Notice of Public Hearing

THE SHREWSBURY HOUSING AUTHORITY
invites all tenants and the general public to a review of the Authority's Proposed Annual Plan for Fiscal Year 2028

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
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: 4:00 PM on 1/12/2027

Hearing location: Community Room
36 North Quinsigamond Avenue
Shrewsbury, MA 01545

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).

- Copies of the Annual Plan are available at the Authority's office or may be reviewed online at https://publichousingfacilityreview.mass.gov/Public?ap=377
- 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.
- For reasonable accommodation requests contact the housing authority office by 1/5/2027 at 4:00 PM
- Contact information for SHREWSBURY HOUSING AUTHORITY:
  Office: 36 North Quinsigamond Avenue Shrewsbury, MA 01545
  Phone: 508-757-0323
  Email: shabergeronk@gmail.com

Detailed Instructions for Remote Access

Aviso de audiencia pública

EL/LA SHREWSBURY 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 2028

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
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:	4:00 PM on 1/12/2027
Lugar de la audiencia:	Community Room 36 North Quinsigamond Avenue Shrewsbury, MA 01545

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).

- 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=377. El Plan está disponible únicamente en inglés.
- 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.
- Si tiene una solicitud razonable en relación con una discapacidad, póngase en contacto con la oficina de la autoridad de vivienda antes del 1/12/2027 a las 4:00 PM.
- Información de contacto de SHREWSBURY HOUSING AUTHORITY:

  Oficina: 36 North Quinsigamond Avenue Shrewsbury, MA 01545

  Teléfono: 508-757-0323

  Correo electrónico: shabergeronk@gmail.com

Detailed Instructions for Remote Access

<u>សេចក្តីជូនដំណឹងអំពីសវនការសាធារណៈ:</u>

SHREWSBURY HOUSING AUTHORITY

អញ្ជើញអ្នកជួល
និងសាធារណជនទូទៅទាំងអស់ឲ្យទៅពិនិត្យមើលឡើងវិញនូវផែនការប្រចាំឆ្នាំដែលបានដាក់ស្នើ
របស់អាជ្ញាធរសម្រាប់ឆ្នាំសារពើពន្ធ 2028

ផែនការប្រចាំឆ្នាំមានគោលបំណងផ្តល់ការយល់ដឹងអំពីប្រតិបត្តិការ
និងផែនការរបស់អាជ្ញាធរសម្រាប់ឆ្នាំសារពើពន្ធខាងមុខនេះ
ព្រោះវាប៉ះពាល់ដល់លំនៅដ្ឋានសាធារណៈដែលជួយដោយរដ្ឋរបស់អាជ្ញាធរ។ ផែនការប្រចាំឆ្នាំដែលបានដាក់ស្នើ
មានធាតុដូចខាងក្រោម៖

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

កាលបរិច្ឆេទ និងម៉ោងសវនការ៖	4:00 PM នៅ 1/12/2027
ទីកន្លែងសវនការ៖	Community Room 36 North Quinsigamond Avenue Shrewsbury, MA 01545

គេហជន និងសាធារណជនទូទៅត្រូវបានអញ្ជើញឱ្យពិនិត្យមើលឡើងវិញនូវផែនការប្រចាំឆ្នាំមុនពេលបើកសវនាការ
ហើយអាចបញ្ចូនមតិសាធារណៈដូចបានកត់សម្គាល់ខាងក្រោម។
អាជ្ញាធរត្រូវគិតគូរពីកង្វល់នានារបស់អង្គការរបស់អ្នកជួលក្នុងមូលដ្ឋាន (LTO) ឬក្រុមប្រឹក្សាយោបល់គេហជន (RAB)
អំពីតម្រូវការ និងអាទិភាពនានា ហើយបញ្ចូលតម្រូវការ និងអាទិភាពទាំងនោះមួយចំនួន
ឬទាំងអស់ទៅក្នុងសេចក្តីព្រាងផែនការ បើអាជ្ញាធរយល់ថាសមស្របជាមួយការគ្រប់គ្រងដែលត្រឹមត្រូវ។ មតិសំខាន់ៗ
នឹងត្រូវបានសង្ខេប និងបញ្ចូលទៅក្នុងផែនការប្រចាំឆ្នាំ នៅពេលវាត្រូវបានដាក់ជូនក្រសួងអភិវឌ្ឍសហគមន៍ និងលំនៅដ្ឋាន
(EOHLC)។

- សេចក្តីចម្លងនៃផែនការប្រចាំឆ្នាំ មាននៅការិយាល័យរបស់អាជ្ញាធរ ឬអាចពិនិត្យមើលឡើងវិញលើបណ្តាញតាមរយៈ: https://publichousingfacilityreview.mass.gov/Public?ap=377។ មានជាភាសាអង់គ្លេសតែប៉ុណ្ណោះ។
- មតិនានាអាចត្រូវបានផ្តល់ដោយផ្ទាល់មាត់នៅក្នុងសវនាការ ដោយផ្ញើអ៊ីមែលទៅការិយាល័យអាជ្ញាធរលំនៅដ្ឋាន
  ឬដោយដាក់មតិជាលាយលក្ខណ៍អក្សរនៅការិយាល័យអាជ្ញាធរលំនៅដ្ឋាន។
  មតិនានាត្រូវតែផ្តល់ឱ្យបានមុនពេលបិទសវនាការសាធារណៈ។
- សម្រាប់សំណើសុំការស្នាក់នៅសមរម្យ សូមទាក់ទងការិយាល័យអាជ្ញាធរលំនៅដ្ឋានត្រឹមថ្ងៃ 1/12/2027 នៅម៉ោង
  4:00 PM។
- ព័ត៌មានទំនាក់ទំនងសម្រាប់ SHREWSBURY HOUSING AUTHORITY៖
  ការិយាល័យ៖ 36 North Quinsigamond Avenue Shrewsbury, MA 01545
  ទូរស័ព្ទ៖ 508-757-0323
  អ៊ីមែល៖ shabergeronk@gmail.com

Detailed Instructions for Remote Access

Thông báo Điều trần Công khai

SHREWSBURY 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 2028

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
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: 4:00 PM và 1/12/2027

Địa điểm điều trần: Community Room
36 North Quinsigamond Avenue
Shrewsbury, MA 01545

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=377. 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 1/12/2027 lúc 4:00 PM.
- Thông tin liên hệ cho SHREWSBURY HOUSING AUTHORITY:
  Văn phòng: 36 North Quinsigamond Avenue Shrewsbury, MA 01545
  Điện thoại: 508-757-0323
  Email: shabergeronk@gmail.com

Detailed Instructions for Remote Access

开公众听证会的通知

SHREWSBURY 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：2028

1.建议的资本改善计划

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: 4:00 PM 在 1/12/2027

听证会地点: Community Room
36 North Quinsigamond Avenue
Shrewsbury, MA 01545

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=377 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4:00 PM 在 1/12/2027 与住房管理局的办公室联系。
- SHREWSBURY HOUSING AUTHORITY 的联系方式：
  办公室：36 North Quinsigamond Avenue Shrewsbury, MA 01545
  电话：508-757-0323
  电子邮件：shabergeronk@gmail.com

Detailed Instructions for Remote Access

Aviso de Audiência Pública

O SHREWSBURY HOUSING AUTHORITY convida todos os locatários e o público em geral para uma revisão do plano anual proposto pela Autoridade para o ano fiscal 2028

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
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:	4:00 PM on 1/12/2027
Local da audiência:	Community Room 36 North Quinsigamond Avenue Shrewsbury, MA 01545

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=377 . 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 1/12/2027 às 4:00 PM.
- Informações de contato para SHREWSBURY HOUSING AUTHORITY:
  Escritório: 36 North Quinsigamond Avenue Shrewsbury, MA 01545
  Telefone: 508-757-0323
  E-mail: shabergeronk@gmail.com

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Уведомление о публичном слушании

SHREWSBURY HOUSING AUTHORITY
приглашает всех жильцов и представителей общественности принять участие в рассмотрении предлагаемого Управлением Годового плана на фискальный год 2028

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 ;
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: 4:00 PM Дата слушания 1/12/2027

Место проведения слушания: Community Room
36 North Quinsigamond Avenue
Shrewsbury, MA 01545

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=377 . 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 1/12/2027 4:00 PM
- Контактная информация SHREWSBURY HOUSING AUTHORITY
  Офис: 36 North Quinsigamond Avenue Shrewsbury, MA 01545
  Телефон: 508-757-0323
  Адрес эл. почты: shabergeronk@gmail.com

Detailed Instructions for Remote Access

Avi Odisyon Piblik

SHREWSBURY HOUSING AUTHORITY
ap envite tout lokatè ak piblik la an jeneral nan yon revizyon Plan Anyèl pou Ane Fiskal la ke Administrasyon an Pwopoze 2028

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
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, EOHLC)
7. Lòt eleman yo

Dat ak lè odisyon: 4:00 PM nan dat 1/12/2027

Adrès odisyon an: Community Room
36 North Quinsigamond Avenue
Shrewsbury, MA 01545

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 nesesè 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, EOHLC).

- Kopi Plan Anyèl yo disponib nan biwo Administrasyon an oswa w ka revize anliy nan https://publichousingfacilityreview.mass.gov/Public?ap=377. 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 1/12/2027 a 4:00 PM.
- Enfòmasyon kontak pou SHREWSBURY HOUSING AUTHORITY:
  Biwo: 36 North Quinsigamond Avenue Shrewsbury, MA 01545
  Telefòn: 508-757-0323
  Imèl: shabergeronk@gmail.com

Detailed Instructions for Remote Access

SHREWSBURY HOUSING AUTHORITY
Proposed Annual Plan for Fiscal Year 2028
For State-Aided Public Housing

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

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

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

The SHREWSBURY HOUSING AUTHORITY's Annual Plan for their 2028 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. Performance 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
667-02	Elderly	ELIZABETH GARDENS	1	1991	36
667-01	Elderly	FRANCIS GARDENS	10	1975	100
	Family	Family units in smaller developments	12		20
	Other	Other Special Occupancy units	4		16
Total			27		172

Federally Assisted Developments

SHREWSBURY HOUSING AUTHORITY also manages Federally-assisted public housing developments and/or federal rental subsidy vouchers serving 276 households.

LHA Central Office

SHREWSBURY HOUSING AUTHORITY
36 North Quinsigamond Avenue Shrewsbury, MA 01545

Kelly Bergeron, Executive Director
Phone: 508-757-0323
Email: shabergeronk@gmail.com

LHA Board of Commissioners

	Role	Category	From	To
Kelly Bergeron	Member		05/01/2026	05/01/2031
Kathy McSweeney	Member		05/01/2018	05/01/2028
Maria Smith	Member		12/08/2020	11/15/2025
Kelly Bergeron	Member		05/01/2026	05/01/2031
Paul Campanillo	Member		05/01/2016	05/01/2029
Richard Ricker	Chair		05/01/2017	05/01/2027
Allen Bishop	Member		05/01/2026	05/01/2031

Plan History

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

REQUIREMENT		DATE COMPLETED
A.	Advertise the public hearing on the LHA website.	11/27/2026
B.	Advertise the public hearing in public postings.	11/27/2026
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.	11/25/2026
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.)	
G.	Executive Director presents the Annual Plan to the Board.	
H.	Board votes to approve the AP. (For Boston Housing Authority, the Administrator approves and submits the AP.)	

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**
271077	Lake St. Driveway Replacements 689-2	Glavin Site	$190,900.00
271091	ARPA FF: New Roofs Francis Gardens 667-1	FRANCIS GARDENS	$367,041.78
271098	Boiler Replacement	Ridgeland Road Family	$77,500.00
271106	Replace Boiler (177 Lake)	Glavin Site	$28,160.00
271108	AIP: 667 Routine Turnovers		$27,200.00
271109	689-3 Component Upgrades	Ridgeland Road Special Needs	$8,293.98
271110	705-1 Component Upgrades	LIBERTY	$7,966.23
271111	Site Improvements 667-1	FRANCIS GARDENS	$91,008.37
271112	705-2 Unit upgrades on Turnover	South Street	$9,594.00
271113	705-3 Unit Upgrades on Turnover	Ridgeland Road Family	$9,770.00
271114	Water Heater Replacement 667-1	FRANCIS GARDENS	$9,985.88
Total			$827,420.24

Proposed Projects			
FY2027		**Available Formula Funding:**	**$241,297.51**
Project Title	**Development**	**Total Development Cost**	**Special Award(s) Requested**
Deck Replacement 667-1	FRANCIS GARDENS	$181,185.00	
Flooring upgrades 689	Glavin Site	$9,972.00	
Total		$191,157.00	

Proposed Projects		
FY2028	**Anticipated Formula Funding:**	**$241,297.51**
Project Title	**Development**	**Total Development Cost**
Window Replacement 667-1	FRANCIS GARDENS	$24,200.00
Window Replacement 667-2	ELIZABETH GARDENS	$24,502.00
Tree Planting	FRANCIS GARDENS	$9,881.00
Decking Replacement/Cleaining	ELIZABETH GARDENS	$30,250.00
Component Replacement on Turnover 667-1	FRANCIS GARDENS	$9,821.00
Component Replacement on Turnover 667-2	ELIZABETH GARDENS	$9,678.00
Total		$108,332.00

Proposed Projects		
FY2029	**Anticipated Formula Funding:**	**$241,297.51**
Project Title	**Development**	**Total Development Cost**
Pavement Replacement 667-1	FRANCIS GARDENS	$183,012.00
Total		$183,012.00

Years 4 (reflect estimated annual planning amounts)		
FY2030		
Project Title	**Development**	**Total Development Cost**
Rear Entry and Storm Door Replacement	FRANCIS GARDENS	$378,125.00
Total		$378,125.00

Years 5 (reflect estimated annual planning amounts)		
FY2031		
Project Title	**Development**	**Total Development Cost**
This year's funding is being applied to increased costs for previous projects, with no new projects proposed for this plan year.		

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: Completed projects have been closed out and any unallocated funds returned to their allotment.

2. Request for Additional Funding

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

3. Overall Goals of the Capital Improvement Plan

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

Explanation: The SHA's goals are to continue to address their heat vulnerability at their developments by replacing roofs (current project), window replacement at two developments, planting of trees, and replacement of entry and storm doors. The 1st year goal is to address the aging decks at their 667-1 site.

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: No major changes

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: No

9. Special Needs Development

A. DMH/DDS Developments

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

Answer: Yes

B. DMH/DDS Projects

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

Service Provider Input Completion Date: 10/19/2026

Answer: No

Explanation: SHA has current paving project waiting to be executed.

10. Sustainability Program

Are you requesting Sustainability Funding for any of your projects?

Answer: No

11. Solar Initiatives

Does your current CIP contain roof replacement projects?

Answer: No

12. Resilience

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

Answer: Yes

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

Answer: Yes

13. Fossil Fuels

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

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

Answer: No

14. Vacant Units

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

Explanation: Component Replacement on turnover projects. They will help bring units back online more quickly.

15. EOHLC/RCAT Assistance

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

Answer: Yes

Explanation: James Turner

16. Certification Statement

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

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

Answer: Yes

17. Other Comments

Comments:

Maintenance and Repair Plan

Maintenance Objective

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

About This Maintenance and Repair Plan

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

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

Classification and Prioritization of Maintenance Tasks

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

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

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

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

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

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

Emergency Request System

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

METHOD	CONTACT INFO.	TIMES
Call Answering Service	508-757-0323	After business hours, and 24 hours on weekends and holidays
Call LHA at Phone Number	508-757-0323	M-F 8:00AM - 4:00PM
Other		

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

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

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

Normal Maintenance Request Process

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

METHOD	CONTACT INFO.	TIMES
Text Phone Number		
Call Answering Service	508-757-0323	After business hours
Call Housing Authority Office	508-757-0323	M-F 8:00AM - 4:00PM
Submit Online at Website		
Email to Following Email		
Other		

Work Order Management

A. EOHLC review of this housing authority's operations shows that the authority uses the following system for tracking work orders: 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.	☑
2	Maintenance Requests logged into the work system	☑
3	Work Orders generated	☑
4	Work Orders assigned	☑
5	Work Orders tracked	☑
6	Work Orders completed/closed out	☑
7	Maintenance Reports or Lists generated	☑

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

Maintenance Plan Narrative

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

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

We have received favorable feedback from all sources including our PMR. The tenants are happy with our maintenance staff as they do a very nice job and turn over units quickly - (usually within 30 days.)

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

We have not made any changes.

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

To continue their excellent customer service for our tenants.

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	$395,376.00	$10,000.00
Last Fiscal Year Actual Spending	$439,493.00	$11,965.00
Current Fiscal Year Budget	$443,891.00	$15,000.00

E. Unit Turnover Summary

# Turnovers Last Fiscal Year	25
Average time from date vacated to make unit "Maintenance Ready"	40 days
Average time from date vacated to lease up of unit	47 days

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

Attachments

These items have been prepared by the SHREWSBURY 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.

Dwelling Unit Inspections Schedule and Checklist														
LHA NAME: Shrewsbury			**DEVELOPMENT: Scatter Sites**											
Pondside Court														
TASK	**Frequency**	**By**	**Jan**	**Feb**	**Mar**	**Apr**	**May**	**Jun**	**Jul**	**Aug**	**Sep**	**Oct**	**Nov**	**Dec**
Holden Street	Annually	Staff						X						
South Street/Liberty Dr.	Annually	Staff						X						
Parker Road	Annually	Staff						X						
Rosedale/Ridgeland Rd.	Annually	Staff							X					
Heat and smoke detectors														
Battery Heat / Smoke Detectors - Inspect Condition	Bi-Annually / Annually	Staff				X						X		
Inspect System Heat detectors (in Units)	Bi-Annually / Annually	Vendor				X						X		
Pest control														
Inspect Unit	Monthly / Quarterly	Vendor	X	X	X	X	X	X	X	X	X	X	X	X
Floors, Ceilings, Walls														
Floors (Wood, Vinyl, Tile)	Bi-Annually / Annually					X					X			
Kitchen fixtures														
KITCHEN - Inspect Appliances	Bi-Annually / Annually	Staff				X					X			
Kitchen, Bath - Cabinets, fixtures	Bi-Annually / Annually	Staff				X					X			
HVAC fixtures														
(Heat Pumps, Bath Fans, Forced Hot Air, Baseboard)														
Fans, Baseboard, Vents - Inspect (dust, debris)	Annually	Staff				X					X			

Routine Maintenance Schedule and Checklist

LHA NAME: Shrewsbury | **DEVELOPMENT: Scatter Sites**

Landscaping and Grounds Routine Maintenance

Building Exterior

TASK	Frequency	By	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Walk property-pick up trash	Daily	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Mow lawn (Mulching lawnmower); edge if needed	Weekly / Seasonal	Staff				X	X	X	X	X	X	X		
Rake leaves (Fall, Spring)	Bi-Annually	Staff			X							X		
Snow (Shovel, Plow), Treat (Walkways)	Daily / Seasonal	Staff	X	X	X								X	X
Seasonal cleaning (Spring and Fall)	Start & End of Season	staff			X							X		

Building Routine Maintenance

Building Interior

TASK	Frequency	By	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Hallways, Stairs, Lobbies, Community Rm - Vacuum carpet, mop floors,	Weekly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Wash windows in public areas	Weekly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Toilets - Clean public toilets/restrooms	Daily / Weekly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Clean Staff toilets/restrooms	Daily / Weekly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Offices- Sweep / Vacuum offices	Weekly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Light Bulbs - Replace if burnt out in common areas and offices	Monthly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Sweep / Mop / Vacuum elevator floors	Daily / Weekly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Trash Chutes, Dumpsters- Clean trash chutes	Daily / Weekly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Clean dumpster areas	Twice a week	Staff	X	X	X	X	X	X	X	X	X	X	X	X

Other Routine Maintenance

Inventory, Meeting, Training, Tools

TASK	Frequency	By	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Maintain Authority inventory	Quarterly	Staff			X			X			X			X
Attend Staff meetings	Quarterly	Staff			X			X			X			X
Attend Training sessions	Annual	Staff										X		
Clean and sharpen tools	Monthly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Sharpen mower blades (after each Mowing)	Weekly / Monthly	Staff				X	X	X	X	X	X			

NOTE:

Routine (and Emergency) Work Orders are generated will be created due to results from Inspections Maintenance Tasks.

Inspections Schedule and Checklist

LHA NAME: Shrewsbury | **DEVELOPMENT: Scatter Sites**

Buildings & Grounds Inspections

TASK	Frequency	By	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Building Envelope														
ROOFS - Sloped/Flat and EPDM/Shingle/Metal	Bi-Annually / Annually	Staff				X						X		
ROOFS - Cracks, water pooling, leaks, flashing	Bi-Annually / Annually	Staff				X						X		
WALLS - Brick, Vinyl, Shingle	Annually	Staff				X								
WINDOWS, DOORS - Seals, Operators	Annually	Staff				X								
DECKS, EXT STAIRS - Wash	Annually	Staff				X								
FOUNDATIONS - Cracks, vent covers	Annually	Staff				X								
Building Interior														
FLOORS - Wood, Vinyl, Carpet	Annually	Staff				X								
CEILINGS	Annually	Staff				X								
WALLS	Annually	Staff				X								
Pest Control														
PEST CONTROL - Pests	Monthly / As Needed	Vendor	X	X	X	X	X	X	X	X	X	X	X	X
Common Kitchen, Laundry														
KITCHEN - Inspect Appliances	Annually	Staff										X		
GAS STOVE - Inspect	Annually	Vendor										X		
Kitchen, Bath - Cabinets, fixtures	Annually	Staff										X		
LAUNDRY - Machines operational	Bi-Annually	Staff				X						X		
Trash / Recycling Room														
Trash Container leaks	Monthly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Trash Chute doors	Monthly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Trash / Recycle Cans	Weekly / Bi-Monthly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Landscaping														
Lawn, Shrubs, Landscape Beds	Annually	Staff				X								
Pest / Disease - Monitor, Integrated Pest Mgmt	Monthly	Vendor			X	X	X	X	X	X	X	X		
Irrigation System														
Heads, Controls - Check	End/Start of Season	Staff				X						X		
Grounds														
Signage - Inspect	Monthly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Walks, Paving, Curbs - Cracks, broken curbs	Monthly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Parking Lot - Cracks, and Water Ponding	Bi-Annually	Staff			X						X			
Fence - Holes, Falling over	Bi-Annually	Staff			X						X			

Mechanical, Electrical Systems Inspections

TASK	Frequency	By	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
HVAC (Heating, Ventilation, Air Conditioning)														
FURNACE, AHU - Condenser clear of leaves and other debris	Bi-Annually	Staff / Vendor				X						X		
FCU, Window AC Filters - Inspect for season	Bi-Annually	Staff				X						X		
Air source Heat Pumps - Check Coil	Monthly	Staff	X	X	X	X	X	X	X	X	X	X	X	X

Co-Gen System - Inspect	Bi-Annually	Vendor				X						X		
Water system														
Inspect - Valves, Pumps	Bi-Annually	Staff					X					X		
Test pressure	Weekly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Plumbing														
Toilets - Leaks	Annually	Staff						X						
Faucets and shut-offs - Leaks	Annually	Staff						X						
Boilers/HW Tanks - Leaks	Quarterly	Staff			X			X			X			X
Pumps - Operating	Monthly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Fire Sprinklers														
Inspect, Test Backflow	Annually	Vendor				X								
Sanitary system														
Inspect - Valves, Pumps	Bi-Annually	Vendor					X					X		
Test system integrity	Annually	Staff / Vendor									X			
Storm drain system														
Inspect - Valves, Pumps	Bi-Annually	Vendor				X						X		
Test system integrity	Annually	Staff / Vendor									X			
Electrical system														
Inspect connections in panels	*AS Needed*	Recommended by DHCDs Handbook. Perform during major work that includes panel changes												
Fire Alarms														
System (Hardwired) - Inspect Common / Public Areas	Bi-Annually	Staff / Vendor				X			X					
System (Hardwired) - FA Panel for Trouble	Annually	Staff / Vendor							X					
Fire Extinguishers - Check Gauge for Replacement need	Annually	Vendor							X					
Generator														
Test	Monthly	Automatic	X	X	X	X	X	X	X	X	X	X	X	X
Emergency Lighting (Not on Generator)														
Inspect and Test	Monthly / Quarterly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
ALL Light Fixtures														
Lighting - Lights working	Monthly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Security systems														
System working	Monthly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Elevator system														
Elevator Equipment	Bi-Annually / Annually	Vendor				X						X		
Test lights	Monthly	Staff / Vendor	X	X	X	X	X	X	X	X	X	X	X	X
Solid waste disposal system														
Compactor machinery, trash Chute	Quarterly	Staff			X			X			X			X
Machine Inspections														
Automobile														
TASK	**Frequency**	**By**	**Jan**	**Feb**	**Mar**	**Apr**	**May**	**Jun**	**Jul**	**Aug**	**Sep**	**Oct**	**Nov**	**Dec**

Check Oil	Weekly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Check tires	Monthly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Check Brakes	Weekly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Registration	Annually **(Varies)**	Staff												
Small Engines														
Check Oil Level	Every 5 Hrs	Staff			X	X	X	X	X	X				
Check Fuel (in Tank and Stored)	After Use, Season End/Start	Staff		X	X	X	X	X	X	X	X			
Inspect Machine / Equipment	Before and after Use	Staff			X	X	X	X	X	X				

NOTE:

Inspections will generate additional Routine (and Emergency) Work Orders.

Preventive Maintenance Schedule and Checklist														
LHA NAME: Shrewsbury			**DEVELOPMENT: Scatter Sites**											
Buildings & Grounds Preventive Maintenance														
Building Envelope														
TASK	**Frequency**	**By**	**Jan**	**Feb**	**Mar**	**Apr**	**May**	**Jun**	**Jul**	**Aug**	**Sep**	**Oct**	**Nov**	**Dec**
SLOPED ROOF - Remove moss, clear debris from gutters/downspouts	Bi-Annually	Staff / Vendor				X						X		
Recaulk roof flashing	Every 2 Yrs / As Needed	Staff / Vendor				X								
WALLS - Repair mortar joints, Replace Bricks (as needed)	Annually / As Needed	Staff / Vendor				X								
WINDOWS - Wash, re-caulk if needed	Annually	Staff / Vendor				X								
DOORS - Wash, check weather stripping, re-paint as needed	Annually	Staff				X								
DECKS, EXT STAIRS - Wash	Annually	Staff				X								
FOUNDATION - Check cracks, vent covers	Annually	Staff				X								
EXTERIOR SURFACES, FIXTURES - Refinish	Every 10yrs	Staff / Vendor				X								
Building Interior														
WOOD FLOORS - Refinish, polish	As Needed	Staff												
VINYL FLOORS - Refinish, polish	As Needed	Staff												
CEILINGS - Refinish	As Needed	Staff / Vendor												
WALLS - Refinish	As Needed	Staff / Vendor												
WALLS - Recaulk (kitchen and bath)	As Needed	Staff /												
FLOORS - Professionally clean common area	Annually	Vendor				X								
WALLS - Wash off hand prints and dirt in high	Weekly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Pest Control														
PEST CONTROL - Notify residents, Apply Chemicals	Monthly / As Needed	Vendor	X	X	X	X	X	X	X	X	X	X	X	X
Common Kitchen, Laundry														
KITCHEN - Clean Range, Microwave, Refrigerator	Monthly / Annually	Staff	X	X	X	X	X	X	X	X	X	X	X	X
GAS STOVE - Valve and line cleaning	Annually	Vendor									X			
LAUNDRY - Wipe surfaces, empty trash, mop floor, clean behind machines, check lint traps and clean as needed	Weekly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
LAUNDRY - Professionally clean dryer vents	Annually	Vendor									X			

Buildings & Grounds Preventive Maintenance														
TASK	**Frequency**	**By**	**Jan**	**Feb**	**Mar**	**Apr**	**May**	**Jun**	**Jul**	**Aug**	**Sep**	**Oct**	**Nov**	**Dec**
Trash / Recycling Room														
Clean, mop floor, wash out containers	Weekly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Cans (Trash / Recycle) - Regualr pickup	Bi-Weekly / Weekly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Landscaping														
Aerate lawn/overseed/top dress with compost	Annually	Staff				X								
Mulch landscape beds	Annually	Staff				X								
Shrubs, Trees (remove broken, dead, deformed branches)	Weekly / Seasonal	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Remove weeds (don't let weeds go to seed)	Daily	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Protect Shrubs (winter)	Seasonally											X	X	
Pest / Disease - Monitor, Integrated Pest Mgmt & Natural Gardening. DON'T use products harmful to environment	Monthly	Staff				X	X	X	X	X	X	X		
Grounds														
Signage - inspect, clean, repair as needed	Monthly	Staff	X	X	X	X	X	X	X	X	X	X	X	X

Walks, Paving, Curbs - monitor, clean, repair as needed	Monthly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Parking Lot - Monitor condition, clean and reseal as needed	Annually	Staff / Vendor									X			
Fence - monitor condition, clean and repaint as needed	Annually	Staff					X							
Mechanical, Electrical Systems Preventive Maintenance														
HVAC (Heating, Ventilation, Air Conditioning)														
TASK	**Frequency**	**By**	**Jan**	**Feb**	**Mar**	**Apr**	**May**	**Jun**	**Jul**	**Aug**	**Sep**	**Oct**	**Nov**	**Dec**
FURNACE, AHU - Filter Changing / Cleaning, Service	Annually	Staff / Vendor									X			
FCU, Window AC Filters, Duct Cleaning - Clean, Replace as needed	Bi-Annually	Staff					X						X	
Air Source Heat Pumps - Check Oil	Monthly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Co-Gen System	Bi-Annually	Vendor					X						X	
Water system														
Test / Check Water Temperatures	Bi-Annually / Annually	Staff					X					X		
Lubricate valves and pumps	Bi-Annually	Staff					X					X		
Clean, Test integrity, Change Washers	Annually	Staff / Vendor									X			
Test pressure	Weekly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Plumbing														
Toilets - check for leaks, running water	Annually	Staff						X						
Faucets and shut-offs - check for leaks, drips	Annually	Staff						X						
Boilers/HW Tanks - Inspect, service	Quarterly	Staff / Vendor			X			X			X			X
Pumps - sump pump in basement, confirm operational	Weekly / Monthly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Fire Sprinklers														
Inspect, Test Backflow	Annually	Vendor						X						
Sanitary system														
Clean, Lubricate valves and pumps	Bi-Annually	Vendor					X					X		
Replace toilet mechanism	Every 5yrs	Staff / Vendor									X			
Test system integrity	Annually	Staff / Vendor									X			
Storm drain system														
Clean, Lubricate valves and pumps	Bi-Annually	Vendor					X					X		
Test system integrity	Annually	Staff / Vendor									X			
Electrical system														
Tighten connections in transformers and junctions	As Needed	Vendor	Recommended by DHCD's Handbook. **However, if this was never performed, then it should be performed by licensed EC after an infrared test by a Testing Company**											
Clean, Test	As Needed	Vendor												
Fire Alarms														
System (Hardwired) - Clean, Test	Annually	Vendor							X					
Fire Extinguishers - Test, Recharge, Replace (if necessary)	Annually	Vendor							X					
Mechanical, Electrical Systems Preventive Maintenance														
Generator														
TASK	**Frequency**	**By**	**Jan**	**Feb**	**Mar**	**Apr**	**May**	**Jun**	**Jul**	**Aug**	**Sep**	**Oct**	**Nov**	**Dec**
Test	Monthly	Automatic	X	X	X	X	X	X	X	X	X	X	X	X
Lubricate	Every 10hrs use	Vendor												
Small Generators	Monthly	Staff	X	X	X	X	X	X	X	X	X	X	X	X

Emergency Lighting (Not on Generator)														
Recharge batteries	Annually	Staff							X					
Test	Monthly / Quarterly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
ALL Light Fixtures														
Lighting - clean fixtures, replace lamps as needed	Monthly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Security systems														
Test system	Monthly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Solid waste disposal system														
Clean compactors, Lubricate machinery	Monthly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Lubricate trash chute doors	Bi-Annually	Staff				X						X		

Dwelling Unit Preventive Maintenance

Heat and smoke detectors														
TASK	**Frequency**	**By**	**Jan**	**Feb**	**Mar**	**Apr**	**May**	**Jun**	**Jul**	**Aug**	**Sep**	**Oct**	**Nov**	**Dec**
Battery Heat / Smoke Detectors - Test, Change batteries	Annually								X					
Test hardwired detectors (with System)	Annually								X					
Pest control														
Notify Residents, Install Chemicals	Monthly / As Needed	Vendor	X	X	X	X	X	X	X	X	X	X	X	X
Floors														
Refinish floors	At Turnover / As Needed													
Ceilings														
Refinish	At Turnover / As Needed													
Walls														
Refinish	At Turnover / As Needed													
Recaulk (kitchen and bath)	At Turnover / As Needed													
Kitchen fixtures														
KITCHEN - Clean Range, Microwave, Refrigerator	Annually										X			
GAS STOVE - Valve and line cleaning	Annually	Vendor									X			
UNIT APPLIANCES - clean interior and exterior, vacuum under and behind	Annually	Resident Staff						X						
HVAC fixtures														
Air Source Heat Pumps - Vacuum, Clean Condenser	Annually	Staff										X		
Unit Forced Hot Water - Check for Air locks, Bleed	Annually	Staff / Vendor									X	X		
Unit Electrical Baseboard - Vacuum around fins	Annually	Resident										X		
Unit Forced Hot Air - Vacuum Vents	Annually	Resident										X		
Unit Bathroom Fans - Inspect, Vacuum, Clean covers	Annually	Resident						X						

Machine Preventive Maintenance

Automobile														
TASK	**Frequency**	**By**	**Jan**	**Feb**	**Mar**	**Apr**	**May**	**Jun**	**Jul**	**Aug**	**Sep**	**Oct**	**Nov**	**Dec**
Lubricate, Change Filters	Per Manufacturers Recommendations	Vendor										X		
Change tires	Rotate Annually	Vendor										X		
Replace brakes, other fixed life parts	Per Manufacturers Recommendations	Vendor										X		
Change brushes on sweepers	Annually	Vendor										X		
Annual Sticker (Vehicles, Trailers)	Annually **(Varies)**	Vendor												
Small Engines														
ALL WORK by Service Contract	Per Manufacturers Recommendations	Vendor										X		
OIL - Check Level , Change, Replace Filter	Per Manufacturers Recommendations	Staff										X		

Air Filter - Replace Foam/Paper Air cleaner	Per Manufacturers Recommendations (OR Every Season)	Staff										X		
Replace Spark Plug, In-line Fuel Filter	Per Manufacturers Recommendations (OR Every 100 Hrs)	Staff										X		
Prep Work Season Start, Season End)	Bi-Annually	Staff			X							X		
Snow Removal and Sanding Equipment	Annually											X		

Routine Maintenance Schedule and Checklist

LHA NAME: Shrewsbury | **DEVELOPMENT: Elizabeth Gardens**

Landscaping and Grounds Routine Maintenance

Building Exterior

TASK	Frequency	By	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Walk property-pick up trash	Daily	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Mow lawn (Mulching lawnmower); edge if needed	Weekly / Seasonal	Staff				X	X	X	X	X	X	X		
Rake leaves (Fall, Spring)	Bi-Annually	Staff			X							X		
Snow (Shovel, Plow), Treat (Walkways)	Daily / Seasonal	Staff	X	X	X								X	X
Seasonal cleaning (Spring and Fall)	Start & End of Season	staff			X							X		

Building Routine Maintenance

Building Interior

TASK	Frequency	By	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Hallways, Stairs, Lobbies, Community Rm - Vacuum carpet, mop floors,	Weekly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Wash windows in public areas	Weekly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Toilets - Clean public toilets/restrooms	Daily / Weekly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Clean Staff toilets/restrooms	Daily / Weekly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Offices- Sweep / Vacuum offices	Weekly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Light Bulbs - Replace if burnt out in common areas and offices	Monthly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Sweep / Mop / Vacuum elevator floors	Daily / Weekly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Trash Chutes, Dumpsters- Clean trash chutes	Daily / Weekly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Clean dumpster areas	Twice a week	Staff	X	X	X	X	X	X	X	X	X	X	X	X

Other Routine Maintenance

Inventory, Meeting, Training, Tools

TASK	Frequency	By	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Maintain Authority inventory	Quarterly	Staff			X			X			X			X
Attend Staff meetings	Quarterly	Staff			X			X			X			X
Attend Training sessions	Annual	Staff										X		
Clean and sharpen tools	Monthly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Sharpen mower blades (after each Mowing)	Weekly / Monthly	Staff				X	X	X	X	X	X			

NOTE:

Routine (and Emergency) Work Orders are generated will be created due to results from Inspections Maintenance Tasks.

Preventive Maintenance Schedule and Checklist

LHA NAME: Shrewsbury | **DEVELOPMENT: Elizabeth Gardens**

Buildings & Grounds Preventive Maintenance

TASK	Frequency	By	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Building Envelope														
SLOPED ROOF - Remove moss, clear debris from gutters/downspouts	Bi-Annually	Staff / Vendor				X						X		
Recaulk roof flashing	Every 2 Yrs / As Needed	Staff / Vendor				X								
WALLS - Repair mortar joints, Replace Bricks (as needed)	Annually / As Needed	Staff / Vendor				X								
WINDOWS - Wash, re-caulk if needed	Annually	Staff / Vendor				X								
DOORS - Wash, check weather stripping, re-paint as needed	Annually	Staff				X								
DECKS, EXT STAIRS - Wash	Annually	Staff				X								
FOUNDATION - Check cracks, vent covers	Annually	Staff				X								
EXTERIOR SURFACES, FIXTURES - Refinish	Every 10yrs	Staff / Vendor				X								
Building Interior														
WOOD FLOORS - Refinish, polish	As Needed	Staff												
VINYL FLOORS - Refinish, polish	As Needed	Staff												
CEILINGS - Refinish	As Needed	Staff / Vendor												
WALLS - Refinish	As Needed	Staff / Vendor												
WALLS - Recaulk (kitchen and bath)	As Needed	Staff /												
FLOORS - Professionally clean common area	Annually	Vendor				X								
WALLS - Wash off hand prints and dirt in high	Weekly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Pest Control														
PEST CONTROL - Notify residents, Apply Chemicals	Monthly / As Needed	Vendor	X	X	X	X	X	X	X	X	X	X	X	X
Common Kitchen, Laundry														
KITCHEN - Clean Range, Microwave, Refrigerator	Monthly / Annually	Staff	X	X	X	X	X	X	X	X	X	X	X	X
GAS STOVE - Valve and line cleaning	Annually	Vendor									X			
LAUNDRY - Wipe surfaces, empty trash, mop floor, clean behind machines, check lint traps and clean as needed	Weekly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
LAUNDRY - Professionally clean dryer vents	Annually	Vendor									X			

Buildings & Grounds Preventive Maintenance

TASK	Frequency	By	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Trash / Recycling Room														
Clean, mop floor, wash out containers	Weekly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Cans (Trash / Recycle) - Regualr pickup	Bi-Weekly / Weekly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Landscaping														
Aerate lawn/overseed/top dress with compost	Annually	Staff				X								
Mulch landscape beds	Annually	Staff				X								
Shrubs, Trees (remove broken, dead, deformed branches)	Weekly / Seasonal	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Remove weeds (don't let weeds go to seed)	Daily	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Protect Shrubs (winter)	Seasonally											X	X	
Pest / Disease - Monitor, Integrated Pest Mgmt & Natural Gardening. DON'T use products harmful to environment	Monthly	Staff				X	X	X	X	X	X	X		
Grounds														
Signage - inspect, clean, repair as needed	Monthly	Staff	X	X	X	X	X	X	X	X	X	X	X	X

Walks, Paving, Curbs - monitor, clean, repair as needed	Monthly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Parking Lot - Monitor condition, clean and reseal as needed	Annually	Staff / Vendor									X			
Fence - monitor condition, clean and repaint as needed	Annually	Staff					X							

Mechanical, Electrical Systems Preventive Maintenance

HVAC (Heating, Ventilation, Air Conditioning)														
TASK	**Frequency**	**By**	**Jan**	**Feb**	**Mar**	**Apr**	**May**	**Jun**	**Jul**	**Aug**	**Sep**	**Oct**	**Nov**	**Dec**
FURNACE, AHU - Filter Changing / Cleaning, Service	Annually	Staff / Vendor									X			
FCU, Window AC Filters, Duct Cleaning - Clean, Replace as needed	Bi-Annually	Staff					X						X	
Air Source Heat Pumps - Check Oil	Monthly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Co-Gen System	Bi-Annually	Vendor					X						X	
Water system														
Test / Check Water Temperatures	Bi-Annually / Annually	Staff					X					X		
Lubricate valves and pumps	Bi-Annually	Staff					X					X		
Clean, Test integrity, Change Washers	Annually	Staff / Vendor									X			
Test pressure	Weekly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Plumbing														
Toilets - check for leaks, running water	Annually	Staff						X						
Faucets and shut-offs - check for leaks, drips	Annually	Staff						X						
Boilers/HW Tanks - Inspect, service	Quarterly	Staff / Vendor			X			X			X			X
Pumps - sump pump in basement, confirm operational	Weekly / Monthly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Fire Sprinklers														
Inspect, Test Backflow	Annually	Vendor						X						
Sanitary system														
Clean, Lubricate valves and pumps	Bi-Annually	Vendor					X					X		
Replace toilet mechanism	Every 5yrs	Staff / Vendor									X			
Test system integrity	Annually	Staff / Vendor									X			
Storm drain system														
Clean, Lubricate valves and pumps	Bi-Annually	Vendor					X					X		
Test system integrity	Annually	Staff / Vendor									X			
Electrical system														
Tighten connections in transformers and junctions	As Needed	Vendor	Recommended by DHCD's Handbook. **However, if this was never performed, then it should be performed by licensed EC after an Infrared test by a Testing Company**											
Clean, Test	As Needed	Vendor												
Fire Alarms														
System (Hardwired) - Clean, Test	Annually	Vendor							X					
Fire Extinguishers - Test, Recharge, Replace (if necessary)	Annually	Vendor							X					

Mechanical, Electrical Systems Preventive Maintenance

Generator														
TASK	**Frequency**	**By**	**Jan**	**Feb**	**Mar**	**Apr**	**May**	**Jun**	**Jul**	**Aug**	**Sep**	**Oct**	**Nov**	**Dec**
Test	Monthly	Automatic	X	X	X	X	X	X	X	X	X	X	X	X
Lubricate	Every 10hrs use	Vendor												
Small Generators	Monthly	Staff	X	X	X	X	X	X	X	X	X	X	X	X

Emergency Lighting (Not on Generator)														
Recharge batteries	Annually	Staff							X					
Test	Monthly / Quarterly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
ALL Light Fixtures														
Lighting - clean fixtures, replace lamps as needed	Monthly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Security systems														
Test system	Monthly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Solid waste disposal system														
Clean compactors, Lubricate machinery	Monthly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Lubricate trash chute doors	Bi-Annually	Staff				X						X		

Dwelling Unit Preventive Maintenance

Heat and smoke detectors

TASK	Frequency	By	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Battery Heat / Smoke Detectors - Test, Change batteries	Annually								X					
Test hardwired detectors (with System)	Annually								X					
Pest control														
Notify Residents, Install Chemicals	Monthly / As Needed	Vendor	X	X	X	X	X	X	X	X	X	X	X	X
Floors														
Refinish floors	At Turnover / As Needed													
Ceilings														
Refinish	At Turnover / As Needed													
Walls														
Refinish	At Turnover / As Needed													
Recaulk (kitchen and bath)	At Turnover / As Needed													
Kitchen fixtures														
KITCHEN - Clean Range, Microwave, Refrigerator	Annually										X			
GAS STOVE - Valve and line cleaning	Annually	Vendor									X			
UNIT APPLIANCES - clean interior and exterior, vacuum under and behind	Annually	Resident Staff						X						
HVAC fixtures														
Air Source Heat Pumps - Vacuum, Clean Condenser	Annually	Staff										X		
Unit Forced Hot Water - Check for Air locks, Bleed	Annually	Staff / Vendor									X	X		
Unit Electrical Baseboard - Vacuum around fins	Annually	Resident										X		
Unit Forced Hot Air - Vacuum Vents	Annually	Resident										X		
Unit Bathroom Fans - Inspect, Vacuum, Clean covers	Annually	Resident						X						

Machine Preventive Maintenance

Automobile

TASK	Frequency	By	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Lubricate, Change Filters	Per Manufacturers Recommendations	Vendor										X		
Change tires	Rotate Annually	Vendor										X		
Replace brakes, other fixed life parts	Per Manufacturers Recommendations	Vendor										X		
Change brushes on sweepers	Annually	Vendor										X		
Annual Sticker (Vehicles, Trailers)	Annually **(Varies)**	Vendor												

Small Engines

ALL WORK by Service Contract	Per Manufacturers Recommendations	Vendor										X		
OIL - Check Level , Change, Replace Filter	Per Manufacturers Recommendations	Staff										X		

Air Filter - Replace Foam/Paper Air cleaner	Per Manufacturers Recommendations (**OR** Every Season)	Staff										X		
Replace Spark Plug, In-line Fuel Filter	Per Manufacturers Recommendations (**OR** Every 100 Hrs)	Staff										X		
Prep Work Season Start, Season End)	Bi-Annually	Staff			X							X		
Snow Removal and Sanding Equipment	Annually											X		

Inspections Schedule and Checklist

LHA NAME: Shrewsbury | **DEVELOPMENT: Elizabeth Gardens**

Buildings & Grounds Inspections

TASK	Frequency	By	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Building Envelope														
ROOFS - Sloped/Flat and EPDM/Shingle/Metal	Bi-Annually / Annually	Staff				X						X		
ROOFS - Cracks, water pooling, leaks, flashing	Bi-Annually / Annually	Staff				X						X		
WALLS - Brick, Vinyl, Shingle	Annually	Staff				X								
WINDOWS, DOORS - Seals, Operators	Annually	Staff				X								
DECKS, EXT STAIRS - Wash	Annually	Staff				X								
FOUNDATIONS - Cracks, vent covers	Annually	Staff				X								
Building Interior														
FLOORS - Wood, Vinyl, Carpet	Annually	Staff				X								
CEILINGS	Annually	Staff				X								
WALLS	Annually	Staff				X								
Pest Control														
PEST CONTROL - Pests	Monthly / As Needed	Vendor	X	X	X	X	X	X	X	X	X	X	X	X
Common Kitchen, Laundry														
KITCHEN - Inspect Appliances	Annually	Staff										X		
GAS STOVE - Inspect	Annually	Vendor										X		
Kitchen, Bath - Cabinets, fixtures	Annually	Staff										X		
LAUNDRY - Machines operational	Bi-Annually	Staff				X						X		
Trash / Recycling Room														
Trash Container leaks	Monthly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Trash Chute doors	Monthly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Trash / Recycle Cans	Weekly / Bi-Monthly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Landscaping														
Lawn, Shrubs, Landscape Beds	Annually	Staff				X								
Pest / Disease - Monitor, Integrated Pest Mgmt	Monthly	Vendor			X	X	X	X	X	X	X	X		
Irrigation System														
Heads, Controls - Check	End/Start of Season	Staff				X						X		
Grounds														
Signage - Inspect	Monthly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Walks, Paving, Curbs - Cracks, broken curbs	Monthly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Parking Lot - Cracks, and Water Ponding	Bi-Annually	Staff			X						X			
Fence - Holes, Falling over	Bi-Annually	Staff			X						X			

Mechanical, Electrical Systems Inspections

TASK	Frequency	By	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
HVAC (Heating, Ventilation, Air Conditioning)														
FURNACE, AHU - Condenser clear of leaves and other debris	Bi-Annually	Staff / Vendor				X						X		
FCU, Window AC Filters - Inspect for season	Bi-Annually	Staff				X						X		
Air source Heat Pumps - Check Coil	Monthly	Staff	X	X	X	X	X	X	X	X	X	X	X	X

Co-Gen System - Inspect	Bi-Annually	Vendor				X						X		
Water system														
Inspect - Valves, Pumps	Bi-Annually	Staff					X					X		
Test pressure	Weekly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Plumbing														
Toilets - Leaks	Annually	Staff						X						
Faucets and shut-offs - Leaks	Annually	Staff						X						
Boilers/HW Tanks - Leaks	Quarterly	Staff			X			X			X			X
Pumps - Operating	Monthly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Fire Sprinklers														
Inspect, Test Backflow	Annually	Vendor				X								
Sanitary system														
Inspect - Valves, Pumps	Bi-Annually	Vendor					X					X		
Test system integrity	Annually	Staff / Vendor									X			
Storm drain system														
Inspect - Valves, Pumps	Bi-Annually	Vendor				X						X		
Test system integrity	Annually	Staff / Vendor									X			
Electrical system														
Inspect connections in panels	*AS Needed*	Recommended by DHCDs Handbook. Perform during major work that includes panel changes												
Fire Alarms														
System (Hardwired) - Inspect Common / Public Areas	Bi-Annually	Staff / Vendor				X			X					
System (Hardwired) - FA Panel for Trouble	Annually	Staff / Vendor							X					
Fire Extinguishers - Check Gauge for Replacement need	Annually	Vendor							X					
Generator														
Test	Monthly	Automatic	X	X	X	X	X	X	X	X	X	X	X	X
Emergency Lighting (Not on Generator)														
Inspect and Test	Monthly / Quarterly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
ALL Light Fixtures														
Lighting - Lights working	Monthly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Security systems														
System working	Monthly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Elevator system														
Elevator Equipment	Bi-Annually / Annually	Vendor				X						X		
Test lights	Monthly	Staff / Vendor	X	X	X	X	X	X	X	X	X	X	X	X
Solid waste disposal system														
Compactor machinery, trash Chute	Quarterly	Staff			X			X			X			X
Machine Inspections														
Automobile														
TASK	**Frequency**	**By**	**Jan**	**Feb**	**Mar**	**Apr**	**May**	**Jun**	**Jul**	**Aug**	**Sep**	**Oct**	**Nov**	**Dec**

Check Oil	Weekly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Check tires	Monthly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Check Brakes	Weekly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Registration	Annually **(Varies)**	Staff												
Small Engines														
Check Oil Level	Every 5 Hrs	Staff			X	X	X	X	X	X				
Check Fuel (in Tank and Stored)	After Use, Season End/Start	Staff		X	X	X	X	X	X	X	X			
Inspect Machine / Equipment	Before and after Use	Staff			X	X	X	X	X	X				

NOTE:

Inspections will generate additional Routine (and Emergency) Work Orders.

Dwelling Unit Inspections Schedule and Checklist														
LHA NAME: Shrewsbury			**DEVELOPMENT: Elizabeth Gardens**											
Pondside Court														
TASK	**Frequency**	**By**	**Jan**	**Feb**	**Mar**	**Apr**	**May**	**Jun**	**Jul**	**Aug**	**Sep**	**Oct**	**Nov**	**Dec**
Buildings 1	Annually	Staff						X						
Heat and smoke detectors														
Battery Heat / Smoke Detectors - Inspect Condition	Bi-Annually / Annually	Staff				X						X		
Inspect System Heat detectors (in Units)	Bi-Annually / Annually	Vendor				X						X		
Pest control														
Inspect Unit	Monthly / Quarterly	Vendor	X	X	X	X	X	X	X	X	X	X	X	X
Floors, Ceilings, Walls														
Floors (Wood, Vinyl, Tile)	Bi-Annually / Annually					X					X			
Kitchen fixtures														
KITCHEN - Inspect Appliances	Bi-Annually / Annually	Staff				X					X			
Kitchen, Bath - Cabinets, fixtures	Bi-Annually / Annually	Staff				X					X			
HVAC fixtures														
(Heat Pumps, Bath Fans, Forced Hot Air, Baseboard)														
Fans, Baseboard, Vents - Inspect (dust, debris)	Annually	Staff				X					X			

Routine Maintenance Schedule and Checklist

LHA NAME: Shrewsbury | **DEVELOPMENT: Francis Gardens**

Landscaping and Grounds Routine Maintenance

Building Exterior

TASK	Frequency	By	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Walk property-pick up trash	Daily	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Mow lawn (Mulching lawnmower); edge if needed	Weekly / Seasonal	Staff				X	X	X	X	X	X	X		
Rake leaves (Fall, Spring)	Bi-Annually	Staff			X							X		
Snow (Shovel, Plow), Treat (Walkways)	Daily / Seasonal	Staff	X	X	X								X	X
Seasonal cleaning (Spring and Fall)	Start & End of Season	staff			X							X		

Building Routine Maintenance

Building Interior

TASK	Frequency	By	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Hallways, Stairs, Lobbies, Community Rm - Vacuum carpet, mop floors,	Weekly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Wash windows in public areas	Weekly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Toilets - Clean public toilets/restrooms	Daily / Weekly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Clean Staff toilets/restrooms	Daily / Weekly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Offices- Sweep / Vacuum offices	Weekly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Light Bulbs - Replace if burnt out in common areas and offices	Monthly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Sweep / Mop / Vacuum elevator floors	Daily / Weekly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Trash Chutes, Dumpsters- Clean trash chutes	Daily / Weekly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Clean dumpster areas	Twice a week	Staff	X	X	X	X	X	X	X	X	X	X	X	X

Other Routine Maintenance

Inventory, Meeting, Training, Tools

TASK	Frequency	By	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Maintain Authority inventory	Quarterly	Staff			X			X			X			X
Attend Staff meetings	Quarterly	Staff			X			X			X			X
Attend Training sessions	Annual	Staff										X		
Clean and sharpen tools	Monthly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Sharpen mower blades (after each Mowing)	Weekly / Monthly	Staff				X	X	X	X	X	X			

NOTE:

Routine (and Emergency) Work Orders are generated will be created due to results from Inspections Maintenance Tasks.

Preventive Maintenance Schedule and Checklist

LHA NAME: Shrewsbury | **DEVELOPMENT: Francis Gardens**

Buildings & Grounds Preventive Maintenance

TASK	Frequency	By	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Building Envelope														
SLOPED ROOF - Remove moss, clear debris from gutters/downspouts	Bi-Annually	Staff / Vendor				X						X		
Recaulk roof flashing	Every 2 Yrs / As Needed	Staff / Vendor				X								
WALLS - Repair mortar joints, Replace Bricks (as needed)	Annually / As Needed	Staff / Vendor				X								
WINDOWS - Wash, re-caulk if needed	Annually	Staff / Vendor				X								
DOORS - Wash, check weather stripping, re-paint as needed	Annually	Staff				X								
DECKS, EXT STAIRS - Wash	Annually	Staff				X								
FOUNDATION - Check cracks, vent covers	Annually	Staff				X								
EXTERIOR SURFACES, FIXTURES - Refinish	Every 10yrs	Staff / Vendor				X								
Building Interior														
WOOD FLOORS - Refinish, polish	As Needed	Staff												
VINYL FLOORS - Refinish, polish	As Needed	Staff												
CEILINGS - Refinish	As Needed	Staff / Vendor												
WALLS - Refinish	As Needed	Staff / Vendor												
WALLS - Recaulk (kitchen and bath)	As Needed	Staff /												
FLOORS - Professionally clean common area	Annually	Vendor				X								
WALLS - Wash off hand prints and dirt in high	Weekly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Pest Control														
PEST CONTROL - Notify residents, Apply Chemicals	Monthly / As Needed	Vendor	X	X	X	X	X	X	X	X	X	X	X	X
Common Kitchen, Laundry														
KITCHEN - Clean Range, Microwave, Refrigerator	Monthly / Annually	Staff	X	X	X	X	X	X	X	X	X	X	X	X
GAS STOVE - Valve and line cleaning	Annually	Vendor									X			
LAUNDRY - Wipe surfaces, empty trash, mop floor, clean behind machines, check lint traps and clean as needed	Weekly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
LAUNDRY - Professionally clean dryer vents	Annually	Vendor									X			

Buildings & Grounds Preventive Maintenance

TASK	Frequency	By	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Trash / Recycling Room														
Clean, mop floor, wash out containers	Weekly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Cans (Trash / Recycle) - Regualr pickup	Bi-Weekly / Weekly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Landscaping														
Aerate lawn/overseed/top dress with compost	Annually	Staff				X								
Mulch landscape beds	Annually	Staff				X								
Shrubs, Trees (remove broken, dead, deformed branches)	Weekly / Seasonal	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Remove weeds (don't let weeds go to seed)	Daily	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Protect Shrubs (winter)	Seasonally											X	X	
Pest / Disease - Monitor, Integrated Pest Mgmt & Natural Gardening. DON'T use products harmful to environment	Monthly	Staff				X	X	X	X	X	X	X		
Grounds														
Signage - inspect, clean, repair as needed	Monthly	Staff	X	X	X	X	X	X	X	X	X	X	X	X

Walks, Paving, Curbs - monitor, clean, repair as needed	Monthly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Parking Lot - Monitor condition, clean and reseal as needed	Annually	Staff / Vendor									X			
Fence - monitor condition, clean and repaint as needed	Annually	Staff					X							
Mechanical, Electrical Systems Preventive Maintenance														
HVAC (Heating, Ventilation, Air Conditioning)														
TASK	**Frequency**	**By**	**Jan**	**Feb**	**Mar**	**Apr**	**May**	**Jun**	**Jul**	**Aug**	**Sep**	**Oct**	**Nov**	**Dec**
FURNACE, AHU - Filter Changing / Cleaning, Service	Annually	Staff / Vendor									X			
FCU, Window AC Filters, Duct Cleaning - Clean, Replace as needed	Bi-Annually	Staff					X						X	
Air Source Heat Pumps - Check Oil	Monthly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Co-Gen System	Bi-Annually	Vendor					X						X	
Water system														
Test / Check Water Temperatures	Bi-Annually / Annually	Staff					X					X		
Lubricate valves and pumps	Bi-Annually	Staff					X					X		
Clean, Test integrity, Change Washers	Annually	Staff / Vendor									X			
Test pressure	Weekly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Plumbing														
Toilets - check for leaks, running water	Annually	Staff						X						
Faucets and shut-offs - check for leaks, drips	Annually	Staff						X						
Boilers/HW Tanks - Inspect, service	Quarterly	Staff / Vendor			X			X			X			X
Pumps - sump pump in basement, confirm operational	Weekly / Monthly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Fire Sprinklers														
Inspect, Test Backflow	Annually	Vendor						X						
Sanitary system														
Clean, Lubricate valves and pumps	Bi-Annually	Vendor					X					X		
Replace toilet mechanism	Every 5yrs	Staff / Vendor									X			
Test system integrity	Annually	Staff / Vendor									X			
Storm drain system														
Clean, Lubricate valves and pumps	Bi-Annually	Vendor					X					X		
Test system integrity	Annually	Staff / Vendor									X			
Electrical system														
Tighten connections in transformers and junctions	As Needed	Vendor	Recommended by DHCD's Handbook. **However, if this was never performed, then it should be performed by licensed EC after an infrared test by a Testing Company**											
Clean, Test	As Needed	Vendor												
Fire Alarms														
System (Hardwired) - Clean, Test	Annually	Vendor							X					
Fire Extinguishers - Test, Recharge, Replace (if necessary)	Annually	Vendor							X					
Mechanical, Electrical Systems Preventive Maintenance														
Generator														
TASK	**Frequency**	**By**	**Jan**	**Feb**	**Mar**	**Apr**	**May**	**Jun**	**Jul**	**Aug**	**Sep**	**Oct**	**Nov**	**Dec**
Test	Monthly	Automatic	X	X	X	X	X	X	X	X	X	X	X	X
Lubricate	Every 10hrs use	Vendor												
Small Generators	Monthly	Staff	X	X	X	X	X	X	X	X	X	X	X	X

Emergency Lighting (Not on Generator)														
Recharge batteries	Annually	Staff							X					
Test	Monthly / Quarterly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
ALL Light Fixtures														
Lighting - clean fixtures, replace lamps as needed	Monthly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Security systems														
Test system	Monthly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Solid waste disposal system														
Clean compactors, Lubricate machinery	Monthly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Lubricate trash chute doors	Bi-Annually	Staff				X						X		

Dwelling Unit Preventive Maintenance

Heat and smoke detectors														
TASK	**Frequency**	**By**	**Jan**	**Feb**	**Mar**	**Apr**	**May**	**Jun**	**Jul**	**Aug**	**Sep**	**Oct**	**Nov**	**Dec**
Battery Heat / Smoke Detectors - Test, Change batteries	Annually								X					
Test hardwired detectors (with System)	Annually								X					
Pest control														
Notify Residents, Install Chemicals	Monthly / As Needed	Vendor	X	X	X	X	X	X	X	X	X	X	X	X
Floors														
Refinish floors	At Turnover / As Needed													
Ceilings														
Refinish	At Turnover / As Needed													
Walls														
Refinish	At Turnover / As Needed													
Recaulk (kitchen and bath)	At Turnover / As Needed													
Kitchen fixtures														
KITCHEN - Clean Range, Microwave, Refrigerator	Annually										X			
GAS STOVE - Valve and line cleaning	Annually	Vendor									X			
UNIT APPLIANCES - clean interior and exterior, vacuum under and behind	Annually	Resident Staff						X						
HVAC fixtures														
Air Source Heat Pumps - Vacuum, Clean Condenser	Annually	Staff										X		
Unit Forced Hot Water - Check for Air locks, Bleed	Annually	Staff / Vendor									X	X		
Unit Electrical Baseboard - Vacuum around fins	Annually	Resident										X		
Unit Forced Hot Air - Vacuum Vents	Annually	Resident										X		
Unit Bathroom Fans - Inspect, Vacuum, Clean covers	Annually	Resident						X						

Machine Preventive Maintenance

Automobile														
TASK	**Frequency**	**By**	**Jan**	**Feb**	**Mar**	**Apr**	**May**	**Jun**	**Jul**	**Aug**	**Sep**	**Oct**	**Nov**	**Dec**
Lubricate, Change Filters	Per Manufacturers Recommendations	Vendor										X		
Change tires	Rotate Annually	Vendor										X		
Replace brakes, other fixed life parts	Per Manufacturers Recommendations	Vendor										X		
Change brushes on sweepers	Annually	Vendor										X		
Annual Sticker (Vehicles, Trailers)	Annually **(Varies)**	Vendor												
Small Engines														
ALL WORK by Service Contract	Per Manufacturers Recommendations	Vendor										X		
OIL - Check Level , Change, Replace Filter	Per Manufacturers Recommendations	Staff										X		

Air Filter - Replace Foam/Paper Air cleaner	Per Manufacturers Recommendations (**OR** Every Season)	Staff										X		
Replace Spark Plug, In-line Fuel Filter	Per Manufacturers Recommendations (**OR** Every 100 Hrs)	Staff										X		
Prep Work Season Start, Season End)	Bi-Annually	Staff			X							X		
Snow Removal and Sanding Equipment	Annually											X		

Inspections Schedule and Checklist

LHA NAME: Shrewsbury | **DEVELOPMENT: Francis Gardens**

Buildings & Grounds Inspections

TASK	Frequency	By	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Building Envelope														
ROOFS - Sloped/Flat and EPDM/Shingle/Metal	Bi-Annually / Annually	Staff				X						X		
ROOFS - Cracks, water pooling, leaks, flashing	Bi-Annually / Annually	Staff				X						X		
WALLS - Brick, Vinyl, Shingle	Annually	Staff				X								
WINDOWS, DOORS - Seals, Operators	Annually	Staff				X								
DECKS, EXT STAIRS - Wash	Annually	Staff				X								
FOUNDATIONS - Cracks, vent covers	Annually	Staff				X								
Building Interior														
FLOORS - Wood, Vinyl, Carpet	Annually	Staff				X								
CEILINGS	Annually	Staff				X								
WALLS	Annually	Staff				X								
Pest Control														
PEST CONTROL - Pests	Monthly / As Needed	Vendor	X	X	X	X	X	X	X	X	X	X	X	X
Common Kitchen, Laundry														
KITCHEN - Inspect Appliances	Annually	Staff										X		
GAS STOVE - Inspect	Annually	Vendor										X		
Kitchen, Bath - Cabinets, fixtures	Annually	Staff										X		
LAUNDRY - Machines operational	Bi-Annually	Staff				X						X		
Trash / Recycling Room														
Trash Container leaks	Monthly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Trash Chute doors	Monthly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Trash / Recycle Cans	Weekly / Bi-Monthly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Landscaping														
Lawn, Shrubs, Landscape Beds	Annually	Staff				X								
Pest / Disease - Monitor, Integrated Pest Mgmt	Monthly	Vendor			X	X	X	X	X	X	X	X		
Irrigation System														
Heads, Controls - Check	End/Start of Season	Staff				X						X		
Grounds														
Signage - Inspect	Monthly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Walks, Paving, Curbs - Cracks, broken curbs	Monthly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Parking Lot - Cracks, and Water Ponding	Bi-Annually	Staff			X						X			
Fence - Holes, Falling over	Bi-Annually	Staff			X						X			

Mechanical, Electrical Systems Inspections

TASK	Frequency	By	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
HVAC (Heating, Ventilation, Air Conditioning)														
FURNACE, AHU - Condenser clear of leaves and other debris	Bi-Annually	Staff / Vendor				X						X		
FCU, Window AC Filters - Inspect for season	Bi-Annually	Staff				X						X		
Air source Heat Pumps - Check Coil	Monthly	Staff	X	X	X	X	X	X	X	X	X	X	X	X

Co-Gen System - Inspect	Bi-Annually	Vendor				X						X		
Water system														
Inspect - Valves, Pumps	Bi-Annually	Staff					X					X		
Test pressure	Weekly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Plumbing														
Toilets - Leaks	Annually	Staff						X						
Faucets and shut-offs - Leaks	Annually	Staff						X						
Boilers/HW Tanks - Leaks	Quarterly	Staff			X			X			X			X
Pumps - Operating	Monthly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Fire Sprinklers														
Inspect, Test Backflow	Annually	Vendor				X								
Sanitary system														
Inspect - Valves, Pumps	Bi-Annually	Vendor					X					X		
Test system integrity	Annually	Staff / Vendor									X			
Storm drain system														
Inspect - Valves, Pumps	Bi-Annually	Vendor				X						X		
Test system integrity	Annually	Staff / Vendor									X			
Electrical system														
Inspect connections in panels	*AS Needed*	Recommended by DHCDs Handbook. Perform during major work that includes panel changes												
Fire Alarms														
System (Hardwired) - Inspect Common / Public Areas	Bi-Annually	Staff / Vendor				X			X					
System (Hardwired) - FA Panel for Trouble	Annually	Staff / Vendor							X					
Fire Extinguishers - Check Gauge for Replacement need	Annually	Vendor							X					
Generator														
Test	Monthly	Automatic	X	X	X	X	X	X	X	X	X	X	X	X
Emergency Lighting (Not on Generator)														
Inspect and Test	Monthly / Quarterly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
ALL Light Fixtures														
Lighting - Lights working	Monthly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Security systems														
System working	Monthly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Elevator system														
Elevator Equipment	Bi-Annually / Annually	Vendor				X						X		
Test lights	Monthly	Staff / Vendor	X	X	X	X	X	X	X	X	X	X	X	X
Solid waste disposal system														
Compactor machinery, trash Chute	Quarterly	Staff			X			X			X			X

Machine Inspections														
Automobile														
TASK	**Frequency**	**By**	**Jan**	**Feb**	**Mar**	**Apr**	**May**	**Jun**	**Jul**	**Aug**	**Sep**	**Oct**	**Nov**	**Dec**
Check Oil	Weekly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Check tires	Monthly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Check Brakes	Weekly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Registration	Annually **(Varies)**	Staff												
Small Engines														
Check Oil Level	Every 5 Hrs	Staff			X	X	X	X	X	X				
Check Fuel (in Tank and Stored)	After Use, Season End/Start	Staff		X	X	X	X	X	X	X	X			
Inspect Machine / Equipment	Before and after Use	Staff			X	X	X	X	X	X				

NOTE:

Inspections will generate additional Routine (and Emergency) Work Orders.

Dwelling Unit Inspections Schedule and Checklist														
LHA NAME: Shrewsbury			**DEVELOPMENT: Francis Gardens**											
Pondside Court														
TASK	**Frequency**	**By**	**Jan**	**Feb**	**Mar**	**Apr**	**May**	**Jun**	**Jul**	**Aug**	**Sep**	**Oct**	**Nov**	**Dec**
Buildings 1 & 2	Annually	Staff				X								
Buildings 3 & 4	Annually	Staff				X								
Buildings 5 & 6	Annually	Staff				X								
Buildings 7 & 8	Annually	Staff				X								
Buildings 9 & 10	Annually	Staff					X							
Heat and smoke detectors														
Battery Heat / Smoke Detectors - Inspect Condition	Bi-Annually / Annually	Staff				X						X		
Inspect System Heat detectors (in Units)	Bi-Annually / Annually	Vendor				X						X		
Pest control														
Inspect Unit	Monthly / Quarterly	Vendor	X	X	X	X	X	X	X	X	X	X	X	X
Floors, Ceilings, Walls														
Floors (Wood, Vinyl, Tile)	Bi-Annually / Annually					X					X			
Kitchen fixtures														
KITCHEN - Inspect Appliances	Bi-Annually / Annually	Staff				X					X			
Kitchen, Bath - Cabinets, fixtures	Bi-Annually / Annually	Staff				X					X			
HVAC fixtures														
(Heat Pumps, Bath Fans, Forced Hot Air, Baseboard)														
Fans, Baseboard, Vents - Inspect (dust, debris)	Annually	Staff				X					X			

Deferred Maintenance Plan

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

Annual Operating Budget

The tables on the following pages show the approved budget and actual income and spending per budget account (row) for the fiscal year ending 3/31/2026. It also shows the approved budget for the current year (2027) 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 SHREWSBURY HOUSING AUTHORITY operating reserve at the end of fiscal year 2026 was $450,057.00, which is
77.65% 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 SHREWSBURY HOUSING AUTHORITY						
REVENUE						
Account Number	Account Class	2026 Approved Revenue Budget	2026 Actual Amounts Received	2027 Approved Revenue Budget	% Change from 2026 Actual to 2027 Budget	2027 Dollars Budgeted Per Unit per Month
3110	Shelter Rent	984,000.00	985,817.00	990,000.00	0.42%	528.85
3111	Shelter Rent - Tenants - Fraud/Retroactive	0.00	0.00	0.00	0.00%	0.00
3115	Shelter Rent - Section 8	0.00	0.00	0.00	0.00%	0.00
3190	Non-Dwelling Rentals	0.00	0.00	0.00	0.00%	0.00
3400	Administrative Fee - MRVP/AHVP	0.00	0.00	0.00	0.00%	0.00
3610	Interest on Investments - Unrestricted	0.00	0.00	0.00	0.00%	0.00
3611	Interest on Investments - Restricted	0.00	0.00	0.00	0.00%	0.00
3690	Other Revenue	6,100.00	7,141.00	6,100.00	-14.57%	3.26
3691	Other Revenue - Retained	0.00	0.00	0.00	0.00%	0.00
3692	Other Revenue - Operating Reserves	0.00	0.00	0.00	0.00%	0.00
3693	Other Revenue - Energy Net Meter	0.00	0.00	0.00	0.00%	0.00
3801	Operating Subsidy - DHCD (400-1)	161,201.00	203,857.00	248,106.00	21.70%	132.54
3802	Operating Subsidy - MRVP/AHVP 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 or Disposition of Property (Capitalized or Non-Capitalized)	0.00	0.00	0.00	0.00%	0.00

Consolidated Budget (400-1) for all state-aided 667 (Elderly), 200 (family), and 705 (scattered site family) developments owned by SHREWSBURY HOUSING AUTHORITY						
EXPENSES						
Account Number	Account Class	2026 Approved Revenue Budget	2026 Actual Amounts Received	2027 Approved Revenue Budget	% Change from 2026 Actual to 2027 Budget	2027 Dollars Budgeted Per Unit per Month
4110	Administrative Salaries	146,195.00	139,445.00	150,101.00	7.64%	80.18
4120	Compensated Absences	0.00	1,588.00	0.00	-100.00%	0.00
4130	Legal Expense	6,500.00	0.00	6,500.00	0.00%	3.47
4140	Compensation to Authority Members	0.00	0.00	0.00	0.00%	0.00
4150	Travel & Related Expenses	2,730.00	722.00	2,730.00	278.11%	1.46
4170	Accounting Services	7,560.00	7,560.00	7,200.00	-4.76%	3.85
4171	Audit Costs	11,590.00	4,833.00	11,590.00	139.80%	6.19
4180	Penalties & Interest	0.00	0.00	0.00	0.00%	0.00
4190	Administrative Other	30,640.00	34,538.00	33,530.00	-2.91%	17.91
4191	Tenant Organization	5,000.00	4,583.00	5,500.00	20.00%	2.94
4310	Water	69,103.00	76,308.00	75,924.00	-0.50%	40.56
4320	Electricity	148,333.00	198,708.00	187,872.00	-5.45%	100.36
4330	Gas	9,541.00	8,794.00	13,035.00	48.22%	6.96
4340	Fuel	0.00	0.00	0.00	0.00%	0.00
4360	Energy Conservation	0.00	0.00	0.00	0.00%	0.00
4390	Other Utilities	1,213.00	0.00	1,213.00	0.00%	0.65
4391	Payment to Solar Operator	0.00	0.00	0.00	0.00%	0.00
4392	Net Meter Utility Credits	0.00	0.00	0.00	0.00%	0.00

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

EXPENSES

Account Number	Account Class	2026 Approved Revenue Budget	2026 Actual Amounts Received	2027 Approved Revenue Budget	% Change from 2026 Actual to 2027 Budget	2027 Dollars Budgeted Per Unit per Month
4410	Maintenance Labor	327,332.00	218,589.00	168,572.00	-22.88%	90.05
4420	Materials & Supplies	129,787.00	136,539.00	150,000.00	9.85%	80.13
4430	Contract Costs	258,876.00	94,647.00	108,011.00	14.11%	57.70
4510	Insurance	65,934.00	66,683.00	66,429.00	-0.38%	35.49
4520	Payment in Lieu of Taxes	5,825.00	4,926.00	5,825.00	18.25%	3.11
4540	Employee Benefits	143,352.00	92,682.00	132,023.00	42.44%	70.53
4541	Employee Benefits - GASB 75	0.00	687.00	0.00	-100.00%	0.00
4542	Pension Expense - GASB 68	0.00	0.00	0.00	0.00%	0.00
4570	Collection Loss	1,500.00	12,653.00	1,500.00	-88.14%	0.80
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
4610	Extraordinary Maintenance - Non-Capitalized	15,000.00	30,834.00	10,000.00	-67.56%	5.34
4611	Equipment Purchases - Non Capitalized	10,000.00	24,425.00	15,000.00	-38.58%	8.01
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	240,124.00	0.00	-100.00%	0.00

Consolidated Budget (400-1) for all state-aided 667 (Elderly), 200 (family), and 705 (scattered site family) developments owned by SHREWSBURY HOUSING AUTHORITY						
SUMMARY						
Account Number	Account Class	2026 Approved Revenue Budget	2026 Actual Amounts Received	2027 Approved Revenue Budget	% Change from 2026 Actual to 2027 Budget	2027 Dollars Budgeted Per Unit per Month
-4410	Maintenance Labor (Extra Services)	42,000.00	0.00	21,000.00	0.00%	11.22
7520	Replacement of Equipment - Capitalized	0.00	0.00	0.00	0.00%	0.00
7540	Betterments & Additions - Capitalized	0.00	9,859.00	0.00	-100.00%	0.00

Explanation of Budget Accounts

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

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

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

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

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

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

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

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

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

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

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

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

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

3802: Operating Subsidy – MRVP/AHVP Landlords:

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

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

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

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

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

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

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

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

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

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

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

4191: Tenant Organization: LTO Funding by the LHA. Upon request the LHA shall fund all LTOs in a city or town at the annual rate of $25.00 per state-aided public housing unit occupied or available for occupancy by residents represented by such LTO(s) or an annual total of $500.00 prorated among all such LTO(s), whichever is more. For more information on the creation and funding of LTOs see 760 CMR 6.09.

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

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

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

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

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

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

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

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

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

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

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

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

4520: Payments in Lieu of Taxes:

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

Narrative Responses to the Performance Management Review (PMR) Findings

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

Explanation of PMR Criteria Ratings

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

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

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

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

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

Policies

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

Policy	Last Ratified by Board Vote	Notes
*Capitalization Policy	11/8/2016	
*Fair Housing Marketing Plan	3/15/2022	
*Grievance Policy	8/1/2012	
*Language Access Plan	10/9/2018	
*Personnel Policy	1/12/2015	
*Procurement Policy	8/16/2016	
*Reasonable Accommodations Policy	8/13/2019	
*Rent Collection Policy	10/9/2018	
Community Room Use	12/9/2018	
Credit/Debit Card Policy	11/10/2015	
Criminal Offender Records Information (CORI) Policy	7/12/2005	
Other – Define in the 'Notes' column	12/8/2020	Portable Space Heater Policy
Other – Define in the 'Notes' column	11/10/2015	Fraud Policy
Other – Define in the 'Notes' column	7/21/2020	Tenant Personal Property Policy
Parking	6/15/2016	

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

Waivers

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

Description	Reason	Date Approved by EOHLC	Date Expired

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

Glossary

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

AHVP: Alternative Housing Voucher Program

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

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

ANUEL: Allowable Non-Utility Expense Level

AP: Annual Plan

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

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

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

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

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

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

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

CNA: Capital Needs Assessment

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

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

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

EOHLC: Massachusetts Executive Office of Housing and Livable Communities

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

FF: Formula Funding

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

FYE: Fiscal Year End

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

HHA: Host Housing Authority for the RCAT program.

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

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

LHA: Local Housing Authority

LTO: Local Tenants Organization

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

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

MOR: Management and Occupancy Report

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

PMR: Performance Management Review

RCAT: Regional Capital Assistance Team

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

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

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

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

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

Attachments

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

- . Performance Management Review
- . 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.

SHREWSBURY HOUSING AUTHORITY

Performance Management Review (PMR) Report

Fiscal Year End 3/31/2025

*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	SHREWSBURY HOUSING AUTHORITY
Fiscal Year Ending	Mar 2025
Housing Management Specialist	Thomas Lee
Facilities Management Specialist	Wilzor Exantus

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

Report Date: 07/29/2025 13:17:54

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

LHA Name	SHREWSBURY HOUSING AUTHORITY
FYE	Mar 2025
HMS Name	Thomas Lee
FMS Name	Wilzor Exantus

Criteria	Rating
Staff Certification and Training	No Findings

Report Date: 07/29/2025 13:17:54

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

LHA Name	SHREWSBURY HOUSING AUTHORITY
FYE	Mar 2025
HMS Name	Thomas Lee
FMS Name	Wilzor Exantus

CFA Submission

Rating: No Findings

Recommendations: 1. No Recommendations

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

LHA Name	SHREWSBURY HOUSING AUTHORITY
FYE	Mar 2025
HMS Name	Thomas Lee
FMS Name	Wilzor Exantus

Occupancy

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

1. No Recommendations

Tenant Accounts Receivable (TAR)

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

1. Adhere to your rent collection policy and lease, i.e. sending notices, reminder letters, 14-day notice to quit, 30-day notice etc. Send notices to tenants early and frequently.
2. Increase ways to accept rent payment, i.e. check scanners, lock boxes, electronic debit, autopay, etc.
3. Report to credit bureau when resident has vacated unit with past due rent balance.
4. Create written repayment agreements, either in house or court ordered, and ensure they are adhered to.
5. Evaluate vacated balances to better understand what is collectible and what is unlikely to be collected and could be written off. Don't allow tenant balances to build-up before doing lease enforcement. Review aged receivables report regularly.
6. Set reasonable thresholds for commencing legal action.
7. Ensure proper documentation of past due balances and collection efforts with tenants.
8. Work with an RSC for outreach to chronically late rent paying households to connect households with other financial resources to support the overall household budget.

Board Member Training

Rating: No Findings

1. No Recommendations

Certifications and Reporting Submissions

Rating: No Findings

1. No Recommendations

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

Official Published PMR Record

LHA Name	SHREWSBURY HOUSING AUTHORITY
FYE	Mar 2025
HMS Name	Thomas Lee
FMS Name	Wilzor Exantus

CHAMP Criteria 1a

Rating: No Findings

Recommendations: 1. No Recommendations

CHAMP Criteria 1b

Rating: No Findings

Recommendations: 1. No Recommendations

CHAMP Criteria 1c

Rating: No Findings

Recommendations: 1. No Recommendations

CHAMP Criteria 2a

Rating: Corrective Action

Recommendations: 1. Ensure that all vacancies are recorded in the EOHLC Housing Apps Vacancy Reporting System within 30 days of the vacancy date.
2. Ensure that you are entering vacancy data correctly within 30 days.
3. Establish reoccurring calendars reminders to help ensure vacancy data is entered into the EOHLC Housing Apps Vacancy Reporting System within 30 days.

CHAMP Criteria 2b

Rating: Operational Guidance

Recommendations: 1. Double check the data entry to reduce errors

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	SHREWSBURY HOUSING AUTHORITY
FYE	Mar 2025
HMS Name	Thomas Lee
FMS Name	Wilzor Exantus

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

Rating: No Findings

Recommendations:
1. Ensure that all deficiencies found at the time of unit inspection are included in Inspection Reports including tenant violations
2. Ensure that work orders are created, tracked, and completed for all Health and Safety deficiencies
3. Ensure that all Notices of Lease Violation are issued for all tenant related deficiencies identified during unit inspection
4. Ensure that all Lease Violations are resolved per EOHLC guidance
5. Ensure that Units are Inspected per EOHLC guidance
6. Ensure Inspection Reports are created for each Unit Inspection

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

Rating: Corrective Action

Recommendations:
1. Ensure that all deficiencies found at the time of unit inspection are included in Inspection Reports including tenant violations
2. Ensure that work orders are created, tracked, and completed for all Health and Safety deficiencies
3. Ensure that all Notices of Lease Violation are issued for all tenant related deficiencies identified during unit inspection
4. Ensure that all Lease Violations are resolved per EOHLC guidance
5. Ensure that Units are Inspected per EOHLC guidance
6. Ensure Inspection Reports are created for each Unit Inspection

Criteria 3: Unit Inspection Reports accurately reflect necessary repairs

Rating: No Findings

Recommendations:
1. No Recommendations

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

Rating: No Findings

Recommendations:
1. No Recommendations

Criteria 5: Vacancy Turnover Work Orders accurately reflect necessary repairs

Rating: No Findings

Recommendations: 1. No Recommendations

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

Rating: No Findings

Recommendations: 1. No Recommendations

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

Rating: No Findings

Recommendations: 1. No Recommendations

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

Rating: No Findings

Recommendations: 1. No Recommendations

Health & Safety Deficiencies

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