

Framingham Housing Authority Annual Plan for Fiscal Year 2024 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 DHCD.

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 Framingham Housing Authority's Annual Plan for their 2024 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
 - a. none
 - b. Cover sheet for tenant satisfaction surveys
 - c. Tenant Satisfaction Survey 667 Program
 - d. Tenant Satisfaction Survey 200 and 705 Program

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
667-04	Elderly	Arsenal 667-04	10	1965	80
667-02	Elderly	Everett, Gallagher, and Grant Streets 667-C	7	1961	40
667-03	Elderly	Guadacanal, Normandy, and Arsenal Road	11	1963	80
667-07	Elderly	Hastings House 667-07	1	1981	72
667-08	Elderly	Memorial House 667-08	1	1987	60
705-03	Family	Oran Road 705-03	3	1956	12
667-06	Elderly	Rose Kennedy 667-06	9	1973	84
667-05	Elderly	Rose Kennedy Lane 667-05	10	1968	120
705-02	Family	Scattered Site - Beaver Gardens / Beaver P:	0	0	58
200-02	Family	St. Lo Rd 200-02	50	1949	75
200-01	Family	The Musterfield at Concord Place 200-01	11	1950	110
	Other	Special Occupancy units	3		23
	Family	Family units in smaller developments	3		6
Total			119		820

Massachusetts Rental Voucher Program (MRVP)

The Massachusetts Rental Voucher Program (MRVP) is a state-funded program that provides rental subsidies to low-income families and individuals. In most cases, a “mobile” voucher is issued to the household, which is valid for any market-rate housing unit that meets the standards of the state sanitary code and program rent limitations. In some cases, vouchers are “project-based” into a specific housing development; such vouchers remain at the development if the tenant decides to move out.

Framingham Housing Authority manages 63 MRVP vouchers.

Federally Assisted Developments

Framingham Housing Authority also manages Federally-assisted public housing developments and/or federal rental subsidy vouchers serving 1218 households.

LHA Central Office

Framingham Housing Authority
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Paul Landers, Executive Director
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LHA Board of Commissioners

	<u>Role</u>	<u>Category</u>	<u>From</u>	<u>To</u>
Stephen Joyce	Treasurer		04/01/2022	04/01/2026
Janet Leombruno	Vice-Chair	State Appointee	12/14/2015	04/21/2024
Robert L. Merusi	Treasurer		04/01/2022	04/01/2027
Roberta Roberti		State Tenant Rep	03/01/2023	03/01/2028
Janice M. Rogers	Chair		04/01/2014	06/30/2024

Plan History

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

	<u>REQUIREMENT</u>	<u>DATE COMPLETED</u>
A.	Advertise the public hearing on the LHA website.	07/21/2023
B.	Advertise the public hearing in public postings.	07/21/2023
C.	Notify all LTO's and 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.	07/21/2023
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.)	09/11/2023
G.	Executive Director presents the Annual Plan to the Board.	09/11/2023
H.	Board votes to approve the AP. (For Boston Housing Authority, the Administrator approves and submits the AP.)	09/11/2023

Certification

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

I, Kristin Davis, Manager of Modernization and Procurement of the Framingham Housing Authority, certify on behalf of the Housing Authority that I have conducted an annual review of all Framingham Housing Authority users of DHCD Capital Software applications and Housing Applications and that all current LHA users are authorized to use the systems and have the appropriate level of user access based on their job responsibility. I approve all system access and access levels for all Framingham Housing Authority users.

This certification applies to the following applications:

- Capital Planning System (CPS)
- Consolidated Information Management System (CIMS)
- Cap Hub
- DHCD Housing Management Systems

CERTIFICATION FOR SUBMISSION OF THE ANNUAL PLAN

I, Kristin Davis, Manager of Modernization and Procurement of the Framingham Housing Authority, certify on behalf of the Housing Authority that: a) the above actions all took place on the dates listed above; b) all facts and information contained in this Annual Plan are true, correct and complete to the best of my knowledge and belief and c) that the Annual Plan was prepared in accordance with and meets the requirements of the regulations at 760 CMR 4.16 and 6.09.

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

Date of certification: 09/13/2023

The Department of Housing and Community Development (DHCD) completed its review of this Annual Plan (AP) on September 20, 2023. Review comments have been inserted into the plan.

Capital Improvement Plan (CIP)**Capital Improvement Plan****DHCD Description of CIPs:**

The Capital Improvement Plan (CIP) is a five year plan which identifies capital projects, provides a planning scope, schedule and budget for each capital project and identifies options for financing and implementing the plan. The CIP identifies anticipated spending for each Department of Housing and Community Development (DHCD) fiscal year (July 1 to June 30) based on the project schedules.

Local Housing Authorities (LHAs) receive yearly awards from DHCD (Formula Funding Awards) which they target to their most urgent capital needs in their CIP. They may also receive special awards from DHCD for specific projects which meet specific criteria. Special awards may be given for certain emergency, regulation compliance, energy and water conservation, and other projects. The first three years of the CIP are based on actual awards made to the LHA, while years four and five are based on estimated planning amounts, not actual awards.

LHAs may sometimes secure other sources of funding and assistance that you will note in their CIP, such as: Community Preservation Act (CPA) funding, Community Development Block Grant (CDBG) funding, Local Affordable Housing Trust Funds (AHTF), HOME grants, income from leasing a cell tower on their property, savings from net meter credit contracts with solar developers, utility rebates and contracted work from utility providers, and Sheriff's Department work crews. However, not all of these funding sources are available every year, or in all communities.

The CIP includes the following parts:

- A table of available funding sources and amounts
- A list of planned capital projects showing spending per fiscal year
- A table showing special awards and other funding for targeted projects, if any, which supplements Formula Funding awarded to the LHA
- A 'narrative' with a variety of additional information.

Additional Remarks by Framingham Housing Authority

Our goal as always is to enhance the life-quality of our residents. Our CIP addresses this goal by focusing on upgrading our aging property and health and safety items. We can complete many of the projects by using FHA Staff and therefore able to get more projects done.

Capital Improvement Plan (CIP)

Aggregate Funding Available for Projects in the First Three Years of the CIP:

Category of Funds	Allocation	Planned Spending	Description
Balance of Formula Funding (FF)	\$3,629,028.81		Total of all FF awards minus prior FF spending
LHA Emergency Reserve	\$544,354.32		Amount to reserve for emergencies
Net FF Funds (First 3 Years of the CIP)	\$3,084,674.49	\$3,259,122.83	Funds to plan & amount actually planned in the first 3 years of the CIP
ADA Set-aside	\$35,345.01	\$35,345.01	Accessibility projects
DMH Set-aside	\$58,298.89	\$58,298.89	Dept. of Mental Health facility
DDS Set-aside	\$62,729.59	\$62,445.59	Dept. of Developmental Services facility
Unrestricted Formula Funding (FF)	\$2,928,301.00	\$3,103,033.34	Funds awarded by DHCD to be used on projects selected by the LHA and approved by DHCD.
Special DHCD Funding	\$494,656.89	\$494,656.89	Targeted awards from DHCD
Community Development Block Grant (CDBG) Funds	\$64,999.35	\$64,999.35	Federal funds awarded by a city or town for specific projects.
Community Preservation Act (CPA) Funds	\$0.00	\$0.00	Community Preservation Act funds awarded by a city or town for specific projects.
Operating Reserve(OR) Funds	\$8,921.00	\$8,921.00	Funds from the LHA's operating budget.
Other Funds	\$1,019,427.94	\$1,019,427.94	Funds other than those in the above categories. See explanation below.
Total funds and planned spending	\$4,672,679.66	\$4,847,128.00	Total of all anticipated funding available for planned projects and the total of planned spending.

Additional notes about funding:

The housing authority is always looking to utilize other sources of funding as they become available.

Capital Improvement Plan (CIP)**CIP Definitions:**

ADA Set-aside is funding allocated within the Formula Funding (FF) for use on projects that improve accessibility for people with disabilities. 10% of FF awards are designated for this purpose.

Available State Bond Funding is the amount of State Bond Funding available to the LHA for the first three years of the CIP. It is calculated by totaling all of FF and Special Awards granted to the LHA through the end of the third year of the plan and subtracting the amount of these funds spent prior to July 1 of the first year of the plan.

Amount spent prior to the plan is the total amount of Formula Funding (FF) and Special Awards spent prior to July 1 of the first year of the plan.

Capital project is a project that adds significant value to an asset or replaces building systems or components. Project cost must be greater than \$1000.

CDBG stands for Community Development Block Grant, a potential source of project funds.

CPA stands for Community Preservation Act, a potential source of project funds.

CapHub Project Number is the number given to projects entered into DHCD's project management system known as CapHub.

DMH Set-aside is funding allocated within the Formula Funding (FF) for use on facilities leased to the Department of Mental Health (DMH) program vendors, if any exist at this LHA.

DDS Set-aside is funding allocated within the Formula Funding (FF) for use on facilities leased to the Department of Developmental Services (DDS) program vendors, if any exist at this LHA.

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

Operating Reserve is an account, funded from the LHA operating budget, primarily used for unexpected operating costs, including certain extraordinary maintenance or capital projects.

Other Funds could include other funding by the city or town or from other sources.

Special Awards are DHCD awards targeted to specific projects. Award programs include funds for emergencies beyond what an LHA can fund, for complying with regulatory requirements, for projects that will save water or energy use, and various other programs the department may run from time to time.

Total Cost is the sum of investigation, design, administration, permitting, and construction costs for a project

Unrestricted Formula Funding (FF) is money awarded to the LHA by DHCD under the Formula Funding program other than amounts set aside (restricted) for accessibility improvements or for facilities operated by DMH or DDS.

Capital Improvement Plan (CIP)

Formula Funding and Special DHCD Award Planned Spending - Other funding not included

Cap Hub Project Number	Project Name	Development(s)	Total Cost	Amount Spent Prior to Plan	Remaining Planned for 2023	fy2024 Planned	fy2025	fy2026	fy2027	fy2028
100130	FF: Gutter and Downspout Replacement	TEMPLE PLACE 689-01	\$8,921	\$0	\$0	\$0	\$0	\$0	\$0	\$0
100132	HILAPP St Lo Windows, Siding, Ext Doors	St. Lo Rd 200-02	\$1,462,517	\$974,769	\$0	\$367,086	\$0	\$0	\$0	\$0
100140	FF: Kitchens/Bathrooms/Floors Reno 667-4 17	Arsenal 667-04	\$27,972	\$27,972	\$0	\$0	\$0	\$0	\$0	\$0
100142	FF: Unit Rehab	Rose Kennedy 667-06	\$21,000	\$6,125	\$0	\$398	\$0	\$0	\$0	\$0
100146	FF: Fire Alarm Upgrades	Arsenal 667-04	\$50,000	\$50,000	\$0	\$0	\$0	\$0	\$0	\$0
100157	FF: Site Lighting Upgrades	Rose Kennedy Lane/Rose Kennedy Lane	\$19,286	\$11,370	\$0	\$7,917	\$0	\$0	\$0	\$0
100159	FF: 1B Rose Kennedy Lane Rehab	Rose Kennedy 667-06	\$25,943	\$5,415	\$0	\$20,529	\$0	\$0	\$0	\$0
100167	FF: Tub Wall Replacement 667-5	Rose Kennedy 667-06	\$1,000	\$977	\$0	\$24	\$0	\$0	\$0	\$0
100168	FF: RKL WINDOW REPLACEMENT	Rose Kennedy 667-06	\$185,253	\$130,855	\$0	\$38,750	\$0	\$0	\$0	\$0
100169	FF: tub wall replacement 667-6	Rose Kennedy 667-06	\$1,000	\$907	\$0	\$94	\$0	\$0	\$0	\$0
100171	ADA Accessible Door	Hastings House 667-07	\$9,990	\$6,736	\$0	\$3,255	\$0	\$0	\$0	\$0

Capital Improvement Plan (CIP)

Formula Funding and Special DHCD Award Planned Spending - Other funding not included

Cap Hub Project Number	Project Name	Development(s)	Total Cost	Amount Spent Prior to Plan	Remaining Planned for 2023	fy2024 Planned	fy2025	fy2026	fy2027	fy2028
100172	17 st lo Emergency Sewer Pipe Repair	St. Lo Rd 200-02	\$13,141	\$13,141	\$0	\$0	\$0	\$0	\$0	\$0
100175	(2020) Site Paving 667-5	Rose Kennedy 667-06	\$4,500	\$3,750	\$0	\$750	\$0	\$0	\$0	\$0
100176	(2020) Site Paving 667-6	Rose Kennedy 667-06	\$4,500	\$0	\$0	\$4,500	\$0	\$0	\$0	\$0
100178	Occupied Kitchen Renovations	Everett, Gallagher, and Grant Streets	\$251,935	\$23,514	\$0	\$18,059	\$0	\$0	\$0	\$0
100179	Security Cameras (667-2)	Everett, Gallagher, and Grant Streets	\$10,000	\$7,948	\$0	\$2,053	\$0	\$0	\$0	\$0
100180	Basement Drainage	Everett, Gallagher, and Grant Streets	\$40,250	\$19,414	\$0	\$20,837	\$0	\$0	\$0	\$0
100181	(2020)Exterior Door Replacement 667-3	Arsenal 667-04	\$10,143	\$10,143	\$0	\$0	\$0	\$0	\$0	\$0
100182	Roofs 667-3 & 667-4	Arsenal 667-04	\$394,000	\$396,694	\$0	\$1,000	\$0	\$0	\$0	\$0
100185	(2020) 667-6 RKL Floors/kitchens/b aths	Rose Kennedy 667-06	\$10,058	\$10,058	\$0	\$0	\$0	\$0	\$0	\$0
100187	ROOF TOP AC UPGRADE	Hastings House 667-07	\$40,250	\$10,500	\$0	\$28,724	\$0	\$0	\$0	\$0
100188	Re-pointing of Masonry	Hastings House 667-07	\$103,876	\$102,318	\$0	\$0	\$0	\$0	\$0	\$0
100194	FF: H&S FY20: Fencing Repairs	Rose Kennedy 667-06	\$20,000	\$11,974	\$0	\$3,676	\$0	\$0	\$0	\$0

Capital Improvement Plan (CIP)

Formula Funding and Special DHCD Award Planned Spending - Other funding not included

Cap Hub Project Number	Project Name	Development(s)	Total Cost	Amount Spent Prior to Plan	Remaining Planned for 2023	fy2024 Planned	fy2025	fy2026	fy2027	fy2028
100196	FF: H&S FY20: LED Entrance lights	St. Lo Rd 200-02	\$2,500	\$2,170	\$0	\$330	\$0	\$0	\$0	\$0
100197	FF: H&S FY20: columns and railings/broken flag stone patio	Arsenal 667-04	\$28,875	\$27,531	\$0	\$1,345	\$0	\$0	\$0	\$0
100200	667-3 Ars rd Vacant Unit Repairs	Guadacanal, Normandy, and Arsenal Road 667-03	\$6,864	\$2,391	\$0	\$197	\$0	\$0	\$0	\$0
100201	667-4 Ars Rd Vacant Unit Repairs	Arsenal 667-04	\$11,458	\$3,866	\$0	\$1	\$0	\$0	\$0	\$0
100202	Security Cameras Ars (667-4)	Arsenal 667-04	\$5,800	\$5,800	\$0	\$0	\$0	\$0	\$0	\$0
100205	Fire Alarm Repairs Emergency	Rose Kennedy 667-06	\$18,504	\$14,308	\$0	\$4,196	\$0	\$0	\$0	\$0
100206	Community Room A/C Upgrade	Rose Kennedy 667-06	\$40,250	\$0	\$0	\$3,133	\$3,883	\$0	\$0	\$0
100207	Fire Alarm Repairs Emergency	Oran Road 705-03	\$1,216	\$1,216	\$0	\$0	\$0	\$0	\$0	\$0
100209	Water Break Ars.	Arsenal 667-04	\$7,327	\$7,327	\$0	\$0	\$0	\$0	\$0	\$0
100210	Emergency A/C Replacement	Alexander St 689-03	\$10,000	\$0	\$0	\$5,025	\$0	\$0	\$0	\$0
100212	Kitchens/Baths/Floors (vacant units 667-3)	Guadacanal, Normandy, and Arsenal Road 667-03	\$22,157	\$8,175	\$0	\$0	\$0	\$0	\$0	\$0

Capital Improvement Plan (CIP)

Formula Funding and Special DHCD Award Planned Spending - Other funding not included

Cap Hub Project Number	Project Name	Development(s)	Total Cost	Amount Spent Prior to Plan	Remaining Planned for 2023	fy2024 Planned	fy2025	fy2026	fy2027	fy2028
100213	Hallways/ Entry Doors /stair treads	Guadacanal, Normandy, and Arsenal Road 667-03	\$138,673	\$108,431	\$0	\$190	\$0	\$0	\$0	\$0
100215	Roof for community building	Arsenal 667-04	\$16,589	\$0	\$0	\$16,589	\$0	\$0	\$0	\$0
100216	(2020) Exterior Door Replacement 667-4	Arsenal 667-04	\$12,085	\$12,085	\$0	\$0	\$0	\$0	\$0	\$0
100217	(2020)667-4 Ars floors/kitchens/b aths	Arsenal 667-04	\$10,114	\$10,114	\$0	\$0	\$0	\$0	\$0	\$0
100220	Kitchen/Bathrooms/Floors (vacant units 667-5)	Rose Kennedy Lane 667-05	\$16,064	\$5,302	\$0	\$0	\$0	\$0	\$0	\$0
100221	Kitchen/Bathrooms/Floors (vacant units 667-6)	Rose Kennedy 667-06	\$17,255	\$14,427	\$0	\$1	\$0	\$0	\$0	\$0
100222	Site Fence Replacement Temple	TEMPLE PLACE 689-01	\$12,000	\$0	\$0	\$12,000	\$0	\$0	\$0	\$0
100223	misc improvements	TEMPLE PLACE 689-01	\$5,983	\$0	\$0	\$5,983	\$0	\$0	\$0	\$0
100224	Fire Escape/Deck Replacement 24 underwood	Underwood 689-02	\$15,000	\$14,578	\$0	\$422	\$0	\$0	\$0	\$0

Capital Improvement Plan (CIP)

Formula Funding and Special DHCD Award Planned Spending - Other funding not included

Cap Hub Project Number	Project Name	Development(s)	Total Cost	Amount Spent Prior to Plan	Remaining Planned for 2023	fy2024 Planned	fy2025	fy2026	fy2027	fy2028
100225	Bathroom Plumbing Fixture Replacement	TEMPLE PLACE 689-01	\$16,370	\$0	\$0	\$16,370	\$0	\$0	\$0	\$0
100226	Site Fencing and Storage Shed Replacement	Alexander St 689-03	\$25,265	\$11,162	\$0	\$14,104	\$0	\$0	\$0	\$0
100229	Driveway/Tree Trimming/ Misc. Site work as needed.	Underwood 689-02	\$12,000	\$8,150	\$0	\$3,850	\$0	\$0	\$0	\$0
100230	Fire alarm Control panel Replacement	Everett, Gallagher, and Grant Streets 667-02	\$21,713	\$21,713	\$0	\$0	\$0	\$0	\$0	\$0
100231	panel and heat detector replacement	Arsenal 667-04	\$27,470	\$24,133	\$0	\$3,338	\$0	\$0	\$0	\$0
100232	emergency storm drain repair.	Rose Kennedy Lane 667-05	\$10,000	\$2,256	\$0	\$7,745	\$0	\$0	\$0	\$0
100233	Accessible approaches ADA sidewalks	Rose Kennedy Lane 667-05, 667-06	\$15,599	\$15,000	\$0	\$0	\$0	\$0	\$0	\$0
100234	Roof Replacement	Scattered Site 705-01	\$58,274	\$21,328	\$0	\$28,446	\$0	\$0	\$0	\$0
100235	Heating system	Scattered Site 705-01	\$14,823	\$6,819	\$0	\$8,005	\$0	\$0	\$0	\$0
100238	(2021)Site improvements	St. Lo Rd 200-02	\$20,000	\$0	\$0	\$20,000	\$0	\$0	\$0	\$0
100239	occupied kitchen renovations (2)	Everett, Gallagher, and Grant Streets 667-02	\$50,000	\$0	\$0	\$50,000	\$0	\$0	\$0	\$0

Capital Improvement Plan (CIP)

Formula Funding and Special DHCD Award Planned Spending - Other funding not included

Cap Hub Project Number	Project Name	Development(s)	Total Cost	Amount Spent Prior to Plan	Remaining Planned for 2023	fy2024 Planned	fy2025	fy2026	fy2027	fy2028
100240	SUMP PUMPS AND BASEMENT IMPROVEMENTS	Everett, Gallagher, and Grant Streets 667-02	\$45,375	\$0	\$0	\$45,375	\$0	\$0	\$0	\$0
100241	Site lighting replacement	Everett, Gallagher, and Grant Streets 667-02	\$62,934	\$0	\$0	\$62,934	\$0	\$0	\$0	\$0
100242	Kitchens/Bathrooms/Floors Renovations 667-3	Guadacanal, Normandy, and Arsenal Road 667-03	\$28,250	\$0	\$0	\$28,250	\$0	\$0	\$0	\$0
100243	667-3 Ars floors/kitchens/baths	Guadacanal, Normandy, and Arsenal Road 667-03	\$10,000	\$0	\$0	\$10,000	\$0	\$0	\$0	\$0
100244	Parking Lot Repave	Guadacanal, Normandy, and Arsenal Road 667-03	\$170,598	\$10,056	\$0	\$980	\$0	\$0	\$0	\$0
100245	Kitchens Arsenal 667-4	Arsenal 667-04	\$15,000	\$4,189	\$0	\$9,137	\$0	\$0	\$0	\$0
100246	Arsenal Road Site Repaving/Curbs/ Site Fence Replacement	Arsenal 667-04	\$45,767	\$879	\$0	\$20,597	\$0	\$0	\$0	\$0
100247	interior unit door replacement	Rose Kennedy Lane 667-05	\$32,000	\$0	\$0	\$32,000	\$0	\$0	\$0	\$0
100248	vacant unit rehab	Rose Kennedy Lane 667-05	\$15,000	\$2,099	\$0	\$1,569	\$0	\$0	\$0	\$0
100250	Intercom Upgrade	Memorial House 667-08	\$158,439	\$0	\$0	\$60,754	\$0	\$0	\$0	\$0

Capital Improvement Plan (CIP)

Formula Funding and Special DHCD Award Planned Spending - Other funding not included

Cap Hub Project Number	Project Name	Development(s)	Total Cost	Amount Spent Prior to Plan	Remaining Planned for 2023	fy2024 Planned	fy2025	fy2026	fy2027	fy2028
100251	WINDOW REPLACEMENT	Memorial House 667-08	\$24,760	\$0	\$0	\$0	\$0	\$0	\$0	\$0
100252	Window Replacement Bethany	Scattered Site 705-01	\$15,000	\$0	\$0	\$15,000	\$0	\$0	\$0	\$0
100253	RKL Lightning Strike 11-13-21 (Even Side)	Rose Kennedy Lane	\$27,430	\$27,430	\$0	\$0	\$0	\$0	\$0	\$0
100254	Kitchen Renovations	Alexander St 689-03	\$34,788	\$23,400	\$0	\$11,389	\$0	\$0	\$0	\$0
100255	Walkway Tripping Hazard Repairs	Memorial House 667-08	\$13,050	\$11,909	\$0	\$9	\$0	\$0	\$0	\$0
100256	Common Areas Hallway Painting	Memorial House 667-08	\$46,352	\$0	\$0	\$6,500	\$0	\$0	\$0	\$0
100257	Carpet Squares Common Area Hallways	Memorial House 667-08	\$29,900	\$0	\$0	\$14,615	\$0	\$0	\$0	\$0
100258	Laundry Room Floor Replacement	Memorial House 667-08	\$9,775	\$0	\$0	\$6,836	\$0	\$0	\$0	\$0
100259	Chain Link Fencing Replacement	Memorial House 667-08	\$29,900	\$0	\$0	\$22,956	\$0	\$0	\$0	\$0
100260	Miscellaneous Site Improvements	Memorial House 667-08	\$12,938	\$0	\$0	\$11,076	\$0	\$0	\$0	\$0
100261	Storage Garage	Scattered Site 705-01	\$31,250	\$0	\$0	\$31,250	\$0	\$0	\$0	\$0

Capital Improvement Plan (CIP)

Formula Funding and Special DHCD Award Planned Spending - Other funding not included

Cap Hub Project Number	Project Name	Development(s)	Total Cost	Amount Spent Prior to Plan	Remaining Planned for 2023	fy2024 Planned	fy2025	fy2026	fy2027	fy2028
100263	ARPA Targeted Award-Framingham Fire Alarm System Upgrade	667-02, 667-08, 689-01, 689-02	\$959,476	\$0	\$0	\$0	\$0	\$0	\$0	\$0
100264	Community Room Flooring	Rose Kennedy 667-06	\$19,900	\$0	\$0	\$2,535	\$0	\$0	\$0	\$0
100276	(2020) Site Paving 200-2	St. Lo Rd 200-02	\$6,806	\$0	\$0	\$6,806	\$0	\$0	\$0	\$0
100278	Vacant units 667-4	Arsenal 667-04	\$14,950	\$0	\$0	\$14,950	\$0	\$0	\$0	\$0
100279	Entry Doors RKL (2)	Rose Kennedy 667-06	\$113,438	\$0	\$0	\$88,139	\$25,300	\$0	\$0	\$0
100280	Vacant Units 667-6	Rose Kennedy 667-06	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
100281	change unit locks	Hastings House 667-07	\$31,050	\$0	\$0	\$31,050	\$0	\$0	\$0	\$0
100282	Vacant Units Hastings	Hastings House 667-07	\$14,950	\$0	\$0	\$14,950	\$0	\$0	\$0	\$0
100283	Cracks and lintel separation	Guadacanal, Normandy, and Arsenal Road 667-03	\$48,073	\$0	\$0	\$48,073	\$0	\$0	\$0	\$0
100284	Exterior door replacement	Rose Kennedy Lane 667-05	\$235,950	\$0	\$0	\$63,242	\$172,709	\$0	\$0	\$0
100286	Interior Floor Finishes Replacement	TEMPLE PLACE 689-01	\$29,231	\$0	\$0	\$29,231	\$0	\$0	\$0	\$0

Capital Improvement Plan (CIP)

Formula Funding and Special DHCD Award Planned Spending - Other funding not included

Cap Hub Project Number	Project Name	Development(s)	Total Cost	Amount Spent Prior to Plan	Remaining Planned for 2023	fy2024 Planned	fy2025	fy2026	fy2027	fy2028
100287	Emergency Repairs to the Boiler (Force Account)	Hastings House 667-07	\$6,025	\$0	\$0	\$3	\$0	\$0	\$0	\$0
100288	emergency Deck repairs (rear)	Scattered Site 705-01	\$19,550	\$0	\$0	\$14,918	\$0	\$0	\$0	\$0
100289	Emergency Tub Wall Repairs (Force Account)	Scattered Site 705-01	\$7,563	\$0	\$0	\$5,173	\$0	\$0	\$0	\$0
100290	Replace Failed Heat Detectors/Bases	Guadacanal, Normandy, and Arsenal Road 667-03	\$9,775	\$0	\$0	\$9,775	\$0	\$0	\$0	\$0
100291	34A Arsenal Road (bad unit)	Arsenal 667-04	\$19,550	\$0	\$0	\$5,445	\$0	\$0	\$0	\$0
100292	ARPA TAR: Fed Pac & Master Meter Compliance - Stoves	Rose Kennedy 667-06	\$570,750	\$0	\$0	\$519,731	\$0	\$0	\$0	\$0
100293	Kitchen Renovation 46 Bethany.	Scattered Site 705-01	\$15,100	\$0	\$0	\$15,100	\$0	\$0	\$0	\$0
100294	Site Work	Scattered Site 705-01	\$10,000	\$0	\$0	\$10,000	\$0	\$0	\$0	\$0
100295	Geothermal Pilot Program RKL	Rose Kennedy Lane 667-05	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
100296	Deck Repair/Replacement	St. Lo Rd 200-02	\$20,082	\$0	\$0	\$20,082	\$0	\$0	\$0	\$0

Capital Improvement Plan (CIP)

Formula Funding and Special DHCD Award Planned Spending - Other funding not included

Cap Hub Project Number	Project Name	Development(s)	Total Cost	Amount Spent Prior to Plan	Remaining Planned for 2023	fy2024 Planned	fy2025	fy2026	fy2027	fy2028
100297	Emergency Sewer Break 28-30 St Lo 7-10-23	St. Lo Rd 200-02	\$9,971	\$0	\$0	\$9,971	\$0	\$0	\$0	\$0
•	Kitchen and Bath Renovations - Phase 3	St. Lo Rd 200-02	\$151,250	\$0	\$0	\$0	\$0	\$0	\$151,250	\$0
•	(2022) Interior Renovations St Lo	St. Lo Rd 200-02	\$151,250	\$0	\$0	\$0	\$0	\$0	\$0	\$151,250
•	Vacant unit improvements	St. Lo Rd 200-02	\$30,250	\$0	\$0	\$0	\$0	\$0	\$0	\$0
•	security cameras	St. Lo Rd 200-02	\$75,625	\$0	\$0	\$0	\$0	\$0	\$75,625	\$0
•	Roof Replacements	St. Lo Rd 200-02	\$196,625	\$0	\$0	\$0	\$196,625	\$0	\$0	\$0
•	Decks St Lo	St. Lo Rd 200-02	\$75,625	\$0	\$0	\$0	\$75,625	\$0	\$0	\$0
•	Trash Corral Replacements Phase 2	St. Lo Rd 200-02	\$83,188	\$0	\$0	\$0	\$83,188	\$0	\$0	\$0
•	Sewer pipe replacement	St. Lo Rd 200-02	\$23,000	\$0	\$0	\$23,000	\$0	\$0	\$0	\$0
•	Site Paving	St. Lo Rd 200-02	\$181,500	\$0	\$0	\$0	\$181,500	\$0	\$0	\$0
•	Furnace replacement	St. Lo Rd 200-02	\$170,913	\$0	\$0	\$0	\$0	\$0	\$0	\$170,913
•	Complete plumbing modernization	St. Lo Rd 200-02	\$963,164	\$0	\$0	\$0	\$0	\$0	\$28,159	\$134,675
•	Chimney re-lining	St. Lo Rd 200-02	\$166,375	\$0	\$0	\$0	\$0	\$0	\$0	\$0

Capital Improvement Plan (CIP)

Formula Funding and Special DHCD Award Planned Spending - Other funding not included

Cap Hub Project Number	Project Name	Development(s)	Total Cost	Amount Spent Prior to Plan	Remaining Planned for 2023	fy2024 Planned	fy2025	fy2026	fy2027	fy2028
•	(2020) Site Paving 667-2	Everett, Gallagher, and Grant Streets 667-02	\$6,806	\$0	\$0	\$0	\$0	\$0	\$0	\$0
•	667-3 Kitchens/Bathrooms and floors	Guadacanal, Normandy, and Arsenal Road 667-03	\$50,000	\$0	\$0	\$0	\$50,000	\$0	\$0	\$0
•	tubwalls 4	Guadacanal, Normandy, and Arsenal Road 667-03	\$15,400	\$0	\$0	\$0	\$15,400	\$0	\$0	\$0
•	Bathroom Upgrades 667-3	Guadacanal, Normandy, and Arsenal Road 667-03	\$25,300	\$0	\$0	\$0	\$0	\$0	\$6,656	\$18,645
•	Vacant Units 667-3	Guadacanal, Normandy, and Arsenal Road 667-03	\$14,950	\$0	\$0	\$0	\$0	\$0	\$14,950	\$0
•	Kitchens and Bathrooms Renovations	Arsenal 667-04	\$37,813	\$0	\$0	\$0	\$0	\$0	\$0	\$37,813
•	667-4 kitchens/Bathroom/Floors	Arsenal 667-04	\$121,000	\$0	\$0	\$0	\$0	\$0	\$121,000	\$0
•	tubwalls 3	Arsenal 667-04	\$15,400	\$0	\$0	\$0	\$15,400	\$0	\$0	\$0
•	Arsenal Road Common Area Hallways ARPA	Arsenal 667-04	\$150,000	\$0	\$0	\$0	\$0	\$0	\$150,000	\$0

Capital Improvement Plan (CIP)

Formula Funding and Special DHCD Award Planned Spending - Other funding not included

Cap Hub Project Number	Project Name	Development(s)	Total Cost	Amount Spent Prior to Plan	Remaining Planned for 2023	fy2024 Planned	fy2025	fy2026	fy2027	fy2028
•	Common Area Hallway Painting Phase 2	Arsenal 667-04	\$100,050	\$0	\$7,399	\$92,652	\$0	\$0	\$0	\$0
•	Security Cameras	Arsenal 667-04	\$23,000	\$0	\$23,000	\$0	\$0	\$0	\$0	\$0
•	Kitchens, Baths and Floors Arsenal Vacant Units	Arsenal 667-04	\$24,956	\$0	\$0	\$0	\$24,956	\$0	\$0	\$0
•	667-5 Floors/Kitchen/Baths	Rose Kennedy Lane 667-05	\$51,750	\$0	\$0	\$0	\$0	\$51,750	\$0	\$0
•	tubwalls 1	Rose Kennedy Lane 667-05	\$15,400	\$0	\$0	\$0	\$15,400	\$0	\$0	\$0
•	Vacant Units 667-5	Rose Kennedy Lane 667-05	\$14,950	\$0	\$0	\$0	\$0	\$0	\$14,950	\$0
•	Kitchens, Bathrooms and Floors RKL -5 vacant units	Rose Kennedy Lane 667-05	\$24,956	\$0	\$0	\$0	\$24,956	\$0	\$0	\$0
•	HCAP Unit Renovations	Rose Kennedy Lane 667-05	\$75,625	\$0	\$0	\$0	\$0	\$0	\$75,625	\$0
•	Kitchens/Baths/Floors RKL Vacant units	Rose Kennedy Lane 667-05	\$52,938	\$0	\$0	\$52,938	\$0	\$0	\$0	\$0
•	interior Unit door replacement	Rose Kennedy 667-06	\$37,813	\$0	\$0	\$0	\$0	\$0	\$0	\$37,813
•	tubwalls 2	Rose Kennedy 667-06	\$15,400	\$0	\$0	\$0	\$15,400	\$0	\$0	\$0

Capital Improvement Plan (CIP)

Formula Funding and Special DHCD Award Planned Spending - Other funding not included

Cap Hub Project Number	Project Name	Development(s)	Total Cost	Amount Spent Prior to Plan	Remaining Planned for 2023	fy2024 Planned	fy2025	fy2026	fy2027	fy2028
•	Vacant units Kitchen, Bathrooms and Floors 667-6	Rose Kennedy 667-06	\$24,956	\$0	\$0	\$0	\$24,956	\$0	\$0	\$0
•	HCAP unit renovations	Rose Kennedy 667-06	\$75,625	\$0	\$0	\$0	\$0	\$0	\$0	\$75,625
•	Kitchens/Baths/Floors RKL Vacant Units 2	Rose Kennedy 667-06	\$52,938	\$0	\$0	\$52,938	\$0	\$0	\$0	\$0
•	Repointing Phase 2	Hastings House 667-07	\$137,500	\$0	\$0	\$0	\$0	\$137,500	\$0	\$0
•	intercom replacement	Hastings House 667-07	\$151,250	\$0	\$0	\$0	\$0	\$151,250	\$0	\$0
•	Mini Split Installation- 85 Alexander	Alexander St 689-03	\$12,650	\$0	\$0	\$0	\$12,650	\$0	\$0	\$0
•	Deck Replacement	Alexander St 689-03	\$34,788	\$0	\$0	\$0	\$34,788	\$0	\$0	\$0
•	Interior Floor Finishes Replacement	Underwood 689-02	\$41,941	\$0	\$0	\$5,038	\$36,904	\$0	\$0	\$0
•	Bathroom Plumbing Fixture Replacement	Underwood 689-02	\$33,284	\$0	\$0	\$3,976	\$29,309	\$0	\$0	\$0
•	Roofing Replacement	Underwood 689-02	\$34,336	\$0	\$0	\$0	\$0	\$0	\$0	\$0
•	Roofing Replacement	Alexander St 689-03	\$57,473	\$0	\$0	\$0	\$0	\$0	\$0	\$0
•	Heat Detector Replacement	Oran Road 705-03	\$2,268	\$0	\$0	\$252	\$2,017	\$0	\$0	\$0

Capital Improvement Plan (CIP)

FUNDS IN ADDITION TO ANNUAL FORMULA FUNDING AWARD

Cap Hub Project Number	Project Name	DHCD Special Award Comment	Special DHCD Awards				Other Funding			
			Emergency Reserve	Compliance Reserve	Sustainability	Special Awards	CDBG	CPA	Operating Reserve	Other Funds
100130	FF: Gutter and Downspout Replacement		\$0	\$0	\$0	\$0	\$0	\$0	\$8,921	\$0
100132	HILAPP St Lo Windows, Siding, Ext Doors	HILAPP St Lo Siding, Windows, Ext Doors	\$0	\$0	\$0	\$1,462,517	\$0	\$0	\$0	\$0
100194	FF: H&S FY20: Fencing Repairs	H&S FY20: Fencing Repairs	\$0	\$0	\$0	\$20,000	\$0	\$0	\$0	\$0
100196	FF: H&S FY20: LED Entrance lights	H&S FY20: LED Entrance lights	\$0	\$0	\$0	\$2,500	\$0	\$0	\$0	\$0
100197	FF: H&S FY20: columns and railings/broken flag stone patio	H&S FY20: columns and railings/broken flag stone patio	\$0	\$0	\$0	\$28,875	\$0	\$0	\$0	\$0
100233	Accessible approaches ADA sidewalks		\$0	\$0	\$0	\$0	\$65,000	\$0	\$0	\$20,000
100263	ARPA Targeted Award- Framingham Fire Alarm System Upgrade	ARPA Formula Funding	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$959,476
100292	ARPA TAR: Fed Pac & Master Meter Compliance - Stoves	Fed pac and master meter	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$40,000

Capital Improvement Plan (CIP) Narrative

Including Requests to DHCD & Supporting Statements

1. Request for increased spending flexibility.

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

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

- Projected spending on projects currently in bidding or construction exceeds Cap Share in one or more years of the CIP.
- We have urgent projects that require excess spending in year 1 or 2.

We have included high priority projects that we feel need to be addressed for life safety/ quality of life reasons. Projects such as roof replacements in our 200 family developments, deck replacements, tub wall projects and site paving to correct tripping hazards. As well as vacant unit projects to address our aging building components and get units back online quickly. We feel that these projects are urgent and need to be addressed in the next 1-2 years and can not be pushed off into later years.

2. Request for additional funding.

A Housing Authority may request additional funding from DHCD for projects that qualify as emergencies, required legal compliance upgrades, or sustainability improvements.

Framingham Housing Authority has not requested additional funding.

3. Overall goals of the Housing Authority's CIP

Our focus is on high property projects that enhance the life-quality of our residents. Our CIP addresses this goal by focusing on upgrading our aging properties through many projects. In order to address as many physical needs as possible we utilize our maintenance staff to complete a vast majority of our projects that we have planned.

4. Changes from the Housing Authority's previous CIP

Every new CIP differs from the previous CIP because projects have been completed and a new year has been added with new projects. These changes and other significant changes to the content of the CIP are highlighted below:

our new CIP focuses on high priority projects such as Roof replacements, intercom replacements, tub wall projects and site paving projects. we also have included projects to renovate units during the turnover process using our own staff to do the work.

5. Requirements of previous CIP approval

There were no special conditions attached to the approval of our previous CIP.

6. Quarterly capital reports

Our most recent quarterly capital report (form 80 and 90) was submitted on 04/07/2023.

7. Capital Planning System (CPS) updates

Our CPS facility data has been updated with current condition information, including changes resulting from projects completed in the past year, as of 07/28/2023.

8. Project priorities

All the projects in our CIP are high priority (Priority 1 and 2 projects).

9. High priority deficiencies

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

10. Accessibility

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

11. Special needs development

Framingham Housing Authority has one or more special needs (167 or 689 programs) development. We have completed the service provider input process according to the required procedures detailed in the lease agreement and held an annual meeting with the service provider staff at all special needs developments as of 07/07/2023.

12. Energy and water consumption

Our 12 most recent monthly energy reports are for months 3/2022 to 2/2023.

The following table lists the DHCD thresholds for Per Unit Monthly (PUM) expense for electricity, natural gas, oil, and water use and the developments at the Housing Authority that have expenses in excess of the thresholds, if any.

	Electric PUM > Threshold	Gas PUM > Threshold	Oil PUM > Threshold	Water PUM > Threshold
Threshold PUM:	\$100	\$80	\$50	\$60
	667-06			705-01
	667-02			667-07
	667-04			667-08
	667-05			200-02
				667-02
				667-04
				667-05
				200-01

Framingham has very high water rates. we are always exploring options for reduced energy consumption. we are currently part of a geothermal pilot program for 667-6 property .

13. Energy or water saving initiatives

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

14. Vacancy rate

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

5% c. 667 (DHCD Goal 2%)

1% c. 200 (DHCD Goal 2%)

0% c. 705 (DHCD Goal 2%)

Framingham Housing Authority will address the excess vacancies in the following manner: we have included projects to renovate units during the turnover process using FHA staff.

CIP Approval For Framingham Housing Authority for FY 2024

Formula Funding Capital Improvement Plan (CIP), WorkPlan 5001

9/20/2023

Congratulations! The CIP-2024 submitted by Framingham Housing Authority is approved, subject to the following conditions:

- When repaving, install conduit to ease installation of EV chargers in the future. Whenever replacing siding or roofing, ensure insulation and air barrier are to modern code. When renovating bathrooms, install bathroom fans where none exist. When renovating kitchens, consider installing range hoods and do not install gas stoves. When replacing HVAC, please do not install gas, oil, or propane equipment. All of these types of improvements may be eligible for EOHLIC sustainability funding
- For projects you intended to do using 'Force Account' please submit a standard application form. You will need EOHLIC approval of that application in writing for you to do them as Force Account. This letter does not, in and of itself, constitute approval for you to do projects using 'Force Account'.

Framingham Housing Authority is authorized to proceed on the following projects, which are to be managed with the LHA or RCAT as the Primary PM**:

CPS Number	FISH #	Project Name	TDC Amount	Primary PM	Project Year
100-200-02-S01-23-1118	100298	Sewer pipe replacement	\$23,000.00	LHA	2024
100-667-05-0-23-916	100300	Kitchens/Baths/Floors RKL Vacant units	\$52,938.00	LHA	2024
100-667-06-0-23-917	100301	Kitchens/Baths/Floors RKL Vacant Units 2	\$52,938.00	LHA	2024
100-689-2-0-07-2070	100302	Interior Floor Finishes Replacement	\$41,941.00	LHA	2024
100-689-2-0-07-2071	100303	Bathroom Plumbing Fixture Replacement	\$33,284.00	LHA	2024
100-705-03-0-18-671	100304	Heat Detector Replacement 705-3	\$2,268.00	LHA	2024
100-667-04-0-22-903	100305	Security Cameras	\$23,000.00	LHA	2024

Construction cost for FY 2024 projects is to be incurred by June 30, 2024. Construction cost for FY 2025 projects is to be incurred between July 1, 2024 and June 30, 2025. Pre-construction costs may be incurred in FY 2024.

Projects for which the Primary PM is DHCD or RCAT - Large**

CPS Number	FISH #	Project Name	TDC Amount *	Other Funding	DHCD Staff Arch/ Eng	WO/RFS Date
100-667-04-0-22-902	100299	Common Area Hallway Painting Phase 2	\$100,050.00	\$0.00	JOLSEN	10/23/2023

Going forward, if you need to add a project that is not in your approved CIP you will need to submit a revision through CIMS. Instructions for revising your CIP can be found on the CIMS Forms menu.

Details of the Approved CIP can be found at the link to 'Approved & Active CIP Reports' on the CIMS forms page in the CIP Reports section. Projects may utilize funding from multiple sources. The 'Original Approved' report details the proposed funding as submitted by the LHA. Please feel free to call DHCD Project Manager Ali Makke at (617) 573-1178 with any questions.

* Where the TDC is followed by an asterisk the project has been indicated as 'Complex' by DHCD.

**'Primary PM' is used to identify the agency responsible for updating a project's budget and schedule.

This document was created on 9/20/2023 by Ali Makke, Project Manager

Maintenance and Repair Plan

Maintenance Objective

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

About This Maintenance and Repair Plan

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

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

Classification and Prioritization of Maintenance Tasks

Maintenance items are tracked as “work orders” and are classified in the following categories. They are prioritized in the order listed. The following classifications and prioritization are required by the Department of Housing and Community Development (DHCD).

- 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.
 - o Inspections are visual and operational examinations of parts of our property to determine their condition.
 - o All dwelling units, buildings and sites must be inspected at least annually.
 - o **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	508-872-0422	after hours, weekends, and holidays
Call LHA at Phone Number	508-872-0422	8:00 am - 4:00 pm

A maintenance emergency is defined as "a condition that is immediately threatening to the life and safety of residents, staff, or structures."

If a tenant has a medical, police, or fire emergency, they need to call 911 immediately.

If a tenant has a Maintenance emergency during normal business hours, they should call Maintenance at 508-872-0422.

If a tenant has a Maintenance emergency after hours, weekends, or holidays, they should contact the Framingham Housing Authority's Answering Service at 508-872-0422. The answering service will contact a member of our staff to respond to the emergency.

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 Framingham Housing Authority main office.

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

Normal Maintenance Request Process

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

METHOD	CONTACT INFO.	TIMES
Text Phone Number		
Call Answering Service	508-872-0422	8am-4pm
Call Housing Authority Office		
Submit Online at Website		
Email to Following Email		
Other		

Work Order Management

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

Type of work order system:

Work order classification used:

Emergency	
Vacancy	
Preventative Maintenance	
Routine	
Inspections	
Tenant Requests	

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

C. Our work order process includes the following steps:

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

Maintenance Plan Narrative

Following are Framingham Housing Authority’s answers to questions posed by DHCD.

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

Our maintenance staff has worked incredibly hard to collaborate with tenants and staff to handle all maintenance requests that come up. They work diligently to ensure that all issues are handled in a timely manner and to ensure the safety and quality of life for our residents.

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

for the most part our maintenance operations have stayed the same. we continue to focus on making sure all workorderes are completed in a timely manner and focus on completing the work order paperwork accurately and efficiently.

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

one of of our goals to to make sure we are completing all vacancy workorderes in a timely manner in order to get them back online and rented.

D. Maintenance Budget Summary

The budget numbers shown below are for the consolidated budget only. They do not include values from supplemental budgets, if any.

	Total Regular Maintenance Budget	Extraordinary Maintenance Budget
Last Fiscal Year Budget	\$1,326,355.00	\$95,000.00
Last Fiscal Year Actual Spending	\$1,368,586.00	\$121,454.00
Current Fiscal Year Budget	\$1,433,871.00	\$130,000.00

E. Unit Turnover Summary

# Turnovers Last Fiscal Year	96
Average time from date vacated to make Unit "Maintenance Ready"	60 days
Average time from date vacated to lease up of unit	106 days

Attachments

These items have been prepared by the Framingham 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.



Maintenance Plan

Program and Procedures

1. Introduction

This document outlines the Framingham Housing Authority's (FHA) maintenance program and procedures.

DESCRIPTION OF FHA DEVELOPMENTS:

A. 667

667-2 Everit Ave, John J. Gallagher Drive, 130 Grant Street

667-3 Arsenal Road

667-4 Arsenal Road

667-5 Rose Kennedy Lane (even addresses)

667-6 Rose Kennedy Lane (odd addresses)

667-7 Hastings House 115 Cochituate Road, Framingham, MA 01702

667-8 Memorial House 317 Hollis Street, Framingham, MA 01702

B. 200-2

St Lo

Corregidor

Guadalcanal

C. MUSTERFEILD

Anzio

Pearl Harbor

Concord Street

Arsenal

D. 689's

40 Temple Street

85 Alexander Street

24 Underwood Road

E. 705's

705-1- 8/10 Webster Street, 46 Bethany Road, 234-236 Beaver Street

705-2 - (Pelham Properties) managed by Corcoran Management

705-3- Oran Road

F. 28's (Federal)

28-1 Beaver, Carlson and Pusan

28-2 John J. Brady Drive

G. FHDCII Properties

3 Wilmont Road, 1220 Concord Street, 27 Coburn Street, 45/47 Arsenal Road, 55/57 Arsenal Road, 124 Lawrence.

2. Staffing

The FHA has 15 full-time and 0 part-time employees.

3. Tracking of Maintenance Work/Work Orders:

All maintenance work performed by the FHA staff is tracked through a work order system, PHA-Web. Work orders are generated by routine scheduled work, on demand routine and emergency requests from the residents and staff, the results of apartments/building inspections, and the preventive maintenance program.

Work orders are prepared and tracked by computers/tablets from the Administrative Office or on the go via Maintenance staff. Work orders are entered into the system by the administrative/maintenance staff based on maintenance requests received from residents as well as from all other sources. Resident requests are received by telephone calls or walk-in requests at the Maintenance or Administrative Office. For after hours, holiday and weekend emergency problems, the tenants call an emergency number for on-call staff to be notified.

4. Routine Maintenance

The primary routine maintenance tasks at this site are custodial in nature and related to the general cleanliness and appearance of the property and equipment.

Maintenance employees complete a series of scheduled routine tasks on a daily, weekly, and monthly basis to ensure that FHA properties and equipment are well cared for and properly functioning. These tasks strive to maintain the condition of the building exterior, building interior, and all related equipment.

As it pertains to the exterior building, staff will take actions such as power washing trash areas and picking trash from common areas including the playground and picnic area. This ongoing effort is helpful in keeping FHA properties clean and ensuring that all tenants can enjoy a safe living environment.

Regular action will also be taken to ensure that the interiors of FHA buildings are clean for residents. This ongoing effort strives to keep specific areas clean including woodwork, glass on windows and doors, stairways, laundry rooms, and trash areas. Vacuuming also takes place on a regular basis to maintain clean common areas for FHA residents.

Collectively, these routine maintenance tasks help to guarantee a safe, clean, and welcoming environment for tenants to live and go about their daily lives with ease.

A complete list of routine maintenance tasks can be found on attachment A of this manual.

5) Annual Unit Inspections

The Maintenance Director or designee and on staff Housing Inspector will perform an annual inspection of each unit in the property using an inspection form provided by the Authority. All items found during the inspection considered immediate threats to life and property (emergencies) must be initiated or repaired within 24 hours. All other items should be corrected as soon as possible, but in no more than 30 business days. During these inspections, the inspectors may identify trends in the condition of certain building components, these observations should be brought to the attention of the Maintenance Director. The Maintenance Director will also review these inspection forms to make a separate assessment of any unit condition that should be addressed. Any housekeeping concerns observed by maintenance during the annual inspection or any other unit entry should be promptly reported to the administrative staff.

6) Preventive Maintenance

Preventive maintenance is work which must be done to preserve and extend the useful life of materials, building systems, equipment and other elements of the FHA properties and to prevent emergency situations. Due to the complexity of the FHA mechanical systems at this site, preventive maintenance is provided through a combination of outside contractors and FHA staff.

Maintenance staff walks all properties on an annual basis to inspect insect screens, make a list of missing or damaged screens to be repaired or replaced, inspect damaged down spouts, and inspect air conditioning equipment. These actions are paramount to maintaining the condition of all FHA properties.

Staff is tasked with checking all exterior lights each month to ensure that they are properly operating for each building. This is important because it helps maintain a safe environment for tenants.

A series of tasks are completed each year to maintain FHA grounds and landscaping efforts. Mulch is ordered and subsequently delivered to the various properties, seasonal planting takes place, and spring clean ups take place at each unit. This work allows FHA properties to maintain a clean and organized appearance for staff and tenants alike.

There are also a series of actions taken to ensure that the electrical systems are functioning properly without a risk of danger. For example, the generators are tested on an annual basis to verify that they are working in case of an emergency. Elevators are also inspected each year to maintain their working condition and for the safety of residents.

Maintenance staff and mechanics also take preventive measures to maintain the condition of automobiles and small engines owned and operated by the Authority. The trucks used by maintenance staff are checked each month for potential oil changes and inspection stickers. Seasonal equipment including plows, sanders, and salt spreaders are also examined to ensure

that they are fully functional for staff use. Collectively, these preventive tasks help diminish the likelihood of emergencies and strive to guarantee longevity for various tools and materials.

A complete list of preventive maintenance tasks can be found in attachment A of this manual.

The following are contracted out by the FHA:

a) Fire Protection

An outside firm under contract to the Authority maintains the buildings' fire protection system. This firm will test the operation of the system on a semi-annual basis in accordance with the guidelines provided by the National Fire Protection Association. If any maintenance person detects a problem with the system – typically limited to hearing the audible trouble alarm – they should immediately contact the Authority's alarm contractor.

Maintenance of this system by the FHA maintenance staff is limited to assisting the contractor in performing their inspections and responding to assist the Fire Department when an alarm is triggered. At no time should an FHA employee silence or turn off a fire protection system without the express authorization of the Framingham Fire Department.

b) Extermination/Pest Control

The Authority contracts out for all pest related issues. This includes spraying for bees, hornets, wasps or any other flying insects. All resident complaints concerning cockroaches, flying insects, mice or other pests are handled by the Authority's pest control contractor.

Pest control problems are addressed through an integrated pest management approach. This approach is designed to minimize the amount of chemicals used to treat a problem. The contractor will work to identify the harborage point of the infestation and treat it at its source. The contractor may require the assistance of Authority maintenance staff to make any necessary repairs to assist in the control of the problem.

When the maintenance staff becomes aware of a pest problem either through resident or other reports or through their own observation, they should inform the Maintenance Director. The Administrative staff will assist in the preparation of notices to ensure full access for treatment of the problem.

c) Generator Service:

The generators at Hastings, Memorial and John J. Brady Drive administrative office are serviced twice a year by a contractor.

7) Vacancy Turnaround

The Maintenance Director has the primary responsibility of coordinating the maintenance turnaround of units. All efforts will be made to re-occupy a unit within 20-30 business days of the unit becoming vacant.

The terms of the lease require each resident to give the Authority 30 days written notice of their intent to vacate a unit. Residents are directed to provide written notice to the administrative staff. If the administrative staff receives written notice of a tenant's intent to vacate, they will promptly notify the Maintenance Director and the tenant selection staff of the planned move out date.

Experience has shown not all residents provide proper written notice. It is not unheard of for residents to move out without any notice. As the primary regular site presence, maintenance staff should promptly investigate any information concerning someone vacating. If an investigation finds that someone has moved out of their unit without notice, maintenance should immediately notify the administrative staff.

Once a unit is vacant, the Maintenance Director should conduct a move out inspection. The former resident of the unit should be invited to participate in this inspection. The unit will be inspected to determine if there is any damage to the unit beyond normal wear and tear that should be repaired at the expense of the former occupant. In addition, the inspection should identify what repairs will be needed to prepare the unit for re-occupancy. Depending on the workload, the maintenance staff may be expected to paint and clean the apartment, or the work may be contracted out. The Maintenance supervisor will make the determination and coordinate any other outside contractor work needed to complete this turnaround.

The timely re-occupancy of its units is a core part of the Authority's operations. Because of this importance, senior Authority staff will meet on a weekly basis to review occupancy issues in a staff meeting.

The administrative or maintenance staff will show prospective residents' available units. During the presentations, the staff person will make certain to present all the positive aspects of the site and the unit being shown.

Once a new tenant has taken possession of a unit, the administrative staff will conduct a move in inspection. The purpose of this inspection is to take a written snapshot of the condition of the unit at move in. This record will be used to determine if the resident will be held responsible for any excess wear and tear or damage to the unit identified during annual or move out inspections.

8) Maintenance Charges

The Authority does use a Schedule of Standard Maintenance Charges (attachment C) to assess a resident for maintenance related work. When maintenance repairs are determined to be

required because of resident/guest abuse or misuse, the resident is charged the actual Authority costs to make the repair. The charges will vary due to the amount of time of the repair (regular or after hours), the hourly rate of the person making the repairs, and the materials involved. The maintenance employee who completed the work will indicate whether they feel an item should be a resident charge on the work order. A copy of this work order will be forwarded to the administrative office for a final calculation of the charge for the repair.

A written itemized bill will be sent to resident. Failure to promptly pay a maintenance charge or enter into and keep a repayment agreement for said charge is grounds for eviction. A resident may appeal the assessment of a maintenance charge to the Public Housing Director or designee and may also appeal this charge through the grievance process.

9) Definition of Maintenance Emergencies

A maintenance emergency refers to when a building's residents or Authority staff are faced with a health or life-threatening situation or if there is a building condition that will result in serious structural or systems damage if it is not repaired immediately.

The Authority considers the following items maintenance emergencies:

- Fires of any kind (Call 911)
- Gas leaks / Gas odor (Call 911)
- Electric power failures
- 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 / Heating system does not work
- No Hot water
- Snow or ice storm
- Dangerous structural defects
- Inoperable Smoke / CO detectors, beeping or chirping
- Elevator stoppage, entrapment
- Inoperable emergency lighting or exit signs
- Inoperative refrigerator or Stove
- Blocked egress /exits
- Blocked electrical panel
- Exposed wires, Unsecured or missing covers, open breaker port, missing knockouts
- Call for Aide not working or cord missing, blocked, tied up or does not reach to floor
- Clogged sink, toilet, or drain, Sewer odor
- Heater / Exhaust system leaking dangerous gases

- GFCI Outlet is inoperable
- Evidence of Leak/Mold/Mildew
- Window will not stay up, Window will not lock, Broken Windowpane
- Flammables improperly stored
- Excessive garbage in area not designated for storage
- Infestation of Rodents or Insects
- Sharp edges that could pose a cutting hazard
- Tripping hazards
- Leaking pipes
- Drip legs do not extend within 12" of floor
- Door hardware is inoperable
- Self-closing door does not latch
- Risk of falling chimney pieces
- No running water in unit or building
- Elevator inoperable
- Fire Extinguisher expired / Fire Sprinkler components missing or damaged
- Fire Alarm Control Panel System Trouble

Attachment D: contains this list and a handout given to residents upon signing a lease.

10) Deferred Maintenance;

Work orders will be deferred if:

- a. if items may be best completed if the unit is vacant
- b. If the item is a season item
- c. lack of funding
- d. efficiency (where it is easier to group common tasks together to a larger project)
- e. organizational upkeep tasks
- f. if the work shall be part of a larger Modernization Project.

The FHA will keep a list of deferred maintenance items with the following information:

1. Item
2. Date added to Deferred Maintenance Plan
3. Item Description
4. Location and/or unit#
5. Reason Deferred
6. Estimated Costs
7. Materials Needed
8. Original Work order#
9. Target Completion Date
10. Actual Completion Date
11. Other Comments

ATTACHMENT A

Routine Maintenance Schedule and Checklist														
LHA NAME: Framingham Housing Authority							All Developments							
Landscaping and Grounds Routine Maintenance														
Building Exterior														
TASK	Frequency	By	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Power Wash Trucks	Weekly	Staff	X	X			X	X	X	X				
Power Wash Musterfield Trash Areas	Monthly	Staff					X	X	X	X				
Musterfield Playground/Picnic Area Picked Up	Daily	Staff					X	X	X	X	X			
Clean main drain on Anzio Road	Monthly	Staff	X				X				X			
Building Routine Maintenance														
Building Interior														
TASK	Frequency	By	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Common Areas 667-3 & 667-4 Clean Landings	Monthly	Staff	X		X		X		X		X		X	
Common Areas 667-3 & 667-4 Wipe down wood work	Monthly	Staff	X		X		X		X		X		X	
Common Areas 667-3 & 667-4 Clean glass on windows, front/back of doors	Monthly	Staff	X		X		X		X		X		X	
Common Areas 667-3 & 667-4 Clean windows in the hallways	Monthly	Staff	X		X		X		X		X		X	
RKL&667-2 - clean landings	Monthly	Staff		X		X		X		X		X		X
RKL&667-2 - wipe down wood work	Monthly	Staff		X		X		X		X		X		X
RKL&667-2 - clean glass on windows/doors (front & back)	Monthly	Staff		X		X		X		X		X		X
RKL&667-2 - clean windows in hallways	Monthly	Staff		X		X		X		X		X		X
JJB Common Area - vacuum	Monthly	Staff	X				X		X		X		X	
JJB Common Area - glass cleaned (front/back)	Monthly	Staff	X				X		X		X		X	
JJB Common Area - windows cleaned	Monthly	Staff	X				X		X		X		X	
JJB Common Area - stairways cleaned	Monthly	Staff	X				X		X		X		X	

Routine Maintenance Schedule and Checklist

LHA NAME: Framingham Housing Authority			All Developments												
Cleaning laundry rooms at Arsenal/JJB/RKL/Everit Ave	Weekly	Staff	X	X	X	X	X	X	X	X	X	X	X	X	X
Trash removal	Per schedule	Staff	X	X	X	X	X	X	X	X	X	X	X	X	X
Clean all laundry rooms	Per schedule	Staff	X	X	X	X	X	X	X	X	X	X	X	X	X
Other:															
Have a safety meeting	Monthly	Staff	X	X	X	X	X	X	X	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: Framingham Housing Authority

All Developments

Buildings & Grounds Preventive Maintenance

Building Exterior

TASK	Frequency	By	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Exterior Dryer vent cleaning John J. Brady Drive	Annually	Staff		X										
Remove AC Covers 28-2 JJB (Week of Marathon Monday)	Annually	Staff				X								
Walk all Properties and Inspect Insect Screens, Make List of Missing/Damaged Screens and Replace/Repair as Needed	Annually	Staff				X								
Inspect Properties for Damaged Down Spouts & Gutters/Repair as Needed	Annually	Staff				X								
Inspect All AC Equip. in All Locations (service if needed)	Annually	Staff					X							
1 Hour Check Exterior Lights For Proper Operation	Monthly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Exterior Painting at 667-3 and 667-4 Incl. Railings/Benches	Annually	Staff							X					

Building Interior

Inspect Hastings Garage Floor (Determine Need for Reseal)	Annually	Staff										X		
Daylight Savings - make sure clocks are set	Bi-Annually	Staff			X								X	
Heavy Cleaning of Main Office	Annually	Staff		X										

Buildings & Grounds Preventive Maintenance

TASK	Frequency	By	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
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Preventive Maintenance Schedule and Checklist

Preventive Maintenance Schedule and Checklist															
LHA NAME: Framingham Housing Authority			All Developments												
Trash / Recycling Room															
Inspect All Trash Areas for Needed Fence Repairs (St. Lo)	Annually	Staff				X									
Maguire Equip.both trash compactors (Hastings/Memorial)	Annually	Staff			X										
Power Wash Trash Shutes - Hastings/Memorial	Annually	Staff		X											
Landscaping															
Plant Pansies/Other Seasonal Plantings All Locations	Annually	Staff					X								
Seasonal Plantings Switch at Musterfield	Annually	Staff							X						
Plant "Fall" Flowers at All Locations - Last Week	Annually	Staff										X			
Mount Leaf Vac for Leaf Collection	Annually	Staff											X		
Go Thru All Landscape Contractors for Spring Clean Ups	Annually	Staff				X									
Order and Deliver Mulch	Annually	Staff				X									
Grounds															
Grounds Crew Start Following Grass Cutting Schedule	Annually	Staff					X								
Grounds Crew Work at All Locations	Annually	Staff					X								
Inspect All Flags/Replace if Nec. - Week Before Mem. Day	Annually	Staff					X								
Clear Debris From Drying Yard at 28-1	Annually	Staff												X	
Check all grounds for sticks/heavy branches	Annually	Staff			X										
Send Water Truck Out (discretion Director of Maintenance)	Monthly	Staff						X	X	X	X	X	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	

Preventive Maintenance Schedule and Checklist

LHA NAME: Framingham Housing Authority			All Developments												
Inspect/Clean All Boilers Beaver, Carlson, Pusan (28-1)	Annually	Staff									X				
Plumbing															
Install Water Tank	Annually	Staff					X								
Irrigation Turned On/Tested - Irrigation Vendor 1st Week	Annually	Staff					X								
(Musterfield) Exercise Leonard Valves	Monthly	Staff	X	X	X	X	X	X	X	X	X	X	X	X	X
Spray Park - test the back flow preventer and make sure it is ready to go for the warm weather	Annually	Staff/Town					X								
Electrical system															
Load Test Generators Hastings/Memorial/Main Office	Annually	Staff												X	
Sweep clean all hot water/electrical rooms	Annually	Staff	X												
Check all hot water/electrical rooms for debris	Annually	Staff	X												
Elevator Inspections Memorial/Hastings/Main office	Annually	Staff				X									
Generators at Hastings/Memorial/Main Office	Annually	Staff				X									
Month End - Generator PM Schedule Hastings/Memorial JJB	Annually	Staff											X		

Preventive Maintenance Schedule and Checklist

LHA NAME: Framingham Housing Authority

All Developments

Machine Preventive Maintenance

Automobile														
TASK	Frequency	By	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Check for oil changes/inspection stickers on trucks	Monthly	Mechanic	X	X	X	X	X	X	X	X	X	X	X	X

Small Engines														
Bring all spring equipment to maint. mechanic for repairs	Annually	Staff			X									
Wash All Plows and Snow Equipment for Storage (add fuel stabilizer when required)	Annually	Staff				X								
Wash/Put Away Sanders and Salt Spreaders From Trucks	Annually	Staff				X								
Clear and clean salt bins	Annually	Staff				X								
Service all snow equipment	Weekly	Staff	X											

Other

Meetings														
TASK	Frequency	By	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Meet with Fleet Mechanic to Discuss What Needs to be Ordered for Winter Months/What Large Repairs are Needed for Existing Equipment	Annually	Staff								X				

ATTACHMENT B

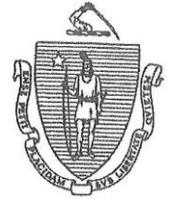


FRAMINGHAM HOUSING AUTHORITY

1 John J. Brady Drive
Framingham, MA 01702-2300

Charges for Maintenance Repairs

Approved by the Board May 13, 2013



PAUL LANDERS
EXECUTIVE DIRECTOR

TELEPHONE (508) 879-7562
Fax (508) 626-0252

TTY RELAY SERVICE 711

COMMISSIONERS:

JANET LEOMBRUNO
PHYLLIS A. MAY
ROBERT L. MERUSI
JANICE M. ROGERS
STEPHEN P. STARR

<u>Item</u>	<u>Price</u>
Screen Door	\$250.00
Rescreen Door	\$50.00
Window Screen	\$35.00
Rescreen Window	\$15.00
Broken Window	\$8.00 per sq. ft. of glass
Inside Door Glass	\$125.00
New Locks	\$125.00
New Locks 200-1/2	\$200.00
Rekey Locks	\$25.00
Rekey Locks 200-1/2	\$50.00
Extra Set of Keys	\$15.00
Lockout	\$40.00 (Approved by Board on 5.13.13)
Countertop Replacement	\$18.00 per sq. ft.
Garbage Disposal Replacement	\$250.00 or actual cost
Outside Debris Removal	ACTUAL COST
Thermostat	Specific cost by development
Light Bulb (Replacement)	\$5.00 (Approved by Board on 11.14.11)
Paint (Gallon)	\$15.00

- Removal of any items from your unit will be charged according to an hourly wage for each employee used.
- Labor charges will be added to any unnecessary tasks not due to usual wear and use by tenant.
- Any unreported damage noted by the FHA and not reported by the tenant shall be repaired and charged accordingly.
- Any damages not listed on this sheet will be charged according to fair labor and material cost to repair the item.
- All charges must be PAID at the Housing Authority Office within 10 days of the billing date.

PL 5/13/13



EQUAL HOUSING OPPORTUNITY

ATTACHMENT C

If you have a medical, police, or fire emergency, you need to contact 911 immediately.

Emergency definition and lists

Definition of a maintenance emergency – **A condition that is immediately threatening to the life and safety of residents, staff, or structures.**

The following is the minimum list of emergencies that should be called out to maintenance for immediate repair:

Examples of Emergencies to be called to maintenance

- | | |
|--|--|
| <ul style="list-style-type: none">• Fires of any kind (Call 911)• Gas leaks or Gas odor (Call 911)• Electric power failures• Electrical hazards, sparking outlets• Broken water pipes or flooding• No water or unsafe water• Sewer or toilet blockage• Roof leaks• Lock outs | <ul style="list-style-type: none">• Door or Window lock failure• No heat• No Hot water• Snow or ice storm• Dangerous structural conditions• Inoperable Smoke or CO detectors, beeping or chirping detectors• Elevator stoppage or entrapment |
|--|--|

If a tenant has an emergency during normal business hours they should call **508-872-0422**. If a tenant has an emergency after hours, weekends, or holidays, they should contact the Framingham Housing Authority **Answering Service at 508-872-0422**. The answering service will contact a member of our staff to respond to the emergency.

IF you have a medical, police or fire emergency, you need to call 911 immediately

Framingham Housing Authority Deferred Work Order Report

Filter Criteria Includes: 1) Project: All Projects, 2) Deferred Type: All Types, 3) Deferred Note: N/A, 4) Completed: 1/1/2022 to 12/31/2022

Work Order Number	Completed Date/Time	Deferred Note	Deferred Type
70026	1/6/2022 4:00 PM	painter project	Deferred Maintenance Plan
70722	3/2/2022 4:00 PM	Beaver PHASE I	Capital Improvement Plan
70725	3/2/2022 4:00 PM	Beaver PHASE I	Capital Improvement Plan
70989	3/29/2022 4:02 PM	Beaver project	Capital Improvement Plan
70990	3/29/2022 4:03 PM	Beaver project	Capital Improvement Plan
71178	4/13/2022 4:00 PM	Beaver project Phase 1	Capital Improvement Plan
71179	4/13/2022 4:00 PM	Beaver project Phase 1	Capital Improvement Plan
71385	5/2/2022 4:00 PM	Beaver Phase 1	Capital Improvement Plan
71386	5/2/2022 4:00 PM	Beaver Phase 1	Capital Improvement Plan
71387	5/2/2022 4:00 PM	Beaver Phase 1	Capital Improvement Plan
71645	10/21/2022 3:45 PM	Floor Project	Deferred Maintenance Plan
71910	6/6/2022 10:07 AM	Beaver StPHASE 1	Capital Improvement Plan
71911	6/6/2022 10:10 AM	Beaver St Phase 1	Capital Improvement Plan
71945	6/6/2022 11:14 AM	Beaver St PHASE 1	Capital Improvement Plan
71969	6/8/2022 10:22 AM	Beaver PHASE 1	Capital Improvement Plan
72055	6/17/2022 4:00 PM	Beaver St PHASE 1	Capital Improvement Plan
72056	6/17/2022 4:00 PM	Beaver St PHASE 1	Capital Improvement Plan
72057	6/17/2022 4:00 PM	Beaver St PHASE 1	Capital Improvement Plan
72058	6/17/2022 4:00 PM	Beaver St PHASE 1	Capital Improvement Plan
72125	6/24/2022 9:47 AM	Beaver St PHASE 1	Capital Improvement Plan
72154	6/28/2022 11:49 AM	Beaver St PHASE 1	Capital Improvement Plan
72273	7/8/2022 11:48 AM	Beaver st PHASE 1	Capital Improvement Plan
72274	7/8/2022 11:49 AM	Beaver St-PHASE 1	Capital Improvement Plan
72275	7/8/2022 11:51 AM	Beaver St- PHASE 1	Capital Improvement Plan
72276	7/8/2022 11:52 AM	Beaver St-PHASE 1	Capital Improvement Plan
72513	7/26/2022 4:00 PM	Beaver St-Phase 1	Capital Improvement Plan
72514	7/26/2022 4:00 PM	Beaver St- Phase 1	Capital Improvement Plan
72515	7/26/2022 4:00 PM	Beaver St-Phase 1	Capital Improvement Plan
72516	7/26/2022 4:00 PM	Beaver St- Phase 1	Capital Improvement Plan
72547	7/29/2022 4:00 PM	Beaver St-Phase 1	Capital Improvement Plan
72702	8/8/2022 11:10 AM	Beaver St-Phase 1	Capital Improvement Plan
72703	8/8/2022 11:20 AM	Beaver St- Phase 1	Capital Improvement Plan
72752	8/11/2022 4:00 PM	Beaver St- Phase 1	Capital Improvement Plan
72753	8/11/2022 4:00 PM	Beaver St-Phase 1	Capital Improvement Plan
72754	8/11/2022 4:00 PM	Beaver St-Phase 1	Capital Improvement Plan
72900	8/19/2022 9:37 AM	Beaver St-Phase 1	Capital Improvement Plan
72901	8/19/2022 9:40 AM	Beaver St-Phase 1	Capital Improvement Plan
72902	8/19/2022 9:43 AM	Beaver St-Phase 1	Capital Improvement Plan
73138	9/6/2022 1:47 PM	Beaver St-Phase 1	Capital Improvement Plan
73139	9/6/2022 2:03 PM	Beaver St- Phase 1	Capital Improvement Plan
73140	9/6/2022 2:14 PM	Beaver St-Phase 1	Capital Improvement Plan
73141	9/6/2022 2:16 PM	Beaver St-PHASE I	Capital Improvement Plan
73315	9/16/2022 2:08 PM	B	Capital Improvement Plan
73316	9/16/2022 2:25 PM	Beaver St- Phase 1	Capital Improvement Plan
73635	10/13/2022 3:20 PM	Beaver St-Phase 1	Capital Improvement Plan
73636	10/13/2022 3:21 PM	Beaver St-Phase 1	Capital Improvement Plan
73637	10/13/2022 3:21 PM	Beaver St- Phase 1	Capital Improvement Plan
73638	10/13/2022 3:36 PM	Beaver St-Phase 1	Capital Improvement Plan
73706	10/21/2022 3:25 PM	Beaver st- Phase1	Capital Improvement Plan
73794	11/1/2022 1:30 PM	Beaver St-Phase 1	Capital Improvement Plan

Framingham Housing Authority Deferred Work Order Report

Filter Criteria Includes: 1) Project: All Projects, 2) Deferred Type: All Types, 3) Deferred Note: N/A, 4) Completed: 1/1/2022 to 12/31/2022

73804	11/3/2022 8:00 AM	Beaver St- Phase1	Capital Improvement Plan
73805	11/3/2022 8:00 AM	Beaver St- Phase1	Capital Improvement Plan
73806	11/3/2022 8:00 AM	Beaver St- Phase1	Capital Improvement Plan
73807	11/3/2022 8:00 AM	Beaver St- Phase1	Capital Improvement Plan
73808	11/3/2022 8:00 AM	Beaver St- Phase1	Capital Improvement Plan
73809	11/3/2022 8:00 AM	Beaver St- Phase1	Capital Improvement Plan
74108	11/21/2022 8:13 AM	Beaver St-Phase 1	Capital Improvement Plan
74109	11/21/2022 8:35 AM	Beaver St- Phase 1	Capital Improvement Plan
74346	12/7/2022 4:00 PM	Beaver St- Phase 1	Capital Improvement Plan
74888	12/29/2022 4:00 PM	Beaver St- Phase1	Capital Improvement Plan
74889	12/29/2022 4:00 PM	Beaver St- Phase1	Capital Improvement Plan
74890	10/21/2022 4:00 PM	Beaver St- Phase 1	Capital Improvement Plan
74891	12/27/2022 8:00 AM	Beaver St- Phase1	Capital Improvement Plan
74892	12/20/2022 4:00 PM	Beaver St- Phase1	Capital Improvement Plan
74898	12/12/2022 4:00 PM	Beaver St- Phase1	Capital Improvement Plan

End of Report

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 12/31/2022. It also shows the approved budget for the current year (2023) 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 Department of Housing and Community Development (DHCD). 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, except as noted in the list of budgets below.

Budgets included in this Annual Plan:

1. Consolidated Budget (400-1) for all state-aided 667 (Elderly), 200 (family), and 705 (scattered site family) developments owned by Framingham Housing Authority , except as noted for separate budgets on the following pages.
2. The Musterfield At Concord Place
3. Scattered Site - Beaver Gardens/Beaver Park

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 DHCD 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 DHCD.

DHCD 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 DHCD 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 DHCD and obtain its approval.

The Framingham Housing Authority operating reserve at the end of fiscal year 2022 was \$15,888,703.00, which is 736.5% 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 Framingham Housing Authority , except as noted for separate budgets on the following pages.						
REVENUE						
Account Number	Account Class	2022 Approved Revenue Budget	2022 Actual Amounts Received	2023 Approved Revenue Budget	% Change from 2022 Actual to 2023 Budget	2023 Dollars Budgeted per Unit per Month
3110	Shelter Rent - Tenants	\$2,881,728.00	\$2,883,520.00	\$2,893,816.00	0.4%	\$383.39
3111	Shelter Rent - Tenants - Fraud/Retroactive	\$0.00	\$0.00	\$0.00	0%	\$0.00
3115	Shelter Rent - Federal Section 8	\$0.00	\$0.00	\$0.00	0%	\$0.00
3190	Nondwelling Rentals	\$0.00	\$0.00	\$0.00	0%	\$0.00
3400	Administrative Fee - MRVP	\$0.00	\$0.00	\$0.00	0%	\$0.00
3610	Interest on Investments - Unrestricted	\$170.00	\$209.00	\$170.00	-18.7%	\$0.02
3611	Interest on Investments - Restricted	\$21,083.00	\$1,009,295.00	\$20,530.00	-98%	\$2.72
3690	Other Revenue	\$18,000.00	\$279,566.00	\$18,300.00	-93.5%	\$2.42
3691	Other Revenue - Retained	\$166,407.00	\$288,117.00	\$215,000.00	-25.4%	\$28.48
3692	Other Revenue - Operating Reserves	\$0.00	\$0.00	\$0.00	0%	\$0.00
3693	Other Revenue - Energy Net Meter	\$166,407.00	\$0.00	\$215,000.00	100%	\$28.48
3801	Operating Subsidy - DHCD (4001)	\$1,102,601.00	\$915,750.00	\$1,304,013.00	42.4%	\$172.76
3802	Operating Subsidy - MRVP Landlords	\$0.00	\$0.00	\$0.00	0%	\$0.00
3803	Restricted Grants Received	\$0.00	\$0.00	\$0.00	0%	\$0.00
3920	Gain/Loss From Sale/Disp. of Prop.	\$0.00	\$0.00	\$0.00	0%	\$0.00
3000	TOTAL REVENUE	\$4,356,396.00	\$5,376,457.00	\$4,666,829.00	-13.2%	\$618.29

Consolidated Budget (400-1) for all state-aided 667 (Elderly), 200 (family), and 705 (scattered site family) developments owned by Framingham Housing Authority , except as noted for separate budgets on the following pages.						
EXPENSES						
Account Number	Account Class	2022 Approved Expense Budget	2022 Actual Amounts Spent	2023 Approved Expense Budget	% Change from 2022 Actual to 2023 Budget.	2023 Dollars Budgeted per Unit per Month
4110	Administrative Salaries	\$461,872.00	\$453,171.00	\$484,965.00	7%	\$64.25
4120	Compensated Absences	\$0.00	\$16,606.00	\$0.00	-100%	\$0.00
4130	Legal	\$30,000.00	\$34,142.00	\$30,000.00	-12.1%	\$3.97
4140	Members Compensation	\$23,000.00	\$21,329.00	\$23,000.00	7.8%	\$3.05
4150	Travel & Related Expenses	\$4,695.00	\$115.00	\$4,669.00	3960%	\$0.62
4170	Accounting Services	\$7,600.00	\$7,953.00	\$7,600.00	-4.4%	\$1.01
4171	Audit Costs	\$10,500.00	\$18,461.00	\$14,472.00	-21.6%	\$1.92
4180	Penalties & Interest	\$0.00	\$0.00	\$0.00	0%	\$0.00
4190	Administrative Other	\$96,361.00	\$95,023.00	\$109,603.00	15.3%	\$14.52
4191	Tenant Organization	\$4,961.00	\$12,629.00	\$13,000.00	2.9%	\$1.72
4100	TOTAL ADMINISTRATION	\$638,989.00	\$659,429.00	\$687,309.00	4.2%	\$91.06
4310	Water	\$625,134.00	\$589,880.00	\$625,134.00	6%	\$82.82
4320	Electricity	\$702,084.00	\$646,996.00	\$702,084.00	8.5%	\$93.02
4330	Gas	\$74,683.00	\$88,120.00	\$80,000.00	-9.2%	\$10.60
4340	Fuel	\$0.00	\$0.00	\$0.00	0%	\$0.00
4360	Net Meter Utility Debit/Energy Conservation	\$332,816.00	\$520,812.00	\$451,260.00	-13.4%	\$59.79
4390	Other	\$0.00	\$-520,812.00	\$0.00	-100%	\$0.00
4391	Solar Operator Costs	\$235,190.00	\$0.00	\$238,740.00	100%	\$31.63
4392	Net Meter Utility Credit (Negative Amount)	\$-568,006.00	\$0.00	\$-690,000.0	-100%	\$-91.41
4300	TOTAL UTILITIES	\$1,401,901.0	\$1,324,996.0	\$1,407,218.	6.2%	\$186.44

Consolidated Budget (400-1) for all state-aided 667 (Elderly), 200 (family), and 705 (scattered site family) developments owned by Framingham Housing Authority , except as noted for separate budgets on the following pages.						
EXPENSES						
Account Number	Account Class	2022 Approved Expense Budget	2022 Actual Amounts Spent	2023 Approved Expense Budget	% Change from 2022 Actual to 2023 Budget	2023 Dollars Budgeted per Unit per Month
4410	Maintenance Labor	\$656,068.00	\$642,594.00	\$688,871.00	7.2%	\$91.27
4420	Materials & Supplies	\$222,615.00	\$275,442.00	\$275,000.00	-0.2%	\$36.43
4430	Contract Costs	\$447,672.00	\$450,550.00	\$470,000.00	4.3%	\$62.27
4400	TOTAL MAINTENANCE	\$1,326,355.00	\$1,368,586.00	\$1,433,871.00	4.8%	\$189.97
4510	Insurance	\$167,632.00	\$177,946.00	\$194,951.00	9.6%	\$25.83
4520	Payment in Lieu of Taxes	\$5,269.00	\$5,263.00	\$5,269.00	0.1%	\$0.70
4540	Employee Benefits	\$573,604.00	\$532,069.00	\$585,566.00	10.1%	\$77.58
4541	Employee Benefits - GASB 45	\$0.00	\$383,155.00	\$0.00	-100%	\$0.00
4542	Pension Expense - GASB 68	\$0.00	\$0.00	\$0.00	0%	\$0.00
4570	Collection Loss	\$5,000.00	\$35,404.00	\$5,000.00	-85.9%	\$0.66
4571	Collection Loss - Fraud/Retroactive	\$0.00	\$311.00	\$0.00	-100%	\$0.00
4580	Interest Expense	\$0.00	\$3,323.00	\$0.00	-100%	\$0.00
4590	Other General Expense	\$30,646.00	\$30,646.00	\$50,000.00	63.2%	\$6.62
4500	TOTAL GENERAL EXPENSES	\$782,151.00	\$1,168,117.00	\$840,786.00	-28%	\$111.39
4610	Extraordinary Maintenance	\$95,000.00	\$121,454.00	\$130,000.00	7%	\$17.22
4611	Equipment Purchases - Non Capitalized	\$25,000.00	\$54,972.00	\$35,000.00	-36.3%	\$4.64
4612	Restricted Reserve Expenditures	\$0.00	\$0.00	\$0.00	0%	\$0.00
4715	Housing Assistance Payments	\$0.00	\$0.00	\$0.00	0%	\$0.00
4801	Depreciation Expense	\$0.00	\$829,958.00	\$0.00	-100%	\$0.00
4600	TOTAL OTHER EXPENSES	\$120,000.00	\$1,006,384.00	\$165,000.00	-83.6%	\$21.86
4000	TOTAL EXPENSES	\$4,269,396.00	\$5,527,512.00	\$4,534,184.00	-18%	\$600.71

Consolidated Budget (400-1) for all state-aided 667 (Elderly), 200 (family), and 705 (scattered site family) developments owned by Framingham Housing Authority , except as noted for separate budgets on the following pages.						
SUMMARY						
Account Number	Account Class	2022 Approved Budget	2022 Actual Amounts	2023 Approved Budget	% Change from 2022 Actual to 2023 Budget	2023 Dollars Budgeted per Unit per Month
3000	TOTAL REVENUE	\$4,356,396.00	\$5,376,457.00	\$4,666,829.00	-13.2%	\$618.29
4000	TOTAL EXPENSES	\$4,269,396.00	\$5,527,512.00	\$4,534,184.00	-18%	\$600.71
2700	NET INCOME (DEFICIT)	\$87,000.00	\$-151,055.00	\$132,645.00	-187.8%	\$17.57
7520	Replacements of Equip. - Capitalized	\$75,100.00	\$40,958.00	\$56,500.00	37.9%	\$7.49
7540	Betterments & Additions - Capitalized	\$120,000.00	\$14,000.00	\$130,000.00	828.6%	\$17.22
7500	TOTAL NONOPERATING EXPENDITURES	\$195,100.00	\$54,958.00	\$186,500.00	239.4%	\$24.71
7600	EXCESS REVENUE OVER EXPENSES	\$-108,100.00	\$-206,013.00	\$-53,855.00	-73.9%	\$-7.14

The Musterfield At Concord Place						
REVENUE						
Account Number	Account Class	2022 Approved Revenue Budget	2022 Actual Amounts Received	2023 Approved Revenue Budget	% Change from 2022 Actual to 2023 Budget	2023 Dollars Budgeted per Unit per Month
3110	Shelter Rent - Tenants	\$873,768.00	\$905,332.00	\$873,768.00	-3.5%	\$661.95
3111	Shelter Rent - Tenants - Fraud/Retroactive	\$0.00	\$0.00	\$0.00	0%	\$0.00
3115	Shelter Rent - Federal Section 8	\$0.00	\$0.00	\$0.00	0%	\$0.00
3190	Nondwelling Rentals	\$0.00	\$0.00	\$0.00	0%	\$0.00
3400	Administrative Fee - MRVP	\$0.00	\$0.00	\$0.00	0%	\$0.00
3610	Interest on Investments - Unrestricted	\$0.00	\$0.00	\$0.00	0%	\$0.00
3611	Interest on Investments - Restricted	\$0.00	\$1.00	\$0.00	-100%	\$0.00
3690	Other Revenue	\$30,861.00	\$0.00	\$32,717.00	0%	\$24.79
3691	Other Revenue - Retained	\$0.00	\$51,090.00	\$0.00	-100%	\$0.00
3692	Other Revenue - Operating Reserves	\$0.00	\$0.00	\$0.00	0%	\$0.00
3693	Other Revenue - Energy Net Meter	\$0.00	\$0.00	\$0.00	0%	\$0.00
3801	Operating Subsidy - DHCD (4001)	\$435,999.00	\$580,875.00	\$554,800.00	-4.5%	\$420.30
3802	Operating Subsidy - MRVP Landlords	\$0.00	\$0.00	\$0.00	0%	\$0.00
3803	Restricted Grants Received	\$0.00	\$0.00	\$0.00	0%	\$0.00
3920	Gain/Loss From Sale/Disp. of Prop.	\$0.00	\$0.00	\$0.00	0%	\$0.00
3000	TOTAL REVENUE	\$1,340,628.00	\$1,537,298.00	\$1,461,285.00	-4.9%	\$1,107.03

The Musterfield At Concord Place						
EXPENSES						
Account Number	Account Class	2022 Approved Expense Budget	2022 Actual Amounts Spent	2023 Approved Expense Budget	% Change from 2022 Actual to 2023 Budget	2023 Dollars Budgeted per Unit per Month
4110	Administrative Salaries	\$162,332.00	\$162.332.00	\$170,449.00	5%	\$129.13
4120	Compensated Absences	\$0.00	\$0.00	\$0.00	0%	\$0.00
4130	Legal	\$10,314.00	\$5,692.00	\$11,242.00	97.5%	\$8.52
4140	Members Compensation	\$0.00	\$0.00	\$0.00	0%	\$0.00
4150	Travel & Related Expenses	\$0.00	\$0.00	\$0.00	0%	\$0.00
4170	Accounting Services	\$50,668.00	\$32,661.00	\$55,228.00	69.1%	\$41.84
4171	Audit Costs	\$15,175.00	\$18,813.00	\$16,541.00	-12.1%	\$12.53
4180	Penalties & Interest	\$0.00	\$0.00	\$0.00	0%	\$0.00
4190	Administrative Other	\$62,846.00	\$60,956.00	\$63,385.00	4%	\$48.02
4191	Tenant Organization	\$55,200.00	\$62,583.00	\$55,200.00	-11.8%	\$41.82
4100	TOTAL ADMINISTRATION	\$356,535.00	\$343,037.00	\$372,045.00	8.5%	\$281.85
4310	Water	\$273,889.00	\$401,467.00	\$318,461.00	-20.7%	\$241.26
4320	Electricity	\$16,211.00	\$22,595.00	\$17,670.00	-21.8%	\$13.39
4330	Gas	\$67,168.00	\$78,786.00	\$73,213.00	-7.1%	\$55.46
4340	Fuel	\$0.00	\$0.00	\$0.00	0%	\$0.00
4360	Net Meter Utility Debit/Energy Conservation	\$0.00	\$0.00	\$0.00	0%	\$0.00
4390	Other	\$0.00	\$0.00	\$0.00	0%	\$0.00
4391	Solar Operator Costs	\$0.00	\$0.00	\$0.00	0%	\$0.00
4392	Net Meter Utility Credit (Negative Amount)	\$0.00	\$0.00	\$0.00	0%	\$0.00
4300	TOTAL UTILITIES	\$357,268.00	\$502,848.00	\$409,344.00	-18.6%	\$310.11

The Musterfield At Concord Place						
EXPENSES						
Account Number	Account Class	2022 Approved Expense Budget	2022 Actual Amounts Spent	2023 Approved Expense Budget	% Change from 2022 Actual to 2023 Spent	2023 Dollars Budgeted per Unit per Month
4410	Maintenance Labor	\$157,945.00	\$157,945.00	\$165,842.00	5%	\$125.64
4420	Materials & Supplies	\$20,431.00	\$19,206.00	\$25,000.00	30.2%	\$18.94
4430	Contract Costs	\$118,566.00	\$112,695.00	\$131,823.00	17%	\$99.87
4400	TOTAL MAINTENANCE	\$296,942.00	\$289,846.00	\$322,665.00	11.3%	\$244.44
4510	Insurance	\$123,553.00	\$128,176.00	\$140,553.00	9.7%	\$106.48
4520	Payment in Lieu of Taxes	\$3,960.00	\$3,960.00	\$3,960.00	0%	\$3.00
4540	Employee Benefits	\$131,755.00	\$131,754.00	\$138,343.00	5%	\$104.81
4541	Employee Benefits - GASB 45	\$0.00	\$0.00	\$0.00	0%	\$0.00
4542	Pension Expense - GASB 68	\$0.00	\$0.00	\$0.00	0%	\$0.00
4570	Collection Loss	\$0.00	\$632.00	\$0.00	-100%	\$0.00
4571	Collection Loss - Fraud/Retroactive	\$0.00	\$0.00	\$0.00	0%	\$0.00
4580	Interest Expense	\$0.00	\$503,903.00	\$0.00	-100%	\$0.00
4590	Other General Expense	\$57,777.00	\$16,523.00	\$59,375.00	259.3%	\$44.98
4500	TOTAL GENERAL EXPENSES	\$317,045.00	\$784,948.00	\$342,231.00	-56.4%	\$259.27
4610	Extraordinary Maintenance	\$0.00	\$4,150.00	\$0.00	-100%	\$0.00
4611	Equipment Purchases - Non Capitalized	\$12,838.00	\$10,902.00	\$15,000.00	37.6%	\$11.36
4612	Restricted Reserve Expenditures	\$0.00	\$0.00	\$0.00	0%	\$0.00
4715	Housing Assistance Payments	\$0.00	\$0.00	\$0.00	0%	\$0.00
4801	Depreciation Expense	\$0.00	\$1,050,166.00	\$0.00	-100%	\$0.00
4600	TOTAL OTHER EXPENSES	\$12,838.00	\$1,065,218.00	\$15,000.00	-98.6%	\$11.36
4000	TOTAL EXPENSES	\$1,340,628.00	\$2,985,897.00	\$1,461,285.00	-51.1%	\$1,107.03

The Musterfield At Concord Place						
SUMMARY						
Account Number	Account Class	2022 Approved Budget	2022 Actual Amounts	2023 Approved Budget	% Change from 2022 Actual to 2023 Budget	2023 Dollars Budgeted per Unit per Month
3000	TOTAL REVENUE	\$1,340,628.00	\$1,537,298.00	\$1,461,285.00	-4.9%	\$1.107.03
4000	TOTAL EXPENSES	\$1,340,628.00	\$2,985,897.00	\$1,461,285.00	-51.1%	\$1.107.03
2700	NET INCOME (DEFICIT)	\$0.00	\$-1,448,599.00	\$0.00	-100%	\$0.00
7520	Replacements of Equip. - Capitalized	\$0.00	\$0.00	\$0.00	0%	\$0.00
7540	Betterments & Additions - Capitalized	\$0.00	\$2,200.00	\$0.00	-100%	\$0.00
7500	TOTAL NONOPERATING EXPENDITURES	\$0.00	\$2,200.00	\$0.00	-100%	\$0.00
7600	EXCESS REVENUE OVER EXPENSES	\$0.00	\$-1,450,799.00	\$0.00	-100%	\$0.00

Scattered Site - Beaver Gardens/Beaver Park						
REVENUE						
Account Number	Account Class	2022 Approved Revenue Budget	2022 Actual Amounts Received	2023 Approved Revenue Budget	% Change from 2022 Actual to 2023 Budget	2023 Dollars Budgeted per Unit per Month
3110	Shelter Rent - Tenants	\$315,828.00	\$432,047.00	\$322,304.00	-25.4%	\$463.08
3111	Shelter Rent - Tenants - Fraud/Retroactive	\$0.00	\$0.00	\$0.00	0%	\$0.00
3115	Shelter Rent - Federal Section 8	\$0.00	\$0.00	\$0.00	0%	\$0.00
3190	Nondwelling Rentals	\$0.00	\$0.00	\$0.00	0%	\$0.00
3400	Administrative Fee - MRVP	\$0.00	\$0.00	\$0.00	0%	\$0.00
3610	Interest on Investments - Unrestricted	\$1,320.00	\$1,347.00	\$1,336.00	-0.8%	\$1.92
3611	Interest on Investments - Restricted	\$0.00	\$0.00	\$0.00	0%	\$0.00
3690	Other Revenue	\$0.00	\$0.00	\$0.00	0%	\$0.00
3691	Other Revenue - Retained	\$0.00	\$0.00	\$0.00	0%	\$0.00
3692	Other Revenue - Operating Reserves	\$0.00	\$0.00	\$0.00	0%	\$0.00
3693	Other Revenue - Energy Net Meter	\$0.00	\$0.00	\$0.00	0%	\$0.00
3801	Operating Subsidy - DHCD (4001)	\$517,162.00	\$210,361.00	\$587,174.00	179.1%	\$843.64
3802	Operating Subsidy - MRVP Landlords	\$0.00	\$0.00	\$0.00	0%	\$0.00
3803	Restricted Grants Received	\$0.00	\$0.00	\$0.00	0%	\$0.00
3920	Gain/Loss From Sale/Disp. of Prop.	\$0.00	\$0.00	\$0.00	0%	\$0.00
3000	TOTAL REVENUE	\$834,310.00	\$643,755.00	\$910,814.00	41.5%	\$1,308.64

Scattered Site - Beaver Gardens/Beaver Park						
EXPENSES						
Account Number	Account Class	2022 Approved Expense Budget	2022 Actual Amounts Spent	2023 Approved Expense Budget	% Change from 2022 Actual to 2023 Budget	2023 Dollars Budgeted per Unit per Month
4110	Administrative Salaries	\$169,384.00	\$91,054.00	\$177,853.00	95.3%	\$255.54
4120	Compensated Absences	\$0.00	\$0.00	\$0.00	0%	\$0.00
4130	Legal	\$300.00	\$286.00	\$300.00	4.9%	\$0.43
4140	Members Compensation	\$0.00	\$0.00	\$0.00	0%	\$0.00
4150	Travel & Related Expenses	\$201.00	\$10.00	\$199.00	1890%	\$0.29
4170	Accounting Services	\$800.00	\$745.00	\$800.00	7.4%	\$1.15
4171	Audit Costs	\$700.00	\$560.00	\$630.00	12.5%	\$0.91
4180	Penalties & Interest	\$0.00	\$0.00	\$0.00	0%	\$0.00
4190	Administrative Other	\$7,043.00	\$4,273.00	\$6,738.00	57.7%	\$9.68
4191	Tenant Organization	\$0.00	\$0.00	\$0.00	0%	\$0.00
4100	TOTAL ADMINISTRATION	\$178,428.00	\$96,928.00	\$186,520.00	92.4%	\$267.99
4310	Water	\$61,499.00	\$86,934.00	\$70,494.00	-18.9%	\$101.28
4320	Electricity	\$1,585.00	\$207.00	\$344.00	66.2%	\$0.49
4330	Gas	\$741.00	\$0.00	\$146.00	100%	\$0.21
4340	Fuel	\$0.00	\$0.00	\$0.00	0%	\$0.00
4360	Net Meter Utility Debit/Energy Conservation	\$0.00	\$0.00	\$0.00	0%	\$0.00
4390	Other	\$0.00	\$0.00	\$0.00	0%	\$0.00
4391	Solar Operator Costs	\$0.00	\$0.00	\$0.00	0%	\$0.00
4392	Net Meter Utility Credit (Negative Amount)	\$0.00	\$0.00	\$0.00	0%	\$0.00
4300	TOTAL UTILITIES	\$63,825.00	\$87,141.00	\$70,984.00	-18.5%	\$101.99

Scattered Site - Beaver Gardens/Beaver Park						
EXPENSES						
Account Number	Account Class	2022 Approved Expense Budget	2022 Actual Amounts Spent	2023 Approved Expense Budget	% Change from 2022 Actual to 2023 Budget	2023 Dollars Budgeted per Unit per Month
4410	Maintenance Labor	\$0.00	\$0.00	\$0.00	0%	\$0.00
4420	Materials & Supplies	\$0.00	\$0.00	\$0.00	0%	\$0.00
4430	Contract Costs	\$320,069.00	\$312,716.00	\$366,713.00	17.3%	\$526.89
4400	TOTAL MAINTENANCE	\$320,069.00	\$312,716.00	\$366,713.00	17.3%	\$526.89
4510	Insurance	\$14,354.00	\$14,888.00	\$16,794.00	12.8%	\$24.13
4520	Payment in Lieu of Taxes	\$15,198.00	\$15,165.00	\$15,198.00	0.2%	\$21.84
4540	Employee Benefits	\$83,075.00	\$76,858.00	\$85,260.00	10.9%	\$122.50
4541	Employee Benefits - GASB 45	\$0.00	\$45,127.00	\$0.00	-100%	\$0.00
4542	Pension Expense - GASB 68	\$0.00	\$0.00	\$0.00	0%	\$0.00
4570	Collection Loss	\$0.00	\$0.00	\$0.00	0%	\$0.00
4571	Collection Loss - Fraud/Retroactive	\$0.00	\$0.00	\$0.00	0%	\$0.00
4580	Interest Expense	\$0.00	\$0.00	\$0.00	0%	\$0.00
4590	Other General Expense	\$0.00	\$0.00	\$0.00	0%	\$0.00
4500	TOTAL GENERAL EXPENSES	\$112,627.00	\$152,038.00	\$117,252.00	-22.9%	\$168.47
4610	Extraordinary Maintenance	\$38,683.00	\$15,750.00	\$47,802.00	203.5%	\$68.68
4611	Equipment Purchases - Non Capitalized	\$2,704.00	\$3,174.00	\$3,230.00	1.8%	\$4.64
4612	Restricted Reserve Expenditures	\$0.00	\$0.00	\$0.00	0%	\$0.00
4715	Housing Assistance Payments	\$0.00	\$0.00	\$0.00	0%	\$0.00
4801	Depreciation Expense	\$0.00	\$68,019.00	\$0.00	-100%	\$0.00
4600	TOTAL OTHER EXPENSES	\$41,387.00	\$86,943.00	\$51,032.00	-41.3%	\$73.32
4000	TOTAL EXPENSES	\$716,336.00	\$735,766.00	\$792,501.00	7.7%	\$1,138.65

Scattered Site - Beaver Gardens/Beaver Park						
SUMMARY						
Account Number	Account Class	2022 Approved Budget	2022 Actual Amounts	2023 Approved Budget	% Change from 2022 Actual to 2023 Budget	2023 Dollars Budgeted per Unit per Month
3000	TOTAL REVENUE	\$834,310.00	\$643,755.00	\$910,814.00	41.5%	\$1,308.64
4000	TOTAL EXPENSES	\$716,336.00	\$735,766.00	\$792,501.00	7.7%	\$1,138.65
2700	NET INCOME (DEFICIT)	\$117,974.00	\$-92,011.00	\$118,313.00	-228.6%	\$169.99
7520	Replacements of Equip. - Capitalized	\$0.00	\$0.00	\$25,000.00	100%	\$35.92
7540	Betterments & Additions - Capitalized	\$0.00	\$0.00	\$0.00	0%	\$0.00
7500	TOTAL NONOPERATING EXPENDITURES	\$0.00	\$0.00	\$25,000.00	100%	\$35.92
7600	EXCESS REVENUE OVER EXPENSES	\$117,974.00	\$-92,011.00	\$93,313.00	-201.4%	\$134.07

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 DHCD 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 – DHCD (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 DHCD during the fiscal year for housing assistance payments to landlords. At the end of each fiscal year this account will be adjusted to equal the actual subsidy earned.

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

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

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

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

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

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

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

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

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

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

4191: Tenant Organization: LTO Funding by the LHA. Upon request the LHA shall fund all LTOs in a city or town at the annual rate of \$6.00 per state-aided public housing unit occupied or available for occupancy by residents represented by such LTO(s) or an annual total of \$500.00 prorated among all such LTO(s), whichever is more. For more information on the creation and funding of LTOs see 760 CMR 6.09.

Authorities which operate computer learning centers, which are funded by the state consolidated budget or by other sources (which are typically recorded in line #3691 as "Other Revenue Retained", should budget the cost of the centers on this line.

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

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

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

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

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

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

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

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

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

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

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

4510: Insurance: Includes the total amount of premiums charged all forms of insurance. Fire and extended coverage, crime, and general liability are handled by DHCD 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 DHCD 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 DHCD 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.

PMR Narrative Responses

Narrative Responses to the Performance Management Review (PMR) Findings

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

Explanation of PMR Criteria Ratings

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

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

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

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

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

CRITERION	DESCRIPTION
	<ul style="list-style-type: none"> • 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
Requested Work Orders	<p>All requested work orders are created, tracked, reported and completed within 14 days or added to DM/CIP</p> <ul style="list-style-type: none"> • No Findings: All requested work orders under review are created, tracked, and reported; All work is complete within 14 days or added to DM/CIP • Operational Guidance: All requested work orders completed within 14 days or added to DM/CIP; And less than 100% of work orders under review are correctly created, tracked and reported <p>Corrective Action: Not all requested work orders are completed within 14 days or added to DM/CIP</p>

Policies

The following policies are currently in force at the Framingham Housing Authority:

Policy	Last Ratified by Board Vote	Notes
*Rent Collection Policy	08/09/2021	
*Personnel Policy	02/12/2018	
*Capitalization Policy	08/09/2021	
*Procurement Policy	10/12/2016	
*Grievance Policy		Grievance Procedure in place - No FHA Board vote required
Other – Define in the ‘Notes’ column	08/09/2021	Affirmatively Furthering Fair Housing
Equal Employment Opportunity Policy and Affirmative Action Plan	06/12/2017	
Other – Define in the ‘Notes’ column	11/07/1966	By Laws - Framingham Housing Authority
Other – Define in the ‘Notes’ column	03/12/2018	Code of Conduct Policy
Criminal Offender Records Information (CORI) Policy	07/10/2017	
Credit/Debit Card Policy	05/12/2014	
Other – Define in the ‘Notes’ column	08/09/2021	Disposition Policy
Other – Define in the ‘Notes’ column	05/25/1989	Drug-Free Workplace Policy
Emergency Response Plan	08/09/2021	Emergency Case Plan
Other – Define in the ‘Notes’ column	08/09/2021	Eviction Policy
Fair Housing Marketing Plan	08/09/2021	

Policy	Last Ratified by Board Vote	Notes
Other – Define in the ‘Notes’ column	08/09/2021	Family & Medical Leave Policy
Other – Define in the ‘Notes’ column	11/03/2016	Flat Rent Policy
Other – Define in the ‘Notes’ column	08/09/2021	Force Account Labor
Other – Define in the ‘Notes’ column	01/11/2016	Fraud Policy
Other – Define in the ‘Notes’ column	09/12/2016	Integrated Pest Management Policy (IPM)
Other – Define in the ‘Notes’ column	02/18/2016	Internal Controls Policy
Other – Define in the ‘Notes’ column	08/09/2021	Internet & Technology Resources Usage Policy
Investment Policy	08/09/2021	
Language Access Plan	08/09/2021	Limited English Proficiency (LEP) Policy
Maintenance and Other Charges	11/14/2011	Charges for Maintenance Repairs
Smoking Policy	09/12/2016	Non-Smoking Policy
Other – Define in the ‘Notes’ column	02/18/2016	OBRA Policy
Parking	06/14/2021	
Pet Policy	08/09/2021	
Other – Define in the ‘Notes’ column	08/09/2004	Program Participation Policy
Reasonable Accommodations Policy	07/10/2017	
Other – Define in the ‘Notes’ column	05/08/2007	Satellite Policy
Sexual Harassment Policy	03/12/2018	

Policy	Last Ratified by Board Vote	Notes
Other – Define in the ‘Notes’ column	08/09/2021	Smoke Detector Policy
Travel Policy	05/22/2011	
Other – Define in the ‘Notes’ column	01/11/2016	Vehicle Policy
Other – Define in the ‘Notes’ column	05/08/2017	Violence Against Women Act (VAWA) Policy
Other – Define in the ‘Notes’ column	08/09/2021	Workers' Compensation Policy and Procedures

* Starred policies are required by DHCD. 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 DHCD.

Waivers

Framingham Housing Authority has received the following waivers from DHCD’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 Waiver Approved by DHCD	Date Expired
Biennial recertification of c.667 rents	Due to Covid 19	03/25/2020	06/15/2021

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

Glossary

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

AHVP: Alternative Housing Voucher Program

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

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

ANUEL: Allowable Non-Utility Expense Level

AP: Annual Plan

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

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

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

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

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

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

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

CNA: Capital Needs Assessment

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

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

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

DHCD: Massachusetts Department of Housing & Community Development

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

FF: Formula Funding

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

FYE: Fiscal Year End

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

HHA: Host Housing Authority for the RCAT program.

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

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

LHA: Local Housing Authority

LTO: Local Tenants Organization

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

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

MOR: Management and Occupancy Report

MRVP: Massachusetts Rental V DHCD's annual review of each housing authority's performance. It pulls together data on the authority's occupancy rates, tenant accounts receivables, accounts payable, budget variance, operating reserve, capital improvement plan submission, capital spending, annual inspections and work order and maintenance systems to identify and address areas of strength and areas for development. Its goal is to allow DHCD and the LHA to

take a deep dive into the data, lift up best practices, and work together towards improving operations oucher Program.

Performance Management Review (PMR):

PMR: Performance Management Review

RCAT: Regional Capital Assistance Team

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

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

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

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

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

Attachments

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

Due to the COVID-19 emergency, on-site Performance Management Review (PMR) assessments by the Facilities Management Specialists were cancelled for the December fiscal year end housing authorities. Therefore, the Facility Management categories have been omitted from the PMR document.

- none
- Cover sheet for tenant satisfaction surveys
- Tenant Satisfaction Survey 667 Program
- Tenant Satisfaction Survey 200 and 705 Program

No substantial comments at the public Hearing.

Resident Surveys – Background

Since 2016 DHCD has been working with the Center for Survey Research (CSR) at the University of Massachusetts Boston to survey residents in the state public housing units it oversees. The surveys are confidential, mailed directly to residents, and returned to CSR by mail (or, starting in 2019, completed on-line). CSR surveys residents of elderly/disabled units (also known as Chapter 667) and family units (also known as Chapter 200 and Chapter 705).

During each round all units are mailed surveys, with one exception: in the case of the twelve housing authorities with more than 225 c.200 family units, a randomly selected group of 225 units was surveyed at each housing authority. This group was determined to be large enough to generate statistically useful results. In both rounds, responses from c.200 and c.705 residents are always combined.

Round One Surveys (2016 – 2018)

In Round One of the surveys, CSR surveyed residents of elderly/disabled units (c.667) in three groups in the Fall of 2016, 2017 and 2018. CSR surveyed residents of family units (c.705 and c.200) in the Spring of 2016. (Note: there are many more c.667 units, so they were broken down into three groups).

Notes on Round One Surveys

1. In previous publications of this survey data, if there were at least twenty responses from residents of an authority's c.667 units or from their c.200/705 units, then there is a separate report for that program.
2. We originally combined data from c.667 and c.200/705 units for some LHAs with limited family data. However, to be consistent with the new Round Two methodology described below, we recalculated the Round One data using the new methodology. Since we no longer combine results from the different programs several LHAs no longer have a report for their c.200/705 units given the small data set for those units.

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.

Notes on Round Two Surveys

1. We refined our reporting methodology and will issue survey results for any program (c.667 or c.200/705) meeting these requirements:
 - 8-19 completed surveys received, if the response rate is at least 40%
 - 20-29 completed surveys received, if the response rate is at least 20%
 - 30+ completed surveys received, if the response rate is at least 15%
2. Responses from the family units will not be combined with responses from elderly/disabled units as they originally were in Round One. Since the variance between the results of the elderly/disabled and family programs was sometimes significant, we determined that combining the two yielded less accurate results.

Framingham Housing Authority

Chapter 667 Housing

Fall 2019

DHCD is working with the Center for Survey Research at the University of Massachusetts Boston to survey residents in the housing units it oversees.

In the Fall of 2019, surveys were sent to 7172 housing units (Chapter 667). 3421 surveys were filled out and returned.

In the **Framingham Housing Authority**, surveys were sent to a total of **200** Framingham housing units (Chapter 667); **77** surveys were completed.

This report provides some information about how the residents from the **Framingham Housing Authority** who answered the survey responded. It compares their answers to those from residents in the entire state. After the Fall 2022 data collection, this report will be recreated to include a comparison to residents from large LHAs in Central Massachusetts.

Communication

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

	Framingham Housing Authority	Entire State
Felt they were usually or always treated with courtesy and respect when they contacted management.....	91%	87%
Knew the Executive Director held a meeting with residents.....	69%	54%

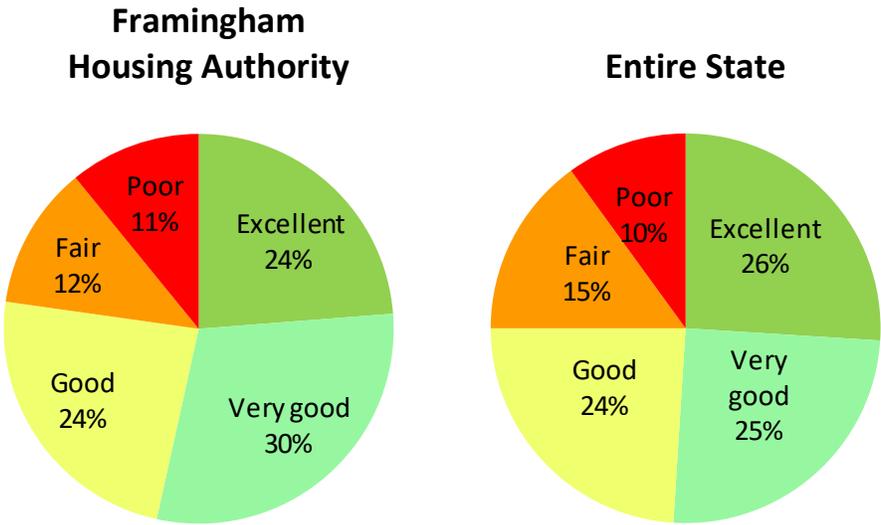
Maintenance and Repair

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

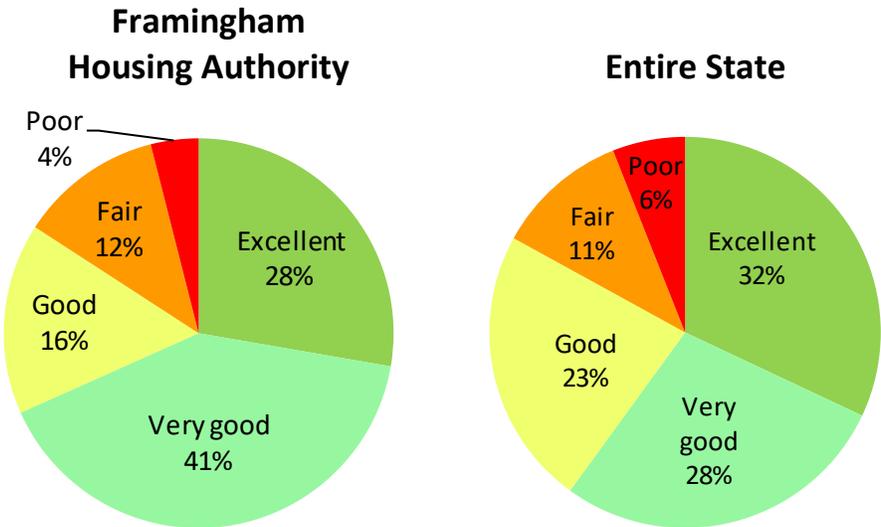
	Framingham Housing Authority	Entire State
Felt they were treated with courtesy and respect when they contacted maintenance.....	92%	89%
Were contacted by the Housing Authority before entering their apartment.....	97%	92%

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

Building maintenance:



Outdoor maintenance:



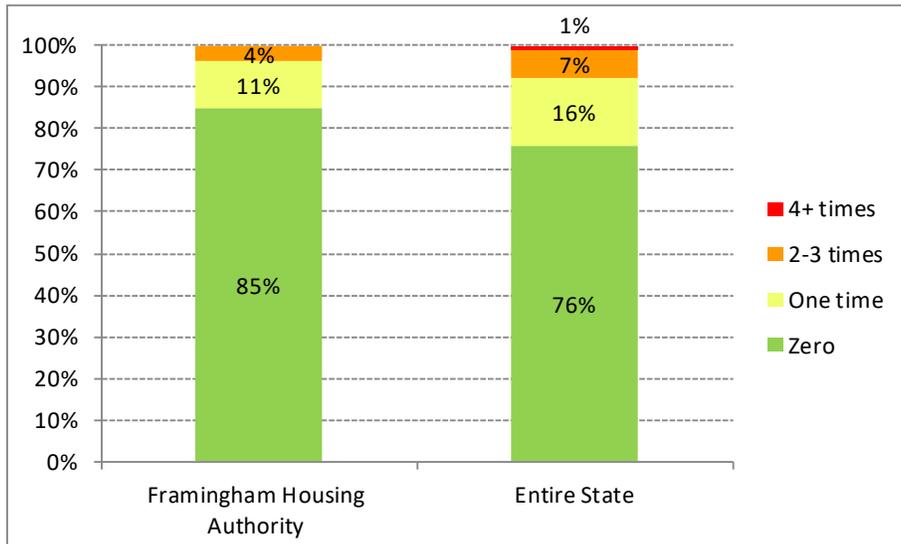
- **Heating and Water Problems:** More than a third of respondents had a problem with their heating and about a half had a plumbing problem in the last 12 months.

	Framingham Housing Authority	Entire State
Had any heating problem.....	42%	40%
Had any water problem.....	49%	57%

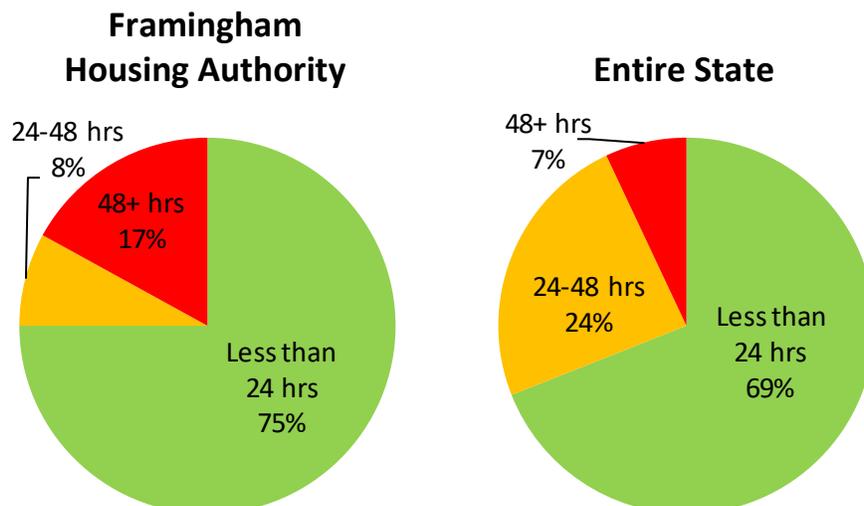
- **Heating Problems**

How many times did residents completely lose heat?

The chart below shows how many times respondents had completely lost heat in the last 12 months. The green part of the bars shows what percentage of residents did not have the problem at all. The yellow shows who had the problem one time. The orange shows those who had the problem 2-3 times. And the red shows those who had the problem 4 or more times in the last 12 months.



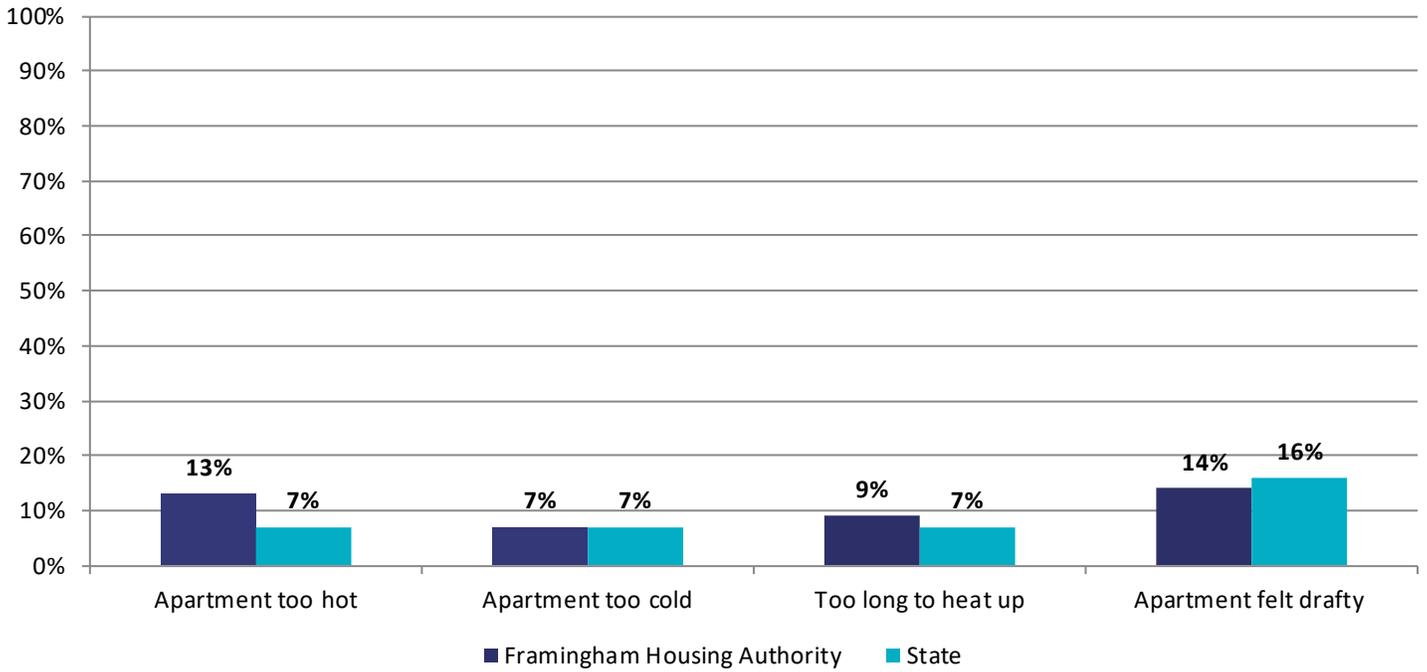
How long did it usually take for heat to come back on? For those respondents who reported completely losing heat, we asked how long it usually took for the heat to come back on – less than 24 hours, 24 - 48 hours, or more than 48 hours.



- **Other Heating Problems**

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

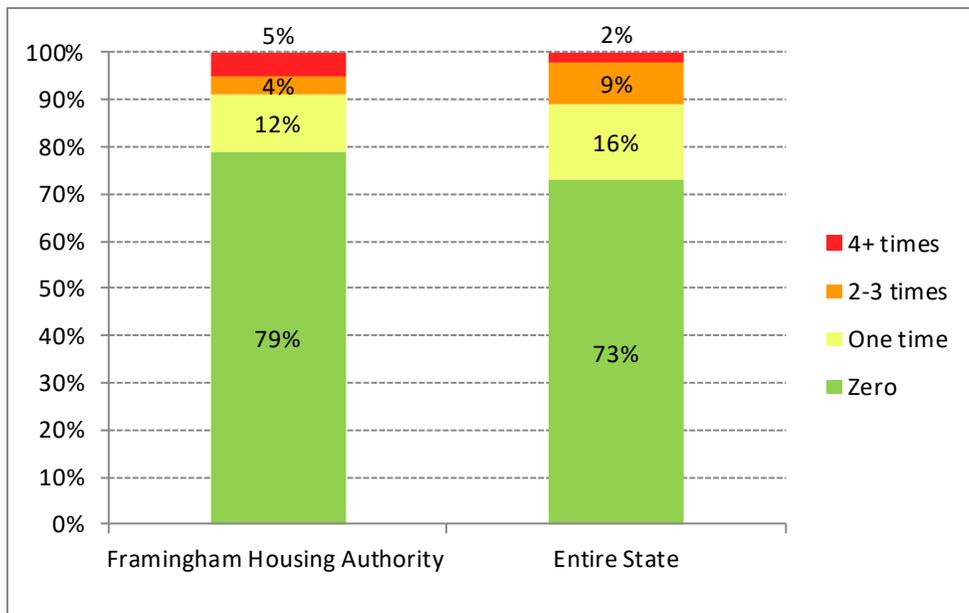
The chart below shows what percentage of residents experienced other heating problems in the last 12 months.



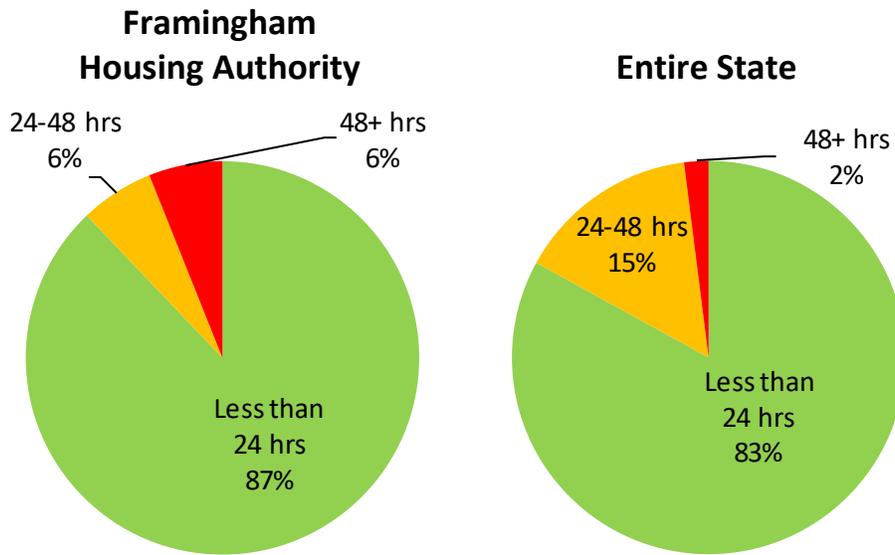
- **Water or Plumbing Problems**

How many times did residents have no hot water in their apartment?

The chart below shows how many times respondents did not have no hot water in their apartment in the last 12 months. The green part of the bars shows what percentage of residents did not have the problem at all. The yellow shows who had the problem one time. The orange shows those who had the problem 2-3 times. And the red shows those who had the problem 4 or more times in the last 12 months.



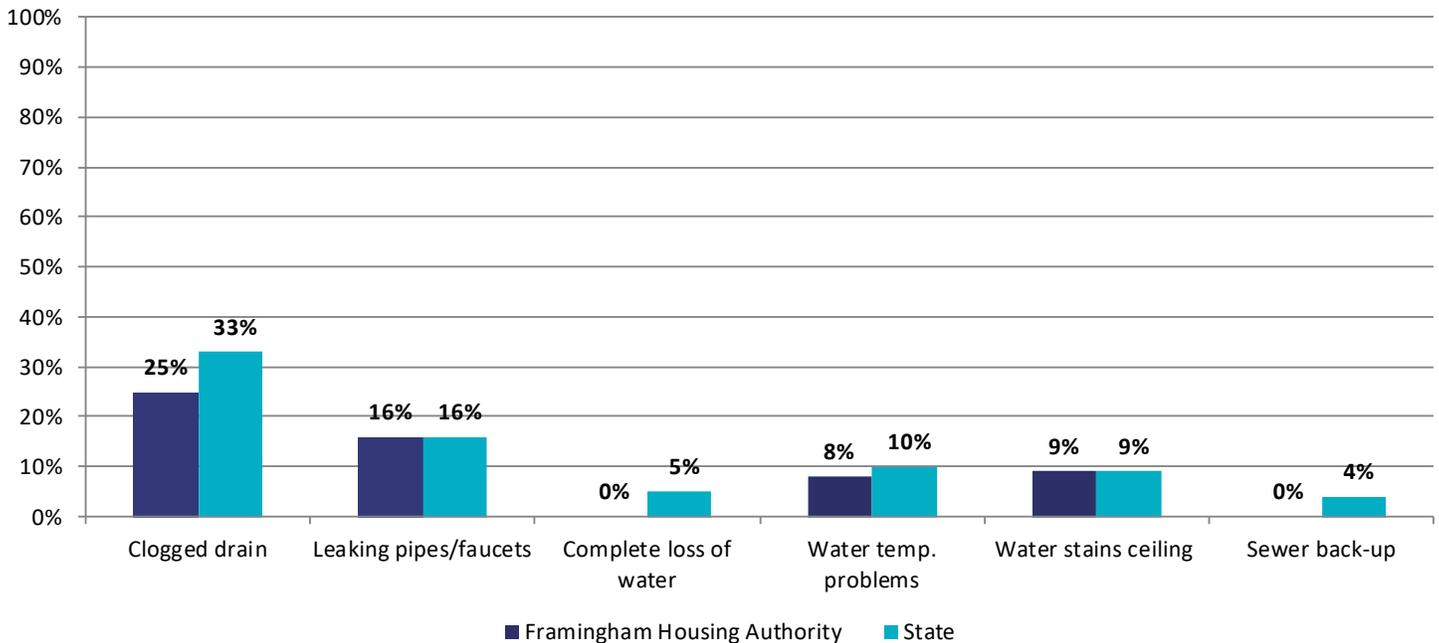
How long did it usually take for hot water to come back on? For those respondents who reported not having hot water in their apartment, we asked how long it usually took for hot water to come back on – less than 24 hours, 24 - 48 hours, or more than 48 hours.



• **Other Water or Plumbing Problems**

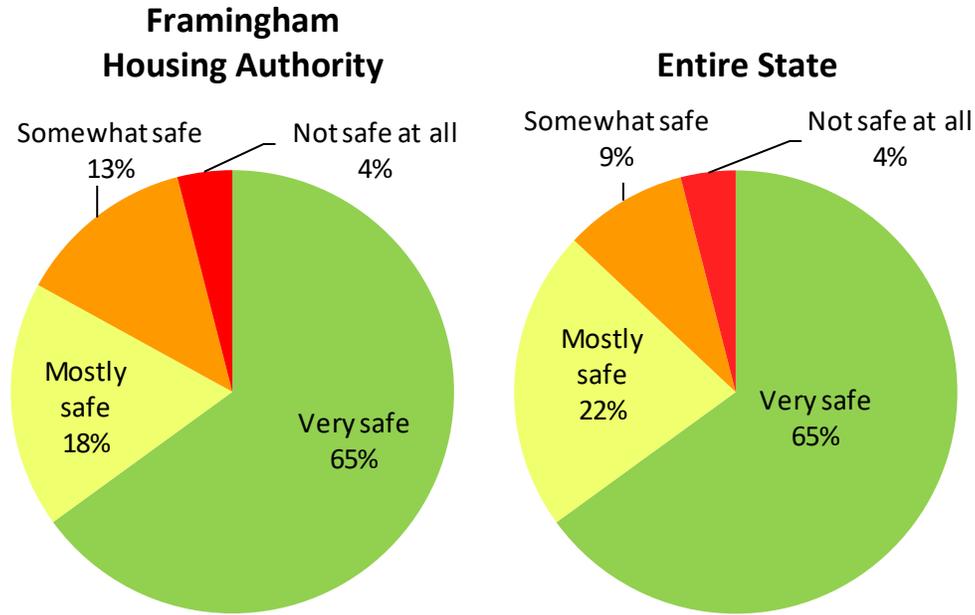
In the last 12 months did residents have other water or plumbing problems?

The chart below shows how many times respondents had other water or plumbing problems in the last 12 months.

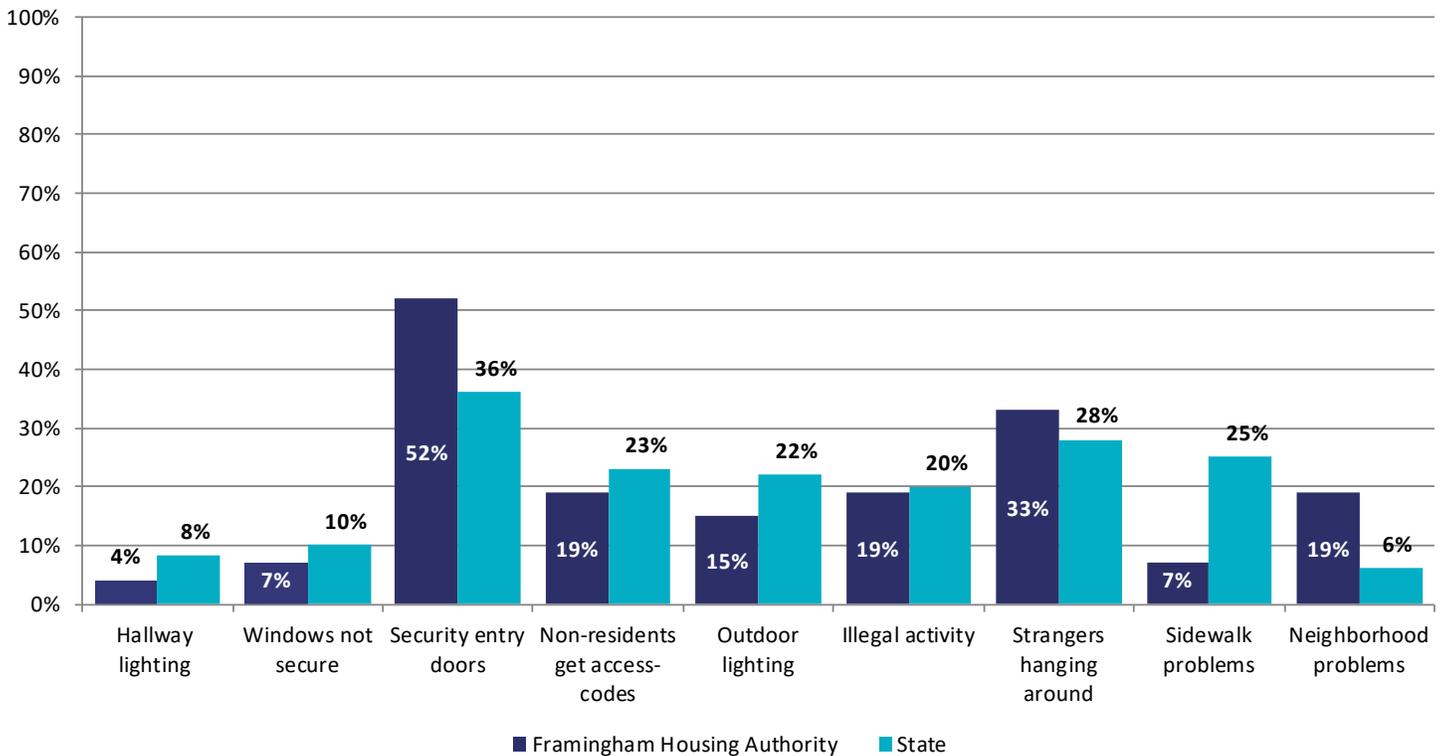


Safety

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

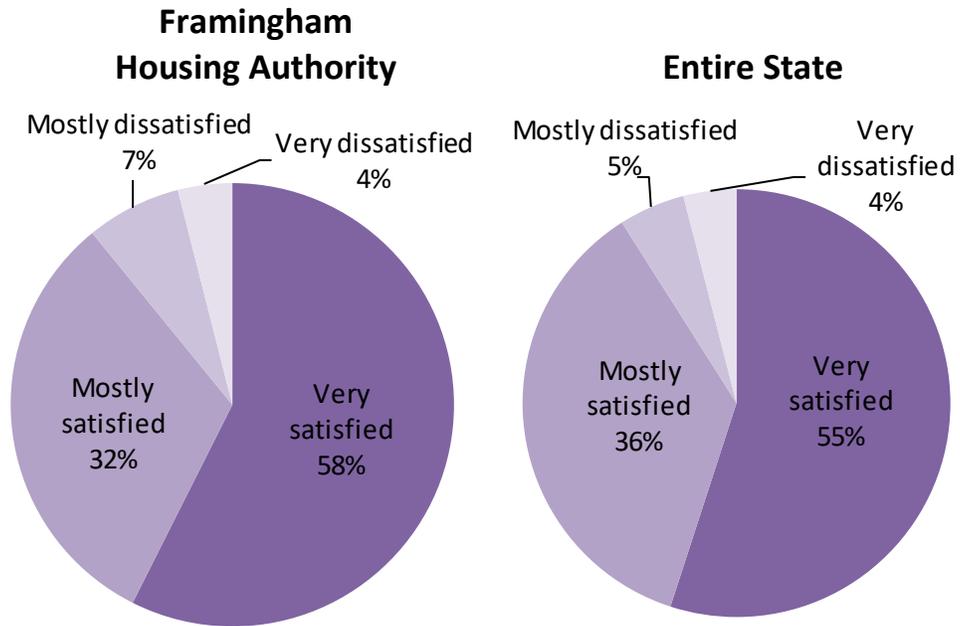


Reasons why respondents felt unsafe in their development: Respondents were asked why they felt unsafe in their development. This chart shows what specific concerns respondents mentioned.



Overall Satisfaction

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



Framingham Housing Authority
 Chapter 200 & Chapter 705 Family Housing
 Fall 2020

DHCD is working with the Center for Survey Research at the University of Massachusetts Boston to survey residents in the housing units it oversees.

In the Fall of 2020, surveys were sent to 10,163 family housing units (Chapters 200 and 705). 2,124 surveys were filled out and returned.

In the **Framingham Housing Authority**, surveys were sent to a total of **261** Framingham housing units, **69** surveys were completed.

This report provides some information about how the residents from the **Framingham Housing Authority** answered the survey. It compares their answers to those from residents in the entire state and to those from large LHAs in Central Massachusetts. These large LHAs in Central Massachusetts include: Fitchburg, Framingham, and Worcester. (Please note that survey data may not have been received from each one of these nearby LHAs.)

Communication

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

	Framingham Housing Authority	Large LHAs in Central MA*	Entire State
Felt they were usually or always treated with courtesy and respect when they contacted management.....	80%	78%	71%
Knew the Executive Director held a meeting with residents.....	15%	25%	15%

* Large LHAs in Central MA include: Fitchburg, Framingham, Worcester. (Please note that survey data may not have been received from each one of these nearby LHAs.)

Maintenance and Repair

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

	Framingham Housing Authority	Large LHAs in Central MA	Entire State
Felt they were usually or always treated with courtesy and respect when they contacted maintenance.....	84%	79%	75%
Were contacted by the Housing Authority before staff entered their apartment.....	87%	87%	86%

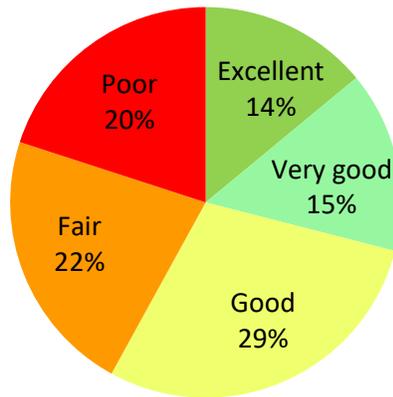
- Overall maintenance:** Respondents were asked how they would rate overall building maintenance (such as clean halls and stairways and having lights and elevators that work) and outdoor space maintenance (such as litter removal and clear walkways) in the last 12 months.

Building maintenance:

Framingham Housing Authority



Large LHAs in Central MA

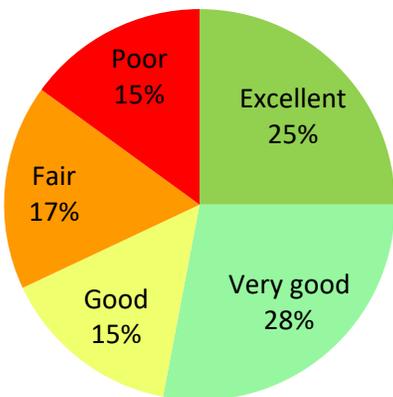


Entire State

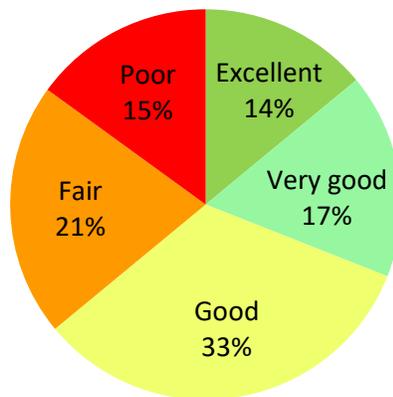


Outdoor maintenance:

Framingham Housing Authority



Large LHAs in Central MA



Entire State



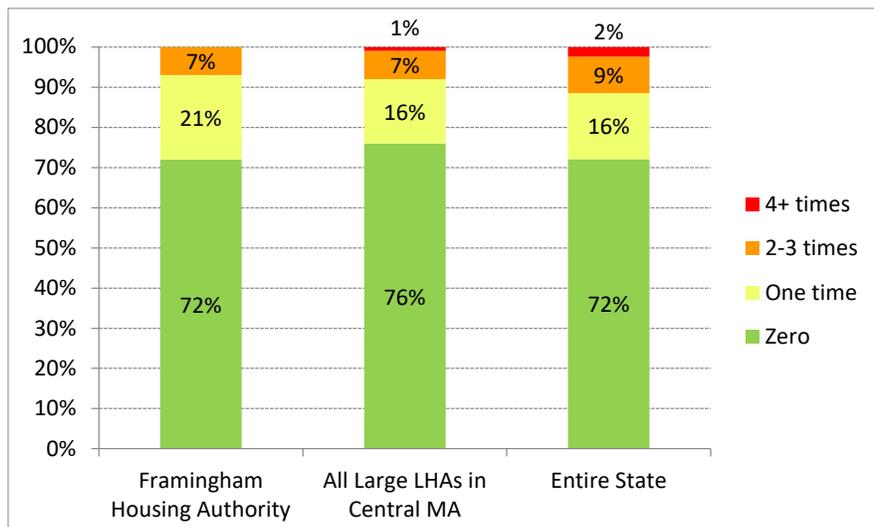
- **Heating and Water Problems:** About one-half of respondents had a problem with their heating and about three-quarters had a plumbing problem in the last 12 months.

	Framingham Housing Authority	Large LHAs in Central MA	Entire State
Had any heating problem.....	52%	52%	56%
Had any water problem.....	74%	69%	74%

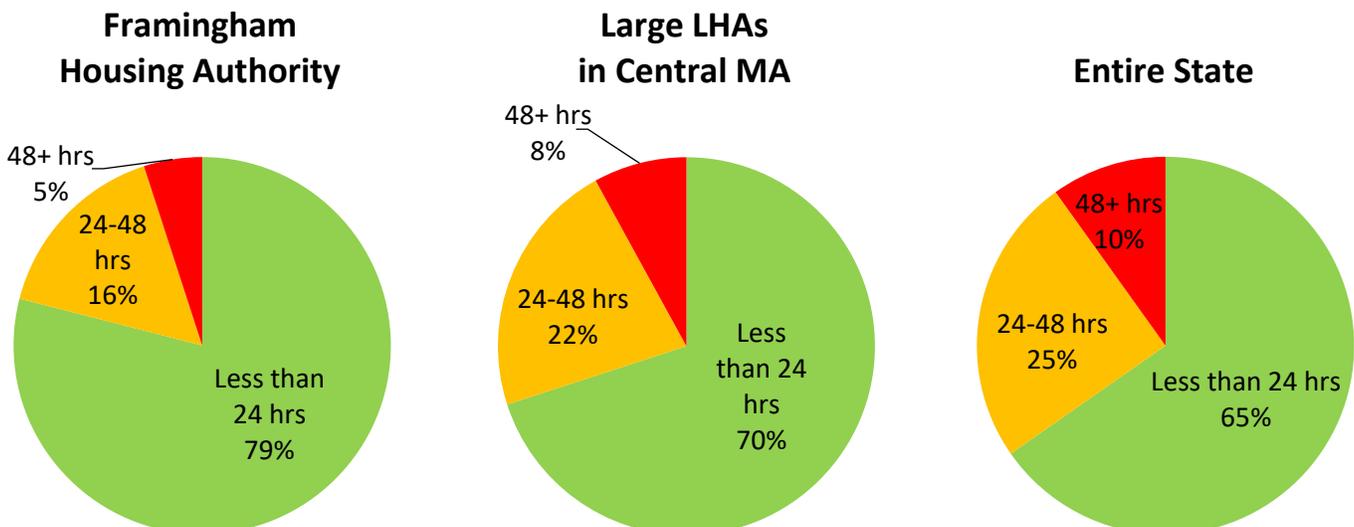
- **Heating Problems**

How many times did residents completely lose heat?

The chart below shows how many times respondents had completely lost heat in the last 12 months. The green part of the bars shows what percentage of residents never completely lost heat. The yellow shows who lost heat one time. The orange shows those who lost heat 2-3 times. And the red shows those who lost heat 4 or more times in the last 12 months.



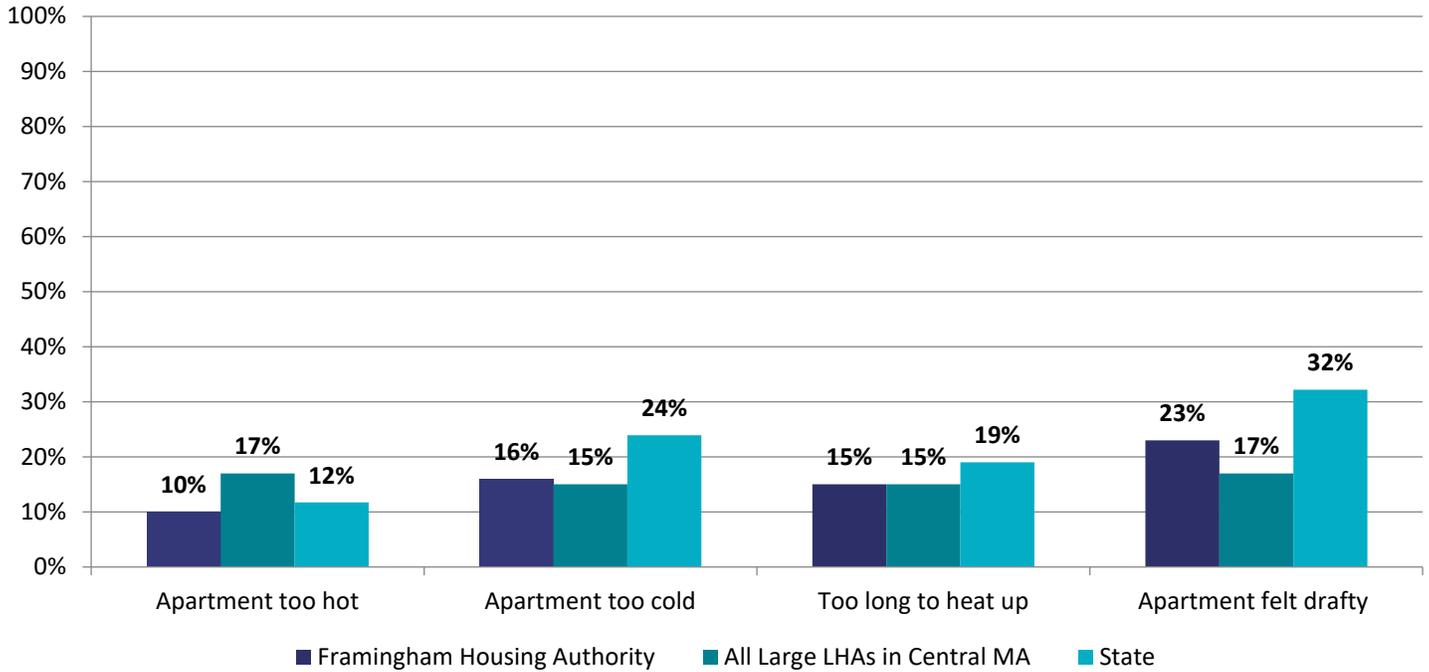
How long did it usually take for heat to come back on? For those respondents who reported completely losing heat, we asked how long it usually took for the heat to come back on – less than 24 hours, 24 - 48 hours, or more than 48 hours.



- **Other Heating Problems**

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

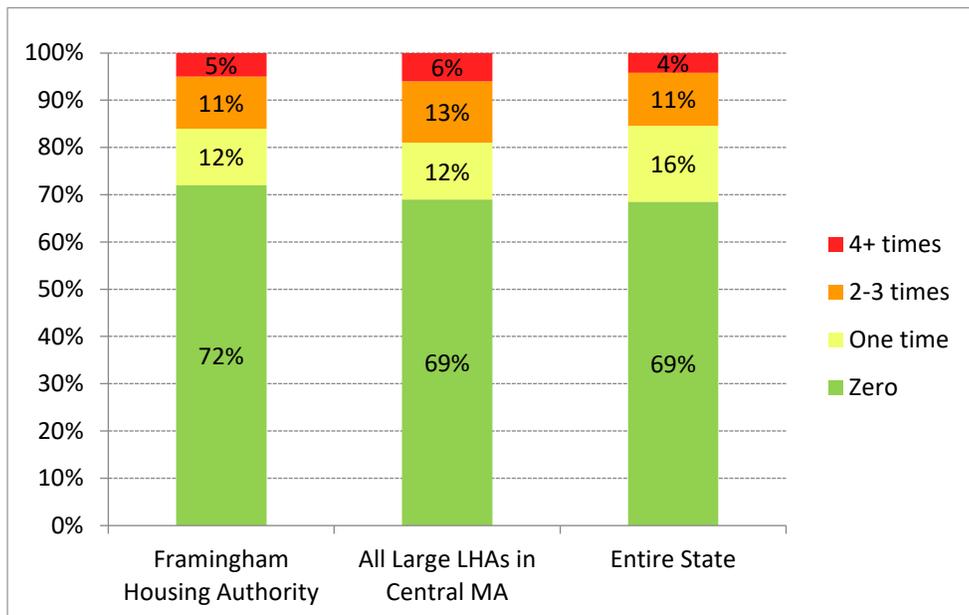
The chart below shows what percentage of residents experienced other heating problems in the last 12 months.



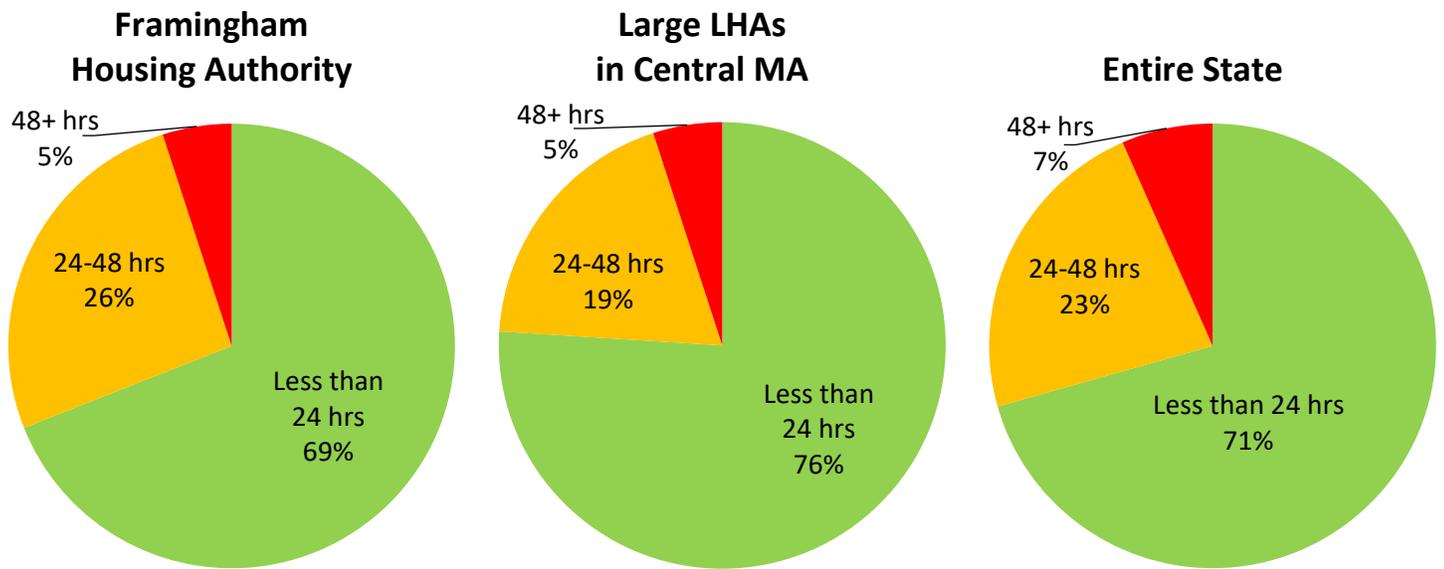
- **Water or Plumbing Problems**

How many times did residents have no hot water in their apartment?

The chart below shows how many times respondents did not have hot water in their apartment in the last 12 months. The green part of the bars shows what percentage of residents never had this problem. The yellow shows who lost hot water one time. The orange shows those who lost hot water 2-3 times. And the red shows those who lost hot water 4 or more times in the last 12 months.



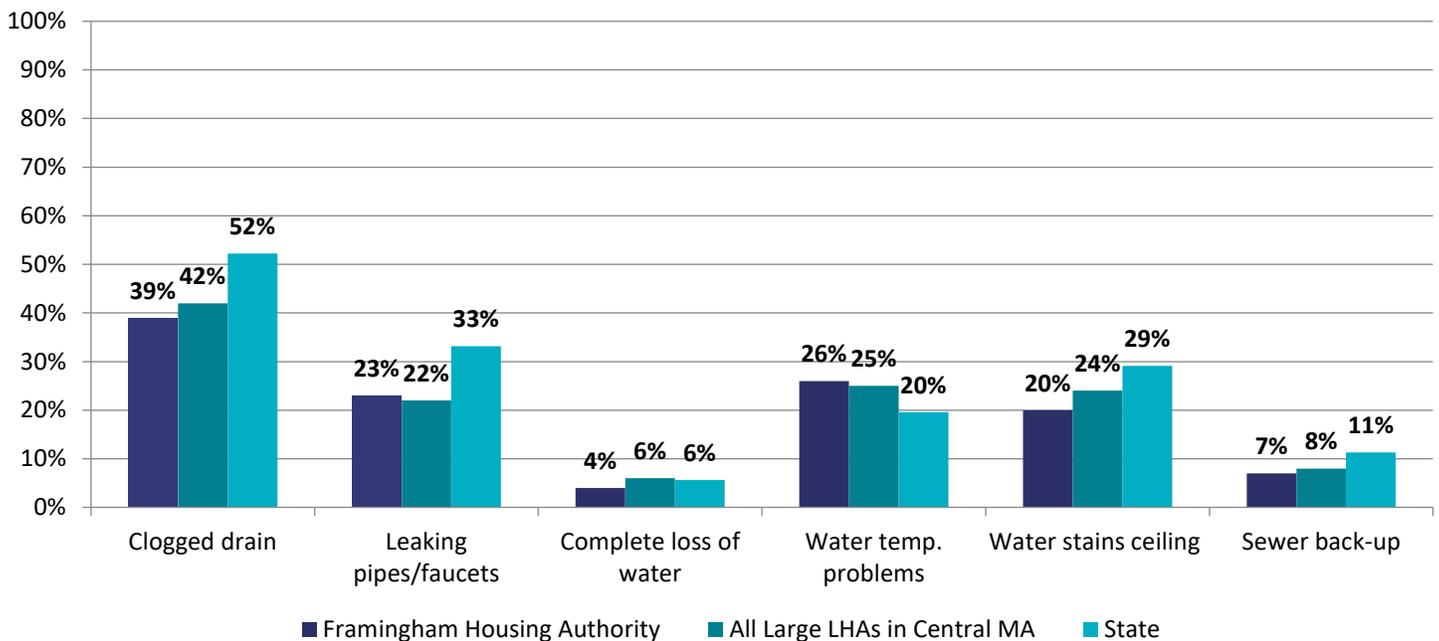
How long did it usually take for hot water to come back on? For those respondents who reported not having hot water in their apartment, we asked how long it usually took for hot water to come back on – less than 24 hours, 24 - 48 hours, or more than 48 hours.



• **Other Water or Plumbing Problems**

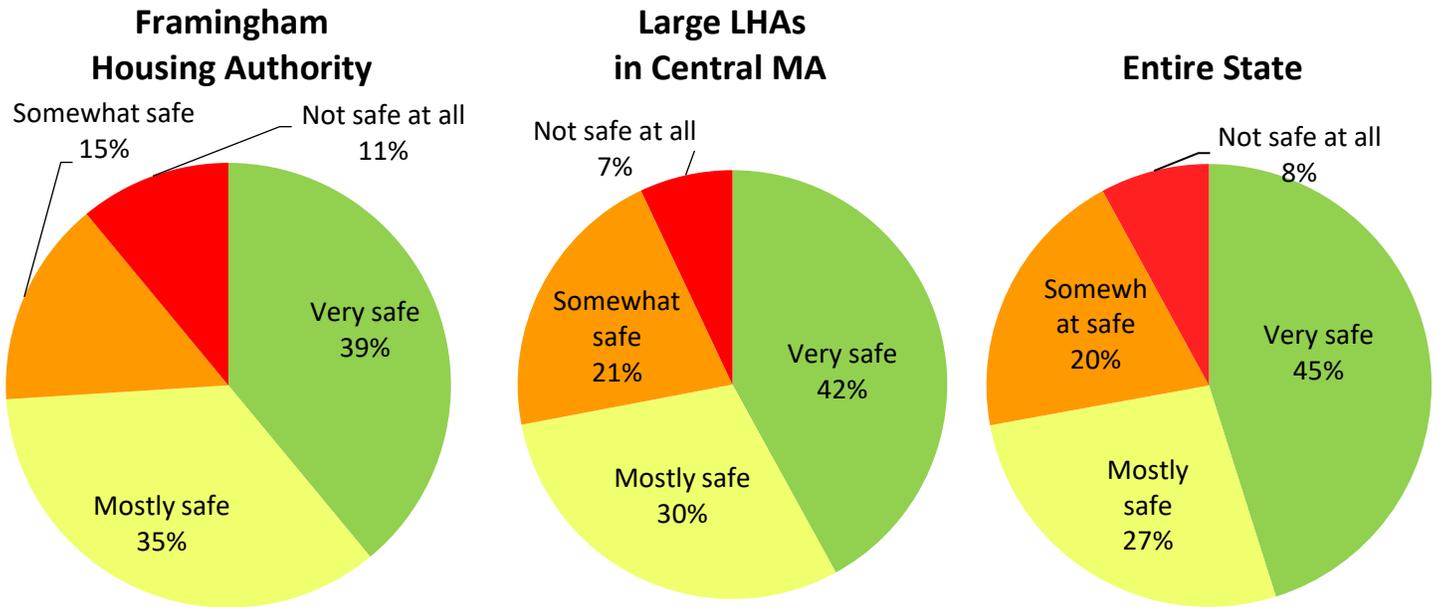
In the last 12 months did residents have other water or plumbing problems?

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

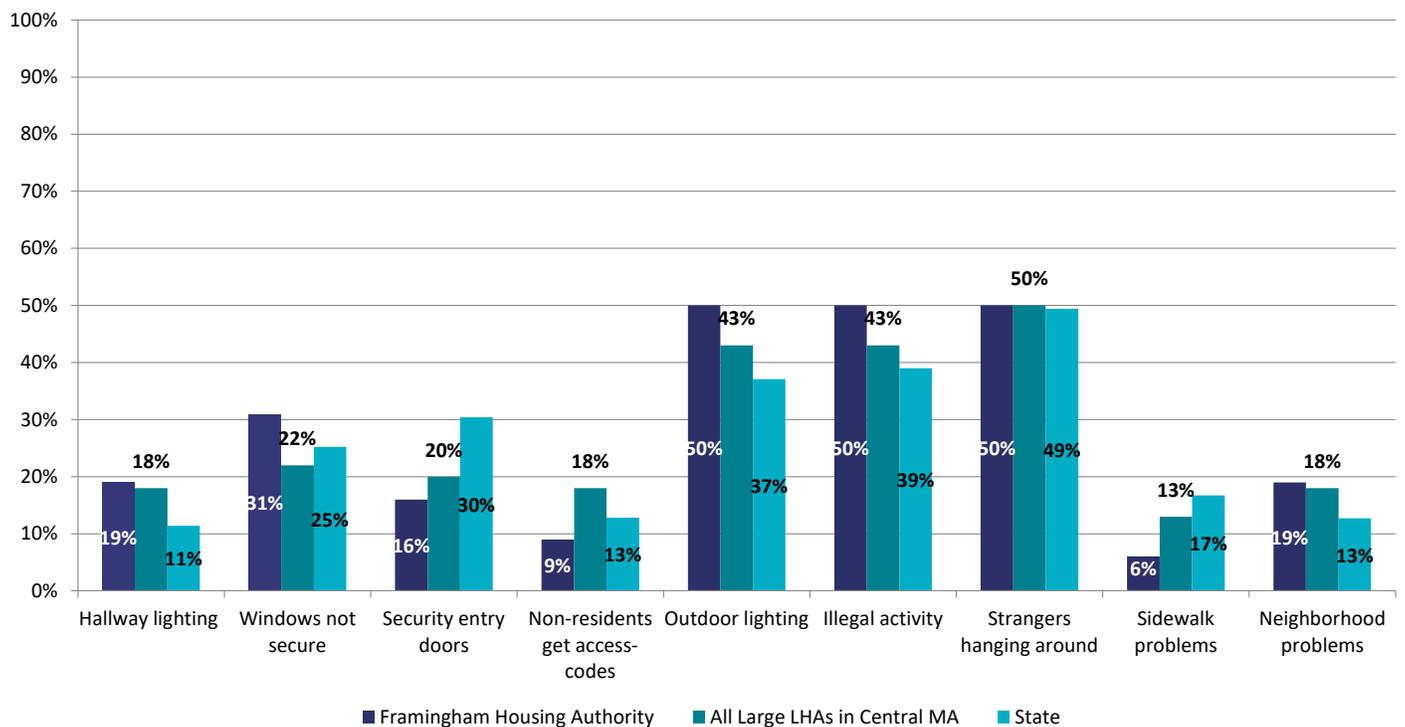


Safety

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



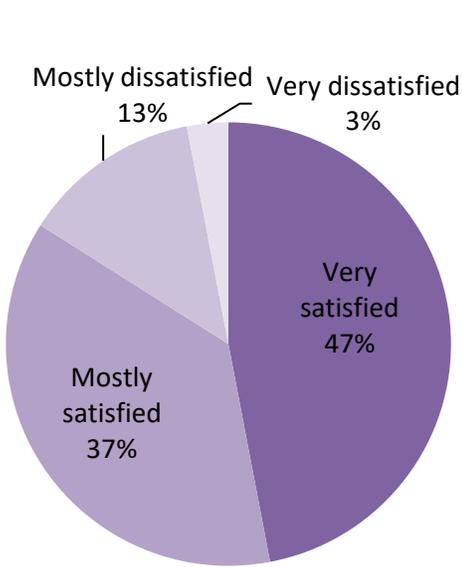
Reasons why respondents felt unsafe in their development: Respondents were asked why they felt unsafe in their development. This chart shows what specific concerns respondents mentioned.



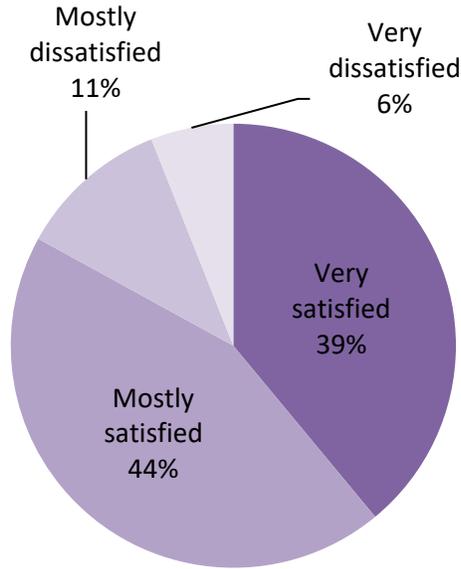
Overall Satisfaction

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

**Framingham
Housing Authority**



**Large LHAs
in Central MA**



Entire State

