style="list-style-type: none"> <li>• No Findings: LHAs completed the required number of trainings</li> <li>• Corrective Action: LHAs have not completed any trainings</li> </ul>   |
| Annual Plan (AP) Submitted               | <p>Housing authorities are required to submit an annual plan every year.</p> <ul style="list-style-type: none"> <li>• “No Findings” =Submitted on time</li> <li>• “Operational Guidance” =Up to 45 days late</li> <li>• “Corrective Action” =More than 45 days late</li> </ul>  |

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

| CRITERION                  | DESCRIPTION  |
|----------------------------|--|
| <b>Financial</b>           |  |
| Adjusted Net Income        | <p>The Adjusted Net Income criterion calculation starts with an LHA's Net Income and subtracts Depreciation, GASB 45 (Retirement Costs), GASB 68 (Retirement Costs), Extraordinary Maintenance (maintenance expense outside of routine/ordinary expenses), and Equipment Purchases – Non Capitalized. This Adjusted Net Income amount is then divided by the Total Expenses of the LHA. If this Adjusted Net Income amount is positive, it means underspending and if it is negative it means overspending.</p> <p>Underspending Rating:</p> <ul style="list-style-type: none"> <li>• “No Findings” : 0 to 9.9%</li> <li>• “Operational Guidance”: 10 to 14.9%</li> <li>• “Corrective Action”: 15% or higher</li> </ul> <p>Overspending Rating:</p> <ul style="list-style-type: none"> <li>• “No Findings” : 0 to -4.9%</li> <li>• “Operational Guidance”: -5% to -9.9%</li> <li>• “Corrective Action”: -10% or below</li> </ul> |
| Operating Reserves         | <p>Current Operating Reserve as a percentage of total maximum reserve level. Appropriate reserve level is buffer against any unforeseen events or expenditures.</p> <ul style="list-style-type: none"> <li>• “No Findings” :35%+ of maximum operating reserve</li> <li>• “Operational Guidance”: 20% to 34.9% of maximum operating reserve</li> <li>• “Corrective Action”: &lt;20% of maximum operating reserve</li> </ul>   |
| <b>Capital Planning</b>    |  |
| Capital Spending           | <p>Under the Formula Funding Program (FF), authorities receive undesignated funds to spend on projects in their Capital Improvement Plan. They are rated on the percentage of available funds they have spent over a three-year period</p> <ul style="list-style-type: none"> <li>• “No Findings” = at least 80%</li> <li>• “Operational Guidance” = At least 50%</li> <li>• “Corrective Action” = Less than 50%</li> </ul>  |
| <b>Health &amp; Safety</b> |  |
| Health & safety violations | <p>EOHLC has observed conditions at the LHA's developments and reported health and safety violations. The LHA has certified the number of corrected violations in each category.</p>   |

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

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

## Policies

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

| <b>Policy</b>   | <b>Last Ratified by Board Vote</b> | <b>Notes</b>        |
|---|------------------------------------|---------------------|
| *Capitalization Policy  | 4/5/2022                           |                     |
| *Fair Housing Marketing Plan                                    | 2/6/2024                           |                     |
| *Grievance Policy   | 12/12/2000                         |                     |
| *Language Access Plan   | 4/16/2020                          |                     |
| *Personnel Policy   | 8/11/2022                          |                     |
| *Procurement Policy   | 12/1/2015                          |                     |
| *Reasonable Accommodations Policy                               | 1/11/2022                          |                     |
| *Rent Collection Policy   | 12/1/2015                          |                     |
| Criminal Offender Records Information (CORI) Policy             | 12/11/2012                         |                     |
| Equal Employment Opportunity Policy and Affirmative Action Plan | 7/15/2025                          | And Fair Housing    |
| Investment Policy   | 8/20/2019                          |                     |
| Other – Define in the ‘Notes’ column                            | 3/7/2006                           | Emergency Case Plan |
| Other – Define in the ‘Notes’ column                            | 8/2/2011                           | Emergency Plan      |
| Smoking Policy  | 7/1/2017                           | Addendum to Lease   |

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

**Waivers**

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

| <b>Description</b>                      | <b>Reason</b> | <b>Date Approved by EOHLIC</b> | <b>Date Expired</b> |
|---|---------------|--------------------------------|---------------------|
| Biennial recertification of c.667 rents | Staffing      | 11/10/2025                     |                     |

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

## **Glossary**

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

**AHVP: Alternative Housing Voucher Program**

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

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

**ANUEL:** Allowable Non-Utility Expense Level

**AP: Annual Plan**

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

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

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

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

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

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

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

**CNA:** Capital Needs Assessment

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

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

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

**EOHLC:** Massachusetts Executive Office of Housing and Livable Communities

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

**FF: Formula Funding**

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

**FYE: Fiscal Year End**

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

**HHA:** Host Housing Authority for the RCAT program.

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

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

**LHA: Local Housing Authority**

**LTO:** Local Tenants Organization

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

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

**MOR:** Management and Occupancy Report

**MRVP:** Massachusetts Rental Voucher Program's annual review of each housing authority's performance. It pulls together data on the authority's occupancy rates, tenant accounts receivables, accounts payable, budget variance, operating reserve, capital improvement plan submission, capital spending, annual inspections and work order and maintenance systems to identify and address areas of strength and areas for development. Its goal is to allow EOHLC and the LHA to take a deep dive into the data, lift up best practices, and work together towards improving operations voucher Program.

**PMR:** Performance Management Review

**RCAT:** Regional Capital Assistance Team

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

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

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

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

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

## **Attachments**

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

- Performance Management Review
- Cover sheet for tenant satisfaction surveys

## **Resident Surveys – Background**

Since 2016 EOHLC 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.

# **STOCKBRIDGE HOUSING AUTHORITY**

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

**Fiscal Year End 9/30/2024**

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

# Executive Office of Housing and Livable Communities (EOHLC)

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

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

|                                  |                               |
|----------------------------------|-------------------------------|
| Housing Authority                | STOCKBRIDGE HOUSING AUTHORITY |
| Fiscal Year Ending               | Sep 2024                      |
| Housing Management Specialist    | Carolina Gonzalez             |
| Facilities Management Specialist | Chad Howard                   |

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

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

|          |                               |
|----------|-------------------------------|
| LHA Name | STOCKBRIDGE HOUSING AUTHORITY |
| FYE      | Sep 2024                      |
| HMS Name | Carolina Gonzalez             |
| FMS Name | Chad Howard                   |

| Criteria                         | Rating      |
|----------------------------------|-------------|
| Staff Certification and Training | No Findings |

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

|          |                               |
|----------|-------------------------------|
| LHA Name | STOCKBRIDGE HOUSING AUTHORITY |
| FYE      | Sep 2024                      |
| HMS Name | Carolina Gonzalez             |
| FMS Name | Chad Howard                   |

CFA Submission

Rating: No Findings

Recommendations: 1. No Recommendations

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

|          |                               |
|----------|-------------------------------|
| LHA Name | STOCKBRIDGE HOUSING AUTHORITY |
| FYE      | Sep 2024                      |
| HMS Name | Carolina Gonzalez             |
| FMS Name | Chad Howard                   |

## Occupancy

Rating All: No Findings  
Rating 667: No Findings  
Rating 705: Not Applicable  
Rating 200: Not Applicable

1. No Recommendations

## Tenant Accounts Receivable (TAR)

Rating All: No Findings  
Rating 667: No Findings  
Rating 705: Not Applicable  
Rating 200: Not Applicable

1. No Recommendations

## Board Member Training

Rating: Corrective Action

1. Ensure each board member has a unique email for the board member training.
2. Provide computer guidance as needed to help board members complete the training.
3. "1 of 5 Board Members completed the Board Training. Please refer to PHN 2017-05. All Board Members are required to take the training. Chapter 235 Section 5B states: ...""Upon appointment and reappointment or election and reelection, all members shall complete a training program, as developed by the department, within 90 days of assuming the member's position. Members shall complete a training program every 2 years..."

## Certifications and Reporting Submissions

Rating: Operational Guidance

1. Submit all four quarterly vacancy certifications by the end of the month following the quarter end.

## Annual Plan Submission

Rating: No Findings

1. No Recommendations

## Adjusted Net Income/Revenue

Rating: No Findings

### Revenue

1. No Recommendations

### Expense

#### Salaries

1. No Recommendations

**Legal**

1. No Recommendations

**Utilities**

1. No Recommendations

**Maintenance**

1. No Recommendations

**Other**

1. No Recommendations

**Operating Reserve**

Rating: No Findings

1. No Recommendations

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

|          |                               |
|----------|-------------------------------|
| LHA Name | STOCKBRIDGE HOUSING AUTHORITY |
| FYE      | Sep 2024                      |
| HMS Name | Carolina Gonzalez             |
| FMS Name | Chad Howard                   |

**CHAMP Criteria 1a**

Rating: No Findings

Recommendations: 1. No Recommendations

**CHAMP Criteria 1b**

Rating: Corrective Action

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

**CHAMP Criteria 1c**

Rating: No Findings

Recommendations: 1. No Recommendations

**CHAMP Criteria 2a**

Rating: 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 | STOCKBRIDGE HOUSING AUTHORITY |
| FYE      | Sep 2024                      |
| HMS Name | Carolina Gonzalez             |
| FMS Name | Chad Howard                   |

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

Rating: No Findings

Recommendations: 1. Ensure that all work orders are completed in the appropriate timeframe or appropriately added to the DM/CIP

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: Operational Guidance

Recommendations: 1. Ensure that all work orders are completed in the appropriate timeframe or appropriately added to the DM/CIP

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: Corrective Action

Recommendations: 1. Vacancy turnovers should be completed within 30 calendar days or less. If cannot complete work within 30 days, LHA should contact Housing Management Specialist for a waiver. Use Online Vacancy System to Apply for Waivers (see PHN 2013 - 07) for Waiver Types (if waiver-eligible) See Handout G  
2. Ensure that all Waivers are requested per EOHLC guidance

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: Corrective Action

Recommendations: 1. Ensure that all Emergency Work Orders are created, tracked, and reported per EOHLC guidance  
2. Ensure that all Emergency Work Orders are completed within 48 hours  
3. Refer to Property Maintenance Guide (Pages I-5 to I-10) on Emergencies and System Setup See Handout B  
4. LHA should align work order types, their priorities and a definition of what is considered an emergency with the Property Maintenance Guide (Pages I-5 to I-10) See Handout B + K  
5. Definition of Emergency Work Orders Should Be Conditions (no matter the time of day) which are immediately threatening to the life or safety of your residents, staff, or structures. LHA should create emergency list and distribute to staff and tenants. Produce emergency work orders for any work that is on list and initiate work within 24 to 48 hours. See Handout J

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

Rating: Corrective Action

Recommendations: 1. Ensure that all Tenant Requested Work Orders are created, tracked, and reported per EOHLC guidance  
2. Ensure that all Tenant Requested Work Orders are completed within 14 days or are added to the DM/CIP

### **Health & Safety Deficiencies**

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