

**Overview and Certification**

# Gloucester 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\(4\)\(a\)\(4\)](#).

**Overview and Certification**

The Gloucester 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. McPherson Local Tenants Organization (LTO) Letter
  - b. Lincoln Park Local Tenants Organization (LTO) Letter
  - c. Public Comments and LHA Responses
  - d. Cover sheet for tenant satisfaction surveys
  - e. Tenant Satisfaction Survey 667 Program
  - f. Performance Management Review

**Overview and Certification****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.

<b>Dev No</b>	<b>Type</b>	<b>Development Name</b>	<b>Num Bldgs</b>	<b>Year Built</b>	<b>Dwelling Units</b>
667-06	Elderly	CURTIS B. CLARK 667-06	1	1983	56
667-01	Elderly	LINCOLN PARK 667-01	13	1959	52
667-04	Elderly	MCPHERSON PARK 667-04	1	1975	97
667-02	Elderly	POPLAR PARK 667-02	14	1964	76
200-01	Family	RIVERDALE PARK 200-01	66	1949	160
667-05	Elderly	SHEEDY BUILDING 667-05	1	1981	81
	Other	Special Occupancy units	1		8
<b>Total</b>			<b>97</b>		<b>530</b>

**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.

Gloucester Housing Authority manages 42 MRVP vouchers.

**Federally Assisted Developments**

Gloucester Housing Authority also manages Federally-assisted public housing developments and/or federal rental subsidy vouchers serving 774 households.

**Overview and Certification**

Additional Remarks on LHA Data

The GHA also operates the DMH Rental Assistance Program. Family Self-sufficiency Program, A Better Life Program, Housing First Program, Senior Supportive Housing Program and Homeownership Education Programs

LHA Central Office

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 David Houlden, Executive Director  
 Phone: 978-283-1234  
 Email: dhoulden@ghama.com

LHA Board of Commissioners

	<u>Role</u>	<u>Category</u>	<u>From</u>	<u>To</u>
Scott Duffany	Chair	Labor Appointee	05/29/2020	05/28/2025
Irene Frontiero	Member		07/28/2019	05/28/2024
Jennifer-Lee Levitz Aronson	Treasurer	State Appointee	01/31/2022	06/05/2026
Andrew Nickas	Vice-Chair		05/29/2022	05/28/2027
Barbara Snare	Member	State Tenant Rep	02/15/2017	02/14/2023

Local Tenant Organizations

	<u>Date of Recognition by LHA</u>	<u>Date LHA Reviewed Draft AP with LTO</u>
McPherson Park Tenant Association	07/13/2022	02/14/2023
Lincoln Park Tenant Association	12/14/2022	02/16/2023

**Overview and Certification**

Plan History

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

	REQUIREMENT	DATE COMPLETED
A.	Advertise the public hearing on the LHA website.	01/17/2023
B.	Advertise the public hearing in public postings.	01/17/2023
C.	Notify all LTO's and RAB, if there is one, of the hearing and provide access to the Proposed Annual Plan.	01/17/2023
D.	Post draft AP for tenant and public viewing.	01/17/2023
E.	Hold quarterly meeting with LTO or RAB to review the draft AP. (Must occur before the LHA Board reviews the Annual Plan.)	02/16/2023
F.	Annual Plan Hearing. Hosted by the LHA Board, with a quorum of members present. (For Boston, the Administrator will host the hearing.)	03/08/2023
G.	Executive Director presents the Annual Plan to the Board.	03/08/2023
H.	Board votes to approve the AP. (For Boston Housing Authority, the Administrator approves and submits the AP.)	03/08/2023

## Certification

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

I, David S. Houlden, Executive Director of the Gloucester Housing Authority, certify on behalf of the Housing Authority that I have conducted an annual review of all Gloucester 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 Gloucester 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, David Houlden, Executive Director of the Gloucester 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: 03/09/2023

The Department of Housing and Community Development (DHCD) completed its review of this Annual Plan (AP) on October 27, 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 Gloucester Housing Authority**

Our CIP includes the complete modernization of our 667-4 Elderly development, McPherson Park. At the end of this project, the 45-year-old development will allow residents to thrive in place with dignity. The CIP also addresses code issues related to electrical panels, fire alarm systems and natural gas piping in addition to such health & safety issues as paving, heating distribution lines and window replacement and heating system improvements to address energy efficiency. There is also a major climate resiliency project funded for Riverdale Park.

**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)	\$3,610,314.68		Total of all FF awards minus prior FF spending
LHA Emergency Reserve	\$541,547.20		Amount to reserve for emergencies
Net FF Funds (First 3 Years of the CIP)	\$3,068,767.48	\$3,533,099.64	Funds to plan & amount actually planned in the first 3 years of the CIP
ADA Set-aside	\$18,551.98	\$19,000.00	Accessibility projects
DMH Set-aside	\$19,719.66	\$20,000.00	Dept. of Mental Health facility
DDS Set-aside	\$0.00	\$0.00	Dept. of Developmental Services facility
Unrestricted Formula Funding (FF)	\$3,030,495.84	\$3,494,099.64	Funds awarded by DHCD to be used on projects selected by the LHA and approved by DHCD.
Special DHCD Funding	\$2,935,432.07	\$1,700,432.07	Targeted awards from DHCD
Community Development Block Grant (CDBG) Funds	\$0.00	\$0.00	Federal funds awarded by a city or town for specific projects.
Community Preservation Act (CPA) Funds	\$0.00	\$0.00	Community Preservation Act funds awarded by a city or town for specific projects.
Operating Reserve(OR) Funds	\$0.00	\$0.00	Funds from the LHA's operating budget.
Other Funds	\$1,422,973.68	\$1,422,973.68	Funds other than those in the above categories. See explanation below.
<b>Total funds and planned spending</b>	<b>\$7,427,173.22</b>	<b>\$6,656,505.39</b>	<b>Total of all anticipated funding available for planned projects and the total of planned spending.</b>

**Additional notes about funding:**

Inflationary factors are slowing the number of projects that can be scheduled for FY 2023 despite additional ARPA funding.

**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
107105	ModPHASE Ph 2: SUST: Kitchen, Partial Bath, MEP	MCPHERSON PARK 667-04	\$10,299,890	\$5,107,929	\$222,420	\$437,905	\$0	\$0	\$0	\$0
107113	ARPA FF+FF: Walkway Paving	LINCOLN PARK 667-01	\$629,560	\$37,300	\$16,017	\$192,199	\$0	\$0	\$0	\$0
107115	FF: McPherson Fire Pump Controller	MCPHERSON PARK 667-04	\$51,300	\$51,300	\$0	\$0	\$0	\$0	\$0	\$0
107117	FF: Clark Window Replacment	CURTIS B. CLARK 667-06	\$674,342	\$586,829	\$0	\$0	\$0	\$0	\$0	\$0
107122	Parking & Walkway repair (Phase 1)	RIVERDALE PARK 200-01	\$586,241	\$0	\$0	\$12,458	\$544,149	\$29,636	\$0	\$0
107127	SUST-R Resiliency: mechanical systems & electrical 200-1	RIVERDALE PARK 200-01	\$965,900	\$0	\$75,335	\$890,565	\$0	\$0	\$0	\$0
107129	Parking & Walkway Repair (Phase 2)	RIVERDALE PARK 200-01	\$528,314	\$0	\$0	\$0	\$153,615	\$374,700	\$0	\$0
107132	McPherson Fire Alarm Panel	MCPHERSON PARK 667-04	\$70,508	\$7,385	\$61,650	\$2,706	\$0	\$0	\$0	\$0
107133	ARPA Targeted Award- Fed Pac and Fire Alarm System Upgrades	667-05, 667-06, 689-01	\$799,343	\$0	\$0	\$0	\$0	\$0	\$0	\$0
107134	ARPA FF+FF: Poplar Heating Distribution Line Replacement	POPLAR PARK 667-02	\$153,217	\$0	\$10,430	\$76,021	\$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
107135	Clark Window Replacement - Armory Section	CURTIS B. CLARK 667-06	\$161,115	\$0	\$4,939	\$30,049	\$0	\$0	\$0	\$0
107136	Hillcrest Porch & Exterior Trim Replacement	HILLCREST 689-01	\$100,773	\$0	\$14,340	\$86,434	\$0	\$0	\$0	\$0
107138	ARPA FF: McPherson Masonry Repairs	MCPHERSON PARK 667-04	\$37,812	\$0	\$0	\$0	\$0	\$0	\$0	\$0
107139	Master Meter Upgrade	667-01, 667-02	\$1,218,047	\$0	\$212,133	\$1,005,915	\$0	\$0	\$0	\$0
•	Riverdale Window Replacement -Phase 1	RIVERDALE PARK 200-01	\$739,855	\$0	\$0	\$76,861	\$662,995	\$0	\$0	\$0
•	Riverdale Window Replacement - Phase 2	RIVERDALE PARK 200-01	\$916,074	\$0	\$0	\$0	\$0	\$95,116	\$820,959	\$0
•	Riverdale Window Replacment - Phase 3	RIVERDALE PARK 200-01	\$678,160	\$0	\$0	\$0	\$0	\$0	\$29,967	\$215,366
•	Riverdale Furnace Replacement - Upper Veterans Way/Washington	RIVERDALE PARK 200-01	\$635,250	\$0	\$21,998	\$128,259	\$484,994	\$0	\$0	\$0
•	Lincoln Water/Sewer Line Replacment	LINCOLN PARK 667-01	\$484,979	\$0	\$0	\$231,269	\$253,711	\$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
•	Lincoln Heating Distribution Line Replacement	LINCOLN PARK 667-01	\$97,937	\$0	\$0	\$97,937	\$0	\$0	\$0	\$0

Capital Improvement Plan (CIP)

FUNDS IN ADDITION TO ANNUAL FORMULA FUNDING AWARD

Cap Hub Project Number	Project Name	DHCD Special Award Comment	Special DHCD Awards				Other Funding			
			Emergency Reserve	Compliance Reserve	Sustainability	Special Awards	CDBG	CPA	Operating Reserve	Other Funds
107105	ModPHASE Ph 2: SUST: Kitchen, Partial Bath, MEP	IAQ	\$0	\$0	\$158,000	\$5,684,740	\$0	\$0	\$0	\$4,457,150
107113	ARPA FF+FF: Walkway Paving	ARPA Formula Funding	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$400,000
107127	SUST-R Resiliency: mechanical systems & electrical 200-1	SUST-R Flood-proofing, Flood Barriers, Emergency Plan, Backwater Valves, and Tree Trimming	\$0	\$0	\$965,900	\$0	\$0	\$0	\$0	\$0
107133	ARPA Targeted Award- Fed Pac and Fire Alarm System Upgrades	ARPA Formula Funding	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$799,343
107134	ARPA FF+FF: Poplar Heating Distribution Line Replacement	ARPA Formula Funding	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$59,751
107135	Clark Window Replacement - Armory Section	ARPA Formula Funding	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$126,128
107138	ARPA FF: McPherson Masonry Repairs	ARPA Formula Funding	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$37,812

## **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.

Gloucester 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.

Year 3 is set to zero for CAP Share. Our large projects will exceed that amount.

#### **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.

Gloucester Housing Authority has requested \$1,218,046.90 in DHCD Compliance Reserve funding for project #107-667-01-0-22-1731\ 107-667-02-0-22-1732, Master Meter Upgrade. Reason: Ben Stone said this would be paid from CR

#### **3. Overall goals of the Housing Authority's CIP**

The Gloucester HA's overall goal is to maintain full occupancy and ensure the preservation of our portfolio. GHA is concentrating on capital projects that stabilize the building envelopes and systems and address site safety issues.

**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:

We had to remove four projects from our previous CIP to accommodate Riverdale Furnace Replacement project.

1. Poplar Water/Sewer Line Replacement at POPLAR PARK 667-02
2. VAT flooring replacement at LINCOLN PARK 667-01
3. Kitchen remodel at LINCOLN PARK 667-01
4. Poplar Window replacement at POPLAR PARK 667-02

**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 10/31/2022.

**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 01/11/2023.

**8. Project priorities**

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

**9. High priority deficiencies**

We have not been able to include all of our high priority (CPS priority 1 and 2) projects in our CIP:

See attached.

**10. Accessibility**

We have identified the following accessibility deficiencies in our portfolio:

We have projects to address walkway improvements at Lincoln Park, Poplar Park, Sheedy Building, and Riverdale.

We have incorporated the following projects in our CIP to address accessibility deficiencies:

We have projects to address walkway improvements at Lincoln Park, Poplar Park, Sheedy Building, and Riverdale.

**11. Special needs development**

Gloucester 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 12/06/2022.

**12. Energy and water consumption**

Our 12 most recent monthly energy reports are for months 10/2021 to 9/2022.

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.

	<b>Electric PUM &gt; Threshold</b>	<b>Gas PUM &gt; Threshold</b>	<b>Oil PUM &gt; Threshold</b>	<b>Water PUM &gt; Threshold</b>
Threshold PUM:	\$100	\$80	\$50	\$60

No developments exceed threshold values.

**13. Energy or water saving initiatives**

Gloucester 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.)

11% c. 667 (DHCD Goal 2%)

6% c. 200 (DHCD Goal 2%)

0% c. 705 (DHCD Goal 2%)

Gloucester Housing Authority will address the excess vacancies in the following manner:

The 667 higher vacancy rate is due to off-line units that are off-line due to Project 107105 ModPhase construction. We anticipate filling those units by 6/30/2023.

The 200 higher vacancy rate is due to the challenges with the CHAMP system.

# CIP Approval For Gloucester Housing Authority for FY 2024

## Formula Funding Capital Improvement Plan (CIP), WorkPlan 5001

10/27/2023

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

There are no projects to be managed independently by the LHA.

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
107-200-01-0-13-1149	107140	Riverdale Window Replacement -Phase 1	\$739,855.00	\$0.00	Searly	11/29/2023
107-200-01-0-22-1195	107141	Riverdale Furnace Replacement - Upper Veterans Way/Washington	\$635,250.00	\$0.00	FBOSSI	11/29/2023
107-667-01-0-21-976	107142	Lincoln Heating Distribution Line Replacement	\$97,937.00	\$0.00	FBOSSI	11/15/2023

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 Horacio Valdez at (617) 573-1100 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 10/27/2023 by Horacio Valdez, 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.

<b>METHOD</b>	<b>CONTACT INFO.</b>	<b>TIMES</b>
Call Answering Service	617-629-1381	After business hours.
Call LHA at Phone Number	978-283-4770	M-Th 8AM - 4:15PM, F 8AM-12PM

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 Gloucester Housing Authority main office.

<b>QUALIFYING EMERGENCY WORK REQUESTS</b>
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
Refrigerator failure in 667 unit
Unsecured apartment or common area
Biohazard in common area

**Normal Maintenance Request Process**

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

METHOD	CONTACT INFO.	TIMES
Text Phone Number		
Call Answering Service	617-629-1381	After business hours.
Call Housing Authority Office	978-283-4770	M-Th 8AM-4:15PM, F 8AM-12PM
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"/>

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

We use PHA Web for work orders, all types.

**Maintenance Plan Narrative**

Following are Gloucester 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?

The Operations Department of the GHA is responsible for managing all maintenance functions of the agency in the most cost-effective manner while maximizing the useful life of GHA properties and providing the best service to GHA residents. The GHA's PMR & AUP had no findings or comments related to our maintenance activities and we receive ongoing compliments from residents concerning the quality of work and courtesy of our staff. Management continually reviews department productivity through benchmark reports.

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

Operations Director and Maintenance Supervisor are now directly monitoring all work-order status and have shifted staffing assignments resulting in reducing the average number of days to complete work orders. The new approach has also resulted in a reduction in deferred work orders to single digits, most of which are related to supply chain issues. The reduction in work order completion time and deferred work orders were major goals for FY 2023.

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

Major goals for FY 2024 include continued reduction in work order completion time, improved unit turnover quality control and re-occupancy of the 30 vacant McPherson Park units upon completion of the ModPhase Project. The GHA also plans to expand its Preventative Maintenance Program, strengthen systems inspections and revise emergency preparedness plan.

D. Maintenance Budget Summary

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

	Total Regular Maintenance Budget	Extraordinary Maintenance Budget
Last Fiscal Year Budget	\$1,174,465.00	\$60,646.00
Last Fiscal Year Actual Spending	\$1,074,603.00	\$33,285.00
Current Fiscal Year Budget	\$1,282,017.00	\$76,850.00

E. Unit Turnover Summary

# Turnovers Last Fiscal Year	58
Average time from date vacated to make Unit "Maintenance Ready"	26 days
Average time from date vacated to lease up of unit	99 days

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

The GHA continues to be proud of its Maintenance Staff's efforts. Our staff persevered against overwhelming odds during the last year due to the sudden loss of two employees. Their commitment to preserve decent, sage and sanitary housing to our residents and are a credit to their profession.

### **Attachments**

These items have been prepared by the Gloucester 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.

## GHA Preventative Routine HA Requested Maintenance

9/12/2022

Item	Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec	Responsible Party
Turn on Outside Water Spikots-Lincoln , Poplar, Arthur St					▲								Working Supervisor
Turn off Outside Water Spikots-Lincoln , Poplar, Arthur St										▲			Working Supervisor
Call Pitney Bowes to Service/Clean Mailing Machine					▲						▲		Operations Director
Schedule Fire Alarm/Sprinkler Testing at all Highrises with Hayden					▲								Operations Director
Bleed Hot Water System - Sheedy	▲				▲			▲			▲		Staff Plumber
Bleed Hot Water System - McPherson	▲				▲			▲			▲		Staff Plumber
Inspect/replace bad bulbs all common area lighting -Clark	▲						▲						Working Supervisor
Inspect/replace bad bulbs all common area lighting - Sheedy	▲						▲						Working Supervisor
Inspect/replace bad bulbs all common lighting - McPherson	▲						▲						Working Supervisor
Set Exterior lights Timers at Poplar, Lincoln and Willowood on at 8:00 pm			▲										Working Supervisor
Set Exterior lights Timers at Poplar, Lincoln and Willowood on at 5:00 pm									▲				Working Supervisor
Check Exterior Lighting - Clark					▲						▲		Working Supervisor
Check Exterior Lighting - Lincoln					▲						▲		Working Supervisor
Check Exterior Lighting - Main Office					▲						▲		Working Supervisor
Check Exterior Lighting - McPherson					▲						▲		Working Supervisor
Check Exterior Lighting - Poplar					▲						▲		Working Supervisor
Check Exterior Lighting - Riverdale Comm/maint Building					▲						▲		Working Supervisor
Check Exterior Lighting - Sheedy					▲						▲		Working Supervisor
Check Exterior Lighting - Willowood											▲		Working Supervisor
Clear all Debris from all Roof areas - Clark, Sheedy, McPherson								▲					Working Supervisor
Install/Remove A/C - Fiscal & Main Offices					▲					▲			Working Supervisor
Snake Selected Sewer Drain Lines Bi-Weekly in Riverdale Park	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	Working Supervisor
Stock all sites with Bagged Ice Melt										▲			Working Supervisor
Clean Gutters/Repair Joints - Griffin Court											▲		Working Supervisor
Clean Gutters/Repair Joints - Lincoln Park											▲		Working Supervisor
Clean Gutters/Repair Joints - Poplar Park											▲		Working Supervisor
Install/Remove A/C - Poplar Comm Room					▲					▲			Working Supervisor
Test A/C - Clark, Main Office, McPherson, Sheedy, Willowood					▲								Working Supervisor
Remove All A/C units - Fiscal & Main Offices, LP,PP, Riverdale Comm.Rms.										▲			Working Supervisor
Change Heat Filters - Clark									▲				Working Supervisor
Clean Laundry Room Behind Dryers - Sheedy, Clark, LP, PP, McPh.	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	Working Supervisor
Disinfect Trash Barrels & Trash Room, Sheedy, Clark				▲						▲			Working Supervisor
Empty Smoking Recepticles -Clark, McPherson, Sheedy	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	Working Supervisor

## GHA Preventative Routine HA Requested Maintenance

9/12/2022

Item	Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec	Responsible Party
Loose Grounds Trash Pickup at Riverdale, Willowood, Lincoln, Poplar -2nd & 15th of each month	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	Working Supervisor
Set Up Xmas Tree in Community Room, & Install Lights on Outdoor Trees/shrubs - Lincoln, Poplar, McPherson, Sheedy Clark												▲	Working Supervisor
Remove Xmas Tree in Community Room, & Install Lights on Outdoor Trees/shrubs - Lincoln, Poplar, McPherson, Sheedy Clark	▲												Working Supervisor
Laundry Room - All Elderly - Clean & Sanitize all laundry equipment, wiping down inside of the machine with a bleached based cleaner. Run washing machines on a bleach wash cycle with hot water.	▲			▲			▲			▲			Working Supervisor

## GHA Preventative/Scheduled Maintenance

Item	Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec	Responsible Party
Boiler Room Inspections/Oil Lube motors - Lincoln	▲				▲			▲			▲		Staff Plumber
Boiler Room Inspections/Oil Lube motors- Poplar	▲				▲			▲			▲		Staff Plumber
Boiler Room Inspections/Oil Lube motors - Macpherson	▲				▲			▲			▲		Staff Plumber
Boiler Room Inspections/Oil Lube motors- Clark	▲				▲			▲			▲		Staff Plumber
Check Antifreeze level in Heating System-Essex St Apts											▲		Staff Plumber
Boiler Room Inspections - Hillcrest		▲				▲				▲			Staff Plumber
Boiler Room Inspections - Main Office		▲				▲				▲			Staff Plumber
Boiler Room Inspections - Mason		▲				▲				▲			Staff Plumber
Boiler Room Inspections - Prospect Sq.		▲				▲				▲			Staff Plumber
Boiler Room Inspections - Sargent		▲				▲				▲			Staff Plumber
Boiler Room Inspections - Sheedy		▲				▲				▲			Staff Plumber
Boiler Room Inspections/Oil Lube motors- Willowood		▲				▲				▲			Staff Plumber
Replace the Aqualine AP431 Scale Inhibitor Filters in all Boiler Rooms			▲							▲			Staff Plumber
Inspect and Recharge all Fire extinguishers/ Call Vendor to Schedule								▲					Working Supervisor
Change Heat Filters - Clark										▲			Working Supervisor
Change Furnace Filters - Riverdale									▲				Working Supervisor
Check Compactor Eye, gauge, oil & hydraulics - McPherson					▲						▲		Working Supervisor
Check Compactor Eye, gauge, oil & hydraulics - Sheedy					▲						▲		Working Supervisor
Check all Crawlspace/Test Sump pumps - Poplar									▲				Working Supervisor
Check Crawlspace/Evidence of Mold - Poplar									▲				Working Supervisor
Check Emergency Lights - Clark											▲		Working Supervisor
Check Emergency Lights - Lincoln Comm Room					▲						▲		Working Supervisor
Check Emergency Lights - McPherson					▲						▲		Working Supervisor
Check Emergency Lights - Poplar Comm Room					▲						▲		Working Supervisor
Check Emergency Lights - Riverdale Comm Room					▲						▲		Working Supervisor
Check Emergency Lights - Sheedy					▲						▲		Working Supervisor
Check Emergency Lights - Willowood Comm Room					▲						▲		Working Supervisor
Clear out any debris from bridge culvert entrances - Poplar					▲					▲			Working Supervisor
Clean out Grease Trap - McPherson				▲						▲			Working Supervisor
Change all Air Filter, water jet clean all condenser coils -McP Com.Rm. Air Handler					▲						▲		Working Supervisor
Boiler Inspection - Essex								▲					Staff Plumber
Boiler Inspection - Griffin								▲					Staff Plumber
Inspect Both Bridge Culverts - Poplar Park				▲						▲			Working Supervisor
Inspect/Repair Roof Exhaust Fans - Clark				▲				▲				▲	Working Supervisor
Inspect/Repair Roof Exhaust Fans - McPherson				▲				▲				▲	Working Supervisor
Inspect/Repair Roof Exhaust Fans - Sheedy				▲				▲				▲	Working Supervisor

## GHA Preventative/Scheduled Maintenance

Item	Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec	Responsible Party
Change all filters in Roof Makeup Air unit - Sheedy							▲						Working Supervisor
Test/Check Emergency Generator - Clark	▲		▲		▲		▲		▲		▲		Working Supervisor
Test/Check Emergency Generator - McPherson	▲		▲		▲		▲		▲		▲		Working Supervisor
Test/Check Emergency Generator - Sheedy	▲		▲		▲		▲		▲		▲		Working Supervisor
Test run Sprinkler Pump and grease bearings at Clark Building		▲				▲				▲			Working Supervisor
Test run Sprinkler Pump and grease bearings at Sheedy Building			▲				▲				▲		Working Supervisor
Test run Sprinkler Pump and grease bearings at McPherson Building				▲				▲				▲	Working Supervisor
Replace Aqualine AP431 Water Filter Cartridges at Poplar Park			▲						▲				Working Supervisor
Replace Aqualine AP431 Water Filter Cartridges at Lincoln Park			▲						▲				Staff Plumber
Replace Aqualine AP431 Water Filter Cartridges at Sheedy Bldg.			▲						▲				Staff Plumber
Replace Aqualine AP431 Water Filter Cartridges at Clark Bldg.			▲						▲				Staff Plumber
Replace Aqualine AP431 Water Filter Cartridges at Willowood Gardens			▲						▲				Staff Plumber
Replace Water Filter on Viesman Boiler at McPherson Park				▲									Staff Plumber
Renew all Acid Nurtralizer cartridges for Boiler water drains at Poplar Park								▲					Staff Plumber
Renew all Acid Nurtralizer cartridges for Boiler water drains at Lincoln Park								▲					Staff Plumber
Renew all Acid Nurtralizer cartridges for Boiler water drains at Sheedy Park								▲					Staff Plumber
Renew all Acid Nurtralizer cartridges for Boiler water drains at Clark Building								▲					Staff Plumber
Renew all Acid Nurtralizer cartridges for Boiler water drains at Willowood								▲					Staff Plumber
any sediment from boiler and components, Clean out Condensate Trap, Service								▲					Staff Plumber
Check all Hydraulics for Leaks, Inspect and Test all Operating Components, Contact									▲				Staff Plumber
Lochinvar Boiler Maint. Clean Heat Exchanger, Ign and Flame sensor electrodes. Operate Relief Valve. Inspect All vents for leaks. <b>Poplar</b> Boiler Rm 1							▲						Staff Plumber
Lochinvar Boiler Maint. Clean Heat Exchanger, Ign and Flame sensor electrodes. Operate Relief Valve. Inspect All vents for leaks. <b>Poplar</b> Boiler Rm 2							▲						Staff Plumber
Lochinvar Boiler Maint. Clean Heat Exchanger, Ign and Flame sensor electrodes. Operate Relief Valve. Inspect All vents for leaks. <b>Poplar</b> Boiler Rm 3							▲						Staff Plumber
Lochinvar Boiler Maint. Clean Heat Exchanger, Ign and Flame sensor electrodes. Operate Relief Valve. Inspect All vents for leaks. <b>Poplar</b> Boiler Rm 4							▲						Staff Plumber
Lochinvar Boiler Maint. Clean Heat Exchanger, Ign and Flame sensor electrodes. Operate Relief Valve. Inspect All vents for leaks. <b>Poplar</b> Boiler Rm 5							▲						Staff Plumber
Lochinvar Boiler Maint. Clean Heat Exchanger, Ign and Flame sensor electrodes. Operate Relief Valve. Inspect All vents for leaks. <b>Poplar</b> Boiler Rm 6								▲					Staff Plumber
Lochinvar Boiler Maint. Clean Heat Exchanger, Ign and Flame sensor electrodes. Operate Relief Valve. Inspect All vents for leaks <b>Lincoln</b> Boiler Rm 1								▲					Staff Plumber

### GHA Preventative/Scheduled Maintenance

Item	Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec	Responsible Party
Lochinvar Boiler Maint. Clean Heat Exchanger, Ign and Flame sensor electrodes. Operate Relief Valve. Inspect All vents for leaks <b>Lincoln</b> Boiler Rm 2								▲					Staff Plumber
Lochinvar Boiler Maint. Clean Heat Exchanger, Ign and Flame sensor electrodes. Operate Relief Valve. Inspect All vents for leaks. <b>Lincoln</b> Boiler Rm 3								▲					Staff Plumber
Lochinvar Boiler Maint. Clean Heat Exchanger, Ign and Flame sensor electrodes. Operate Relief Valve. Inspect All vents for leaks. <b>Lincoln</b> Boiler Rm 4								▲					Staff Plumber
Tes/Run Emergency Generators at Main Office, Lincoln & Poplar Parks	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	Working Supervisor

## GHA Preventative Routine HA Requested Maintenance

9/12/2022

Item	Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec	Responsible Party
Turn on Outside Water Spikots-Lincoln , Poplar, Arthur St					▲								Working Supervisor
Turn off Outside Water Spikots-Lincoln , Poplar, Arthur St										▲			Working Supervisor
Call Pitney Bowes to Service/Clean Mailing Machine					▲						▲		Operations Director
Schedule Fire Alarm/Sprinkler Testing at all Highrises with Hayden					▲								Operations Director
Bleed Hot Water System - Sheedy	▲				▲			▲			▲		Staff Plumber
Bleed Hot Water System - McPherson	▲				▲			▲			▲		Staff Plumber
Inspect/replace bad bulbs all common area lighting -Clark	▲						▲						Working Supervisor
Inspect/replace bad bulbs all common area lighting - Sheedy	▲						▲						Working Supervisor
Inspect/replace bad bulbs all common lighting - McPherson	▲						▲						Working Supervisor
Set Exterior lights Timers at Poplar, Lincoln and Willowood on at 8:00 pm			▲										Working Supervisor
Set Exterior lights Timers at Poplar, Lincoln and Willowood on at 5:00 pm									▲				Working Supervisor
Check Exterior Lighting - Clark					▲						▲		Working Supervisor
Check Exterior Lighting - Lincoln					▲						▲		Working Supervisor
Check Exterior Lighting - Main Office					▲						▲		Working Supervisor
Check Exterior Lighting - McPherson					▲						▲		Working Supervisor
Check Exterior Lighting - Poplar					▲						▲		Working Supervisor
Check Exterior Lighting - Riverdale Comm/maint Building					▲						▲		Working Supervisor
Check Exterior Lighting - Sheedy					▲						▲		Working Supervisor
Check Exterior Lighting - Willowood											▲		Working Supervisor
Clear all Debris from all Roof areas - Clark, Sheedy, McPherson								▲					Working Supervisor
Install/Remove A/C - Fiscal & Main Offices					▲					▲			Working Supervisor
Snake Selected Sewer Drain Lines Bi-Weekly in Riverdale Park	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	Working Supervisor
Stock all sites with Bagged Ice Melt										▲			Working Supervisor
Clean Gutters/Repair Joints - Griffin Court											▲		Working Supervisor
Clean Gutters/Repair Joints - Lincoln Park											▲		Working Supervisor
Clean Gutters/Repair Joints - Poplar Park											▲		Working Supervisor
Install/Remove A/C - Poplar Comm Room					▲					▲			Working Supervisor
Test A/C - Clark, Main Office, McPherson, Sheedy, Willowood					▲								Working Supervisor
Remove All A/C units - Fiscal & Main Offices, LP,PP, Riverdale Comm.Rms.										▲			Working Supervisor
Change Heat Filters - Clark									▲				Working Supervisor
Clean Laundry Room Behind Dryers - Sheedy, Clark, LP, PP, McPh.	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	Working Supervisor
Disinfect Trash Barrels & Trash Room, Sheedy, Clark				▲						▲			Working Supervisor
Empty Smoking Recepticles -Clark, McPherson, Sheedy	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	Working Supervisor

## GHA Preventative Routine HA Requested Maintenance

9/12/2022

Item	Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec	Responsible Party
Loose Grounds Trash Pickup at Riverdale, Willowood, Lincoln, Poplar -2nd & 15th of each month	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	Working Supervisor
Set Up Xmas Tree in Community Room, & Install Lights on Outdoor Trees/shrubs - Lincoln, Poplar, McPherson, Sheedy Clark												▲	Working Supervisor
Remove Xmas Tree in Community Room, & Install Lights on Outdoor Trees/shrubs - Lincoln, Poplar, McPherson, Sheedy Clark	▲												Working Supervisor
Laundry Room - All Elderly - Clean & Sanitize all laundry equipment, wiping down inside of the machine with a bleached based cleaner. Run washing machines on a bleach wash cycle with hot water.	▲			▲			▲			▲			Working Supervisor

## Gloucester 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: All

Work Order Number	Completed Date/Time	Deferred Note	Deferred Type
41386	10/3/2016 12:50 PM	DONE, RIVERDALE DEVEL. WO43500	Deferred Maintenance Plan
41393	10/3/2016 2:58 PM	DONE CLARK BLD WO43501	Deferred Maintenance Plan
47351	10/24/2017 3:00 PM	DONE 27CBC, WO48767	Deferred Maintenance Plan
47680	11/7/2017 11:30 AM	DONE 28PC, WO 49725	Deferred Maintenance Plan
47681	11/7/2017 11:30 AM	DONE 28PC, WO49726	Deferred Maintenance Plan
47682	11/7/2017 11:30 AM	DONE 28PC, WO 49728	Deferred Maintenance Plan
47683	11/7/2017 11:30 AM	DONE 28PC, WO 49729	Deferred Maintenance Plan
47684	11/7/2017 11:30 AM	DONE 28PC WO 49730	Deferred Maintenance Plan
47685	11/7/2017 11:20 AM	DONE 28PC WO 49731	Deferred Maintenance Plan
47688	11/7/2017 11:30 AM	DONE 28PC WO 49732	Deferred Maintenance Plan
47689	11/7/2017 11:30 AM	DONE 28PC WO 49733	Deferred Maintenance Plan
47690	11/7/2017 11:30 AM	DONE 28PC WO 49734	Deferred Maintenance Plan
47691	11/7/2017 11:30 AM	DONE 28PC WO 49735	Deferred Maintenance Plan
47692	11/7/2017 11:45 AM	DONE 28PC WO 49736	Deferred Maintenance Plan
47693	11/7/2017 11:45 AM	DONE 28PC WO 49737	Deferred Maintenance Plan
47694	11/7/2017 11:45 AM	DONE 28PC WO 49738	Deferred Maintenance Plan
47695	11/7/2017 11:45 AM	DONE 28PC WO 49739	Deferred Maintenance Plan
47696	11/7/2017 11:45 AM	DONE 28PC WO 49740	Deferred Maintenance Plan
47697	11/7/2017 11:45 AM	DONE 28PC WO 49741	Deferred Maintenance Plan
47698	11/7/2017 11:45 AM	DONE 28PC WO 49742	Deferred Maintenance Plan
47699	11/7/2017 11:45 AM	DONE 28PC WO 49743	Deferred Maintenance Plan
47700	11/7/2017 11:45 AM	DONE 28PC WO 49744	Deferred Maintenance Plan
47701	11/7/2017 11:45 AM	DONE 28PC WO 49745	Deferred Maintenance Plan
47702	11/7/2017 11:45 AM	DONE 28PC WO 49746	Deferred Maintenance Plan
47884	10/26/2017 3:00 PM	DONE RP, OFFICE WO 48768	Deferred Maintenance Plan
48198	11/20/2017 11:00 AM	DONE MCPH BLDG. WO 48769	Deferred Maintenance Plan
48362	11/20/2017 3:15 PM	DONE 415 MCPH WO 48362	Deferred Maintenance Plan
48705	12/6/2017 2:40 PM	DONE 77VW WO 49770	Deferred Maintenance Plan
48706	12/6/2017 2:40 PM	DONE 77VW WO 49771	Deferred Maintenance Plan
48707	12/6/2017 2:40 PM	DONE 77VW WO 49772	Deferred Maintenance Plan
48708	12/6/2017 2:40 PM	DONE 77VW WO 49773	Deferred Maintenance Plan
48709	12/6/2017 2:40 PM	DONE 77VW WO 49774	Deferred Maintenance Plan
48710	12/6/2017 2:40 PM	DONE 77VW WO 49775	Deferred Maintenance Plan
48711	12/6/2017 2:40 PM	DONE 77VW WO 49776	Deferred Maintenance Plan
48712	12/6/2017 2:40 PM	DONE 77VW WO 49777	Deferred Maintenance Plan
48713	12/6/2017 2:40 PM	DONE 77VW WO 49778	Deferred Maintenance Plan
48714	12/6/2017 2:40 PM	DONE 77VW WO 49779	Deferred Maintenance Plan
48891	12/12/2017 2:58 PM	DONE 8PC WO 50069	Deferred Maintenance Plan
48892	12/12/2017 2:58 PM	DONE 8PC WO 50070	Deferred Maintenance Plan
48893	12/12/2017 2:58 PM	DONE 8PC WO 50071	Deferred Maintenance Plan
48894	12/12/2017 2:58 PM	DONE 8PC WO 50072	Deferred Maintenance Plan
48895	12/12/2017 2:58 PM	DONE 8PC WO 50073	Deferred Maintenance Plan
48896	12/12/2017 2:58 PM	DONE 8PC WO 50075	Deferred Maintenance Plan
48897	12/12/2017 2:58 PM	DONE 8PC WO 50076	Deferred Maintenance Plan
48898	12/12/2017 3:00 PM	DONE 8PC WO 50077	Deferred Maintenance Plan
49100	12/19/2017 1:30 PM	DONE 29PC WO 50159	Deferred Maintenance Plan
49101	12/19/2017 1:00 PM	DONE 29PC WO 50161	Deferred Maintenance Plan
49102	12/19/2017 1:00 PM	DONE 29PC WO 50162	Deferred Maintenance Plan
49103	12/19/2017 1:00 PM	DONE 29PC WO 50163	Deferred Maintenance Plan
49104	12/19/2017 1:00 PM	DONE 29PC WO 50164	Deferred Maintenance Plan

## Gloucester 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: All

49105	12/19/2017 1:30 PM	DONE 29PC WO 50165	Deferred Maintenance Plan
49106	12/19/2017 1:30 PM	DONE 29PC WO 50166	Deferred Maintenance Plan
49446	1/8/2018 2:40 PM	DONE 77VW WO 49724	Deferred Maintenance Plan
61703	3/18/2020 10:00 AM	DONE MCPH. WO#70949	Other
61732	3/16/2020 3:51 PM	DONE 53 CLARK WO 70951	Deferred Maintenance Plan
61744	3/19/2020 10:21 AM	DONE SP WO 63096	Deferred Maintenance Plan
61750	3/20/2020 11:18 AM	DONE 49B CBC WO 63551	Deferred Maintenance Plan
61761	3/25/2020 8:32 AM	DONE 109SP WO 63099	Deferred Maintenance Plan
61779	3/27/2020 11:06 AM	DONE 317 MCP WO 63375	Deferred Maintenance Plan
61780	3/30/2020 9:06 AM	DONE 44PC WO 63187	Other
61781	3/30/2020 12:00 PM	DONE 30WILLOW WO 62890	Deferred Maintenance Plan
61783	3/30/2020 1:51 PM	DONE 22A WILLOW WO 62893	Other
61790	3/31/2020 3:47 PM	DONE 33VW 63186	Other
61803	4/2/2020 11:27 AM	DONE 21PC WO 63177	Other
61805	4/2/2020 2:54 PM	DONE 8PC WO 62392	Other
61812	4/6/2020 10:43 AM	DONE 7-9 AS WO 62835	Deferred Maintenance Plan
61821	4/7/2020 12:14 PM	DONE 34WW WO 62885	Deferred Maintenance Plan
61822	4/7/2020 1:10 PM	DONE 8PC WO 63184	Deferred Maintenance Plan
61824	4/7/2020 2:13 PM	DONE 56VW WO 63178	Deferred Maintenance Plan
61826	4/7/2020 3:36 PM	DONE 69VW WO 63473	Deferred Maintenance Plan
61834	4/10/2020 12:00 AM	DONE 508MCP WO 63045	Deferred Maintenance Plan
61835	4/10/2020 12:00 AM	DONE 13CBC WO 63393	Deferred Maintenance Plan
61837	4/10/2020 10:38 AM	DONE MCPH WO 62918	Deferred Maintenance Plan
61838	4/10/2020 10:42 AM	DONE PP WO 62915	Deferred Maintenance Plan
61839	4/10/2020 10:44 AM	DONE CBC WO 63278	Deferred Maintenance Plan
61840	4/10/2020 10:45 AM	DONE MCPH WO 62916	Deferred Maintenance Plan
61841	4/10/2020 10:47 AM	DONE SP WO 63434	Deferred Maintenance Plan
61842	4/10/2020 10:49 AM	DONE MCPH WO 63395	Deferred Maintenance Plan
61843	4/9/2020 11:32 AM	DONE MCPH WO 62935	Deferred Maintenance Plan
61844	4/9/2020 11:33 AM	DONE CBC WO 62930	Deferred Maintenance Plan
61845	4/10/2020 10:54 AM	DONE MCPH WO 62917	Deferred Maintenance Plan
61846	4/10/2020 10:55 AM	DONE LP WO 62809	Deferred Maintenance Plan
61847	4/10/2020 10:57 AM	DONE PP WO 62914	Deferred Maintenance Plan
61850	4/9/2020 2:34 PM	DONE 33PP WO 62919	Deferred Maintenance Plan
61853	4/13/2020 9:17 AM	DONE 13CBC WO 63393	Deferred Maintenance Plan
61856	4/13/2020 11:04 AM	DONE 24A WILLOW WO 62892	Deferred Maintenance Plan
61859	4/14/2020 9:14 AM	DONE 615 MCP WO 63044	Deferred Maintenance Plan
61875	4/16/2020 10:40 AM	DONE 414SP - WO70987	Deferred Maintenance Plan
61876	4/16/2020 9:15 AM	DONE 414 SP WO 63183	Deferred Maintenance Plan
61877	5/12/2020 9:19 AM	DONE 26A WS-WO#70923	Deferred Maintenance Plan
61880	4/16/2020 9:51 AM	DONE 47PC WO 63576	Deferred Maintenance Plan
61881	4/16/2020 9:54 AM	DONE 47PC WO 63176	Deferred Maintenance Plan
61882	4/16/2020 10:11 AM	DONE 105VW WO 63182	Deferred Maintenance Plan
61883	4/16/2020 10:13 AM	DONE 105VW WO 63181	Deferred Maintenance Plan
61884	4/16/2020 10:15 AM	DONE 105VW WO 63180	Deferred Maintenance Plan
61892	4/21/2020 8:39 AM	DONE 404SP WO 63151	Deferred Maintenance Plan
61893	4/21/2020 8:58 AM	DONE W117SP WO 63150	Deferred Maintenance Plan
61894	4/21/2020 11:45 AM	DONE 117SP-WO#70950	Deferred Maintenance Plan
61895	4/21/2020 9:06 AM	DONE 117SP - WO70988	Deferred Maintenance Plan
61897	4/21/2020 9:48 AM	DONE 36PC WO 63575	Deferred Maintenance Plan
61898	4/21/2020 9:54 AM	DONE 36PC WO 63574	Deferred Maintenance Plan

## Gloucester 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: All

61903	4/22/2020 8:38 AM	DONE 31PC - WO#67594	Deferred Maintenance Plan
61904	4/22/2020 8:42 AM	DONE 31PC - WO#67594	Deferred Maintenance Plan
61905	4/22/2020 8:42 AM	DONE 31PC - WO#67594	Deferred Maintenance Plan
61906	4/22/2020 8:58 AM	DONE 31PC - WO# 67594	Deferred Maintenance Plan
61907	4/22/2020 9:01 AM	DONE 31PC - WO #67594	Deferred Maintenance Plan
61908	4/22/2020 9:03 AM	DONE 31PC - WO#67594	Deferred Maintenance Plan
61921	4/23/2020 8:14 AM	DONE 333WS WO 63519	Deferred Maintenance Plan
61922	4/23/2020 8:38 AM	DONE 333WS WO 63520	Deferred Maintenance Plan
61923	4/23/2020 8:19 AM	DONE 333WS WO 63522	Deferred Maintenance Plan
61924	4/23/2020 8:22 AM	DONE 333WS WO 63517	Deferred Maintenance Plan
61925	4/23/2020 8:24 AM	DONE 333WS WO 63518	Deferred Maintenance Plan
61955	4/29/2020 2:54 PM	DONE 26A WS - WO#70924	Deferred Maintenance Plan
61956	4/29/2020 3:51 PM	DONE 26A WS - WO#70917	Other
61957	4/29/2022 3:51 PM	DONE 26A WS - WO70916	Deferred Maintenance Plan
61958	4/29/2020 3:00 PM	DONE 26A WS - WO#70925	Other
61960	4/29/2020 3:01 PM	DONE 26A WS-WO#70926	Other
61961	4/29/2020 3:02 PM	DONE 26A WS - WO#70918	Deferred Maintenance Plan
61962	4/29/2020 3:20 PM	DONE 31PC - WO#67594	Deferred Maintenance Plan
61963	4/29/2020 3:10 PM	DONE 31PC - WO#67594	Deferred Maintenance Plan
61964	4/29/2020 3:11 PM	DONE 333WS WO 63521	Deferred Maintenance Plan
61967	5/1/2020 8:58 AM	DONE 513 MCP WO 63394	Deferred Maintenance Plan
61971	5/1/2020 11:24 AM	DONE 7-8 AS WO 62891	Deferred Maintenance Plan
61974	5/4/2020 2:59 PM	DONE 608 MCP WO 62882	Deferred Maintenance Plan
61978	5/5/2020 3:40 PM	DONE 72VW WO 63516	Deferred Maintenance Plan
61981	5/6/2020 2:00 PM	DONE 14PP-WO#70948	Deferred Maintenance Plan
62008	5/12/2020 11:08 AM	DONE 57 CBC WO 63543	Deferred Maintenance Plan
62019	5/13/2020 1:20 PM	DONE 22VW WO 63474	Deferred Maintenance Plan
62035	5/14/2020 2:14 PM	DONE 69VW WO 63473	Deferred Maintenance Plan
62038	5/14/2020 3:14 PM	DONE 42PP WO 62931	Deferred Maintenance Plan
62044	5/18/2020 1:34 PM	DONE 39VW WO 63475	Deferred Maintenance Plan
62047	5/18/2020 2:40 PM	DONE 30PP WO 62920	Deferred Maintenance Plan
62056	5/19/2020 1:21 PM	DONE 50CBC WO 63392	Deferred Maintenance Plan
62064	5/20/2020 3:30 PM	DONE 43VW WO 63476	Other
62080	5/26/2020 2:51 PM	DONE 10PC WO 63477	Deferred Maintenance Plan
62086	6/1/2020 3:00 PM	DONE 23CBC WO 63383	Other
62088	5/27/2020 12:42 PM	DONE 505 SP WO 63155	Deferred Maintenance Plan
62091	5/27/2020 3:17 PM	DONE 5LP WO 63103	Deferred Maintenance Plan
62093	6/1/2020 3:00 PM	DONE 17PP WO 62921	Other
62109	6/1/2020 4:14 PM	DONE 25PC WO 63478	Deferred Maintenance Plan
62117	6/3/2020 8:47 AM	DONE 40CBC WO 63390	Deferred Maintenance Plan
62121	6/3/2020 11:34 AM	DONE 4CW WO 62834	Deferred Maintenance Plan
62122	6/3/2020 11:36 AM	DONE 4CW WO 62833	Deferred Maintenance Plan
62124	6/4/2020 8:32 AM	DONE 22LP WO 62888	Deferred Maintenance Plan
62133	6/5/2020 10:13 AM	DONE 49VW WO 62816	Deferred Maintenance Plan
62136	6/8/2020 8:59 AM	DONE 17LP WO 62836	Deferred Maintenance Plan
62138	6/8/2020 10:14 AM	DONE 49VW WO 62811	Deferred Maintenance Plan
62140	6/8/2020 11:44 AM	DONE 58PP WO 62922	Deferred Maintenance Plan
62141	6/8/2020 11:50 AM	DONE 50LP WO 63168	Deferred Maintenance Plan
62153	6/9/2020 10:40 AM	DONE 22PP WO 62923	Deferred Maintenance Plan
62158	6/9/2020 1:32 PM	DONE 503SP WO 63167	Deferred Maintenance Plan
62160	6/9/2020 2:02 PM	DONE 30PP WO 62924	Deferred Maintenance Plan

## Gloucester 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: All

62166	6/9/2020 3:53 PM	DONE	333 WS WO 63489	Deferred Maintenance Plan
62173	6/10/2020 1:18 PM	DONE	35LP WO 62889	Deferred Maintenance Plan
62174	6/10/2020 1:37 PM	DONE	63VW WO 63486	Deferred Maintenance Plan
62180	6/11/2020 10:10 AM	DONE	606MCP WO 63380	Deferred Maintenance Plan
62181	6/11/2020 10:42 AM	DONE	67PP WO 62932	Deferred Maintenance Plan
62182	6/11/2020 12:04 PM	DONE	22VW WO 62884	Deferred Maintenance Plan
62194	6/15/2020 9:39 AM	DONE	69VW WO 63487	Deferred Maintenance Plan
62196	6/15/2020 12:03 PM	DONE	49A CBC WO 63387	Deferred Maintenance Plan
62198	6/15/2020 3:31 PM	DONE	57CBC WO 63386	Deferred Maintenance Plan
62199	6/15/2020 3:33 PM	DONE	57CBC WO 63543	Deferred Maintenance Plan
62200	6/15/2020 3:36 PM	DONE	57CBC WO 62602	Deferred Maintenance Plan
62215	6/17/2020 10:38 AM	DONE	12VW WO 63515	Deferred Maintenance Plan
62216	6/17/2020 10:42 AM	DONE	29VW WO 63513	Deferred Maintenance Plan
62217	6/17/2020 10:46 AM	DONE	16VW WO 63514	Deferred Maintenance Plan
62219	6/17/2020 12:04 PM	DONE	55PC WO 63481	Deferred Maintenance Plan
62223	6/18/2020 10:13 AM	DONE	36PC WO 63480	Deferred Maintenance Plan
62224	6/18/2020 10:45 AM	DONE	32LP WO 62771	Deferred Maintenance Plan
62229	6/19/2020 9:14 AM	DONE	27PP WO 62927	Deferred Maintenance Plan
62232	6/22/2020 8:47 AM	DONE	PP WO 62928	Deferred Maintenance Plan
62235	6/22/2020 11:17 AM	DONE	404MCP WO 63379	Deferred Maintenance Plan
62237	6/22/2020 3:16 PM	DONE	25LP WO 63104	Deferred Maintenance Plan
62238	6/22/2020 3:19 PM	DONE	318MCP WO 63353	Deferred Maintenance Plan
62243	6/23/2020 12:44 PM	DONE	619MCP WO 62895	Deferred Maintenance Plan
62244	6/23/2020 1:28 PM	DONE	412SP WO 63165	Deferred Maintenance Plan
62271	6/25/2020 2:37 PM	DONE	519MCP WO 62894	Deferred Maintenance Plan
62277	6/26/2020 10:32 AM	DONE	618MCP WO 63378	Deferred Maintenance Plan
62284	6/29/2020 9:48 AM	DONE	36VW WO 62886	Deferred Maintenance Plan
62285	6/29/2020 10:07 AM	DONE	48PP WO 62929	Deferred Maintenance Plan
62290	6/29/2020 1:48 PM	DONE	28VW WO 62887	Deferred Maintenance Plan
62295	6/30/2020 10:28 AM	DONE	49VW WO 63485	Deferred Maintenance Plan
62306	7/1/2020 11:37 AM	DONE	91VW WO 63488	Deferred Maintenance Plan
62308	7/1/2020 11:51 AM	DONE	25PC WO 63479	Deferred Maintenance Plan
62317	7/2/2020 3:23 PM	DONE	99VW WO 63374	Deferred Maintenance Plan
62332	7/8/2020 11:09 AM	DONE	419MCP WO 62934	Deferred Maintenance Plan
62341	7/9/2020 11:40 AM	DONE	416SP WO 63164	Deferred Maintenance Plan
62346	7/10/2020 8:30 AM	DONE	515MCP WO 63046	Deferred Maintenance Plan
62361	7/14/2020 11:08 AM	DONE	23CBC WO 63383	Deferred Maintenance Plan
62374	7/15/2020 12:01 PM	DONE	34CBC WO 63472	Deferred Maintenance Plan
62383	7/16/2020 12:04 PM	DONE	603MCP WO 63381	Deferred Maintenance Plan
62390	7/20/2020 8:35 AM	DONE	305SP WO 63166	Deferred Maintenance Plan
62391	7/20/2020 8:52 AM	DONE	218SP WO 63154	Deferred Maintenance Plan
62395	7/20/2020 9:55 AM	DONE	13VW WO 63173	Deferred Maintenance Plan
62399	7/20/2020 1:48 PM	DONE	27VW WO 63483	Deferred Maintenance Plan
62418	7/23/2020 3:20 PM	DONE	27VW WO 63105	Deferred Maintenance Plan
62419	7/23/2020 3:23 PM	DONE	24LP WO 63106	Deferred Maintenance Plan
62421	7/23/2020 3:50 PM	DONE	48VW WO 63484	Deferred Maintenance Plan
62447	7/28/2020 2:52 PM	DONE	115SP WO 63153	Deferred Maintenance Plan
62455	7/30/2020 10:31 AM	DONE	52LP WO 63169	Deferred Maintenance Plan
62974	10/26/2020 8:00 AM	DONE	CBC WO 63287	Other
63117	10/26/2020 8:10 AM	DONE	19MS#1 WO 63288	Other
63124	10/26/2020 8:12 AM	DONE	54PP WO 63289	Other

## Gloucester 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: All

63139	10/26/2020 2:18 PM	DONE 505SP WO 63290	Other
63144	10/27/2020 10:07 AM	DONE 62PP WO 63291	Deferred Maintenance Plan
63146	10/27/2020 11:30 AM	DONE 61PP WO 63192	Other
63156	10/28/2020 8:09 AM	DONE 115SP WO 63193	Deferred Maintenance Plan
63159	10/28/2020 1:39 PM	DONE 54PP WO 63194	Other
63199	11/2/2020 9:58 AM	DONE 318MCP WO 63511	Deferred Maintenance Plan
63203	11/2/2020 11:23 AM	DONE 93VW - WO#70942	Deferred Maintenance Plan
63213	5/24/2022 9:26 AM	DONE 35LP - WO 70986	Deferred Maintenance Plan
63271	5/24/2022 11:38 AM	DONE 43A MP- WO#70919	Deferred Maintenance Plan
63272	11/4/2020 4:15 PM	DONE 43A MP WO#70920	Deferred Maintenance Plan
63375	11/19/2020 8:15 AM	DONE 317MCP WO 63375	Other
63737	1/6/2021 11:36 AM	DONE 12VW - WO#70943	Deferred Maintenance Plan
63887	1/22/2021 12:00 AM	DONE 504SP - WO70990	Other
63900	1/25/2021 12:08 PM	DONE 317SP -WO#70993	Deferred Maintenance Plan
63940	1/29/2021 10:19 AM	DONE 22VW - WO#70945	Deferred Maintenance Plan
65118	5/20/2021 12:18 PM	DONE 48WW - WO#70927	Other
65121	4/28/2021 12:22 PM	DONE 48WW - WO# 70928	Other
65123	4/28/2021 12:26 PM	DONE 48WW - WO# 70929	Other
65126	4/28/2021 12:28 PM	DONE 48WW - WO# 70930	Other
65147	4/29/2021 2:58 PM	DONE 32WS - WO#70922	Other
66292	7/12/2021 3:35 PM	DONE-47-49WW-WO#70931	Other
66293	7/12/2021 3:36 PM	DONE 42WW - WO 70932	Other
66294	7/12/2021 3:38 PM	DONE 50WW - WO 70933	Other
66433	7/16/2021 12:47 PM	DONE 41-49 WW - WO#70934	Other
67681	10/21/2021 2:29 PM	DONE -18ES UNIT 1 - SEE WO 70935	Deferred Maintenance Plan
67682	10/21/2021 2:56 PM	DONE 18ES UNIT 1 - SEE WO 70936	Deferred Maintenance Plan
67683	11/24/2021 10:00 AM	DONE 18ES WO#70937	Deferred Maintenance Plan
67684	11/24/2021 10:01 AM	DONE 18ES UNIT 1 WO 70938	Deferred Maintenance Plan
67739	11/23/2021 10:54 AM	DONE -37VW WO#69644	Deferred Maintenance Plan
67740	11/23/2021 8:33 AM	DONE 37VW WO#69687	Deferred Maintenance Plan
67741	11/23/2021 8:47 AM	DONE 37VW WO#69689	Deferred Maintenance Plan
67742	11/23/2021 8:52 PM	DONE 37VW WO#69690	Deferred Maintenance Plan
67743	11/23/2021 11:10 AM	DONE 37VW WO#69691	Deferred Maintenance Plan
67744	11/23/2021 11:21 AM	DONE 37VW WO#69692	Deferred Maintenance Plan
67745	11/23/2021 11:22 AM	DONE 37VW WO#69693	Deferred Maintenance Plan
67746	11/23/2021 11:42 AM	DONE 37VW #69694	Deferred Maintenance Plan
67747	11/23/2021 12:00 AM	DONE 37VW WO#69696	Deferred Maintenance Plan
67754	11/23/2021 12:00 AM	DONE 37VW WO# 69698	Deferred Maintenance Plan
67755	11/23/2021 12:00 AM	DONE 37VW WO# 69700	Deferred Maintenance Plan
67756	11/23/2021 12:00 AM	DONE 37VW WO# 69701	Deferred Maintenance Plan
67758	10/25/2021 2:52 PM	DONE 37VW -WO #70947	Deferred Maintenance Plan
67759	11/23/2021 12:00 AM	DONE 37VW WO# 69703	Deferred Maintenance Plan
67760	11/23/2021 12:00 AM	DONE 37VW WO# 67760	Deferred Maintenance Plan
67761	11/23/2021 12:00 AM	DONE 37VW WO #69705	Deferred Maintenance Plan
67762	11/23/2021 12:00 AM	DONE 37VW WO 69706	Deferred Maintenance Plan
67763	11/23/2021 12:00 AM	DONE-37VW - see WO 69707	Deferred Maintenance Plan
68082	12/15/2021 12:54 PM	DONE 36WS - WO#70939	Deferred Maintenance Plan
68399	12/10/2022 12:00 AM	STILL LIVE - 402SP	Other
68544	12/14/2021 3:47 PM	DONE 46PC - WO 73713	Deferred Maintenance Plan
68545	12/14/2021 3:49 PM	DONE 46PC-WO 71102	Other
68548	12/14/2021 3:40 PM	DONE 46PC- WO 71103	Other

## Gloucester 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: All

68549	12/14/2021 3:42 PM	DONE 46PC - WO 71104	Other
68550	12/14/2021 3:44 PM	DONE 46PC - WO 71105	Other
68551	12/14/2021 3:50 PM	DONE 46PC - WO 71106	Other
68552	12/14/2021 3:50 PM	DONE 46PC - WO 71107	Other
68553	12/14/2021 3:51 PM	DONE 46PC - WO#71109	Other
68554	12/14/2021 3:51 PM	DONE 46PC - WO#71110	Other
68555	12/14/2021 3:52 PM	DONE 46PC - WO# 71111	Other
68556	12/14/2021 3:53 PM	DONE 46PC - WO#71112	Other
68557	12/14/2021 3:56 PM	DONE 46PC - WO#71113	Other
68558	12/14/2021 3:53 PM	DONE46PC - WO 71114	Other
68559	12/14/2021 3:54 PM	DONE 46PC - WO 71115	Other
68560	12/14/2021 3:54 PM	DONE 46PC WO#71116	Other
68561	1/11/2022 3:55 PM	DONE 46PC - WO #71117	Other
68562	1/11/2022 3:59 PM	DONE 46PC - WO 71118	Other
68563	1/11/2022 3:56 PM	DONE 46PC - WO 71119	Other
68564	1/11/2022 3:57 PM	DONE 46PC - WO 71120	Other
68565	1/11/2022 3:57 PM	DONE 46PC -WO #71121	Other
68566	1/11/2022 3:57 PM	DONE 46PC - WO 71122	Other
68567	1/11/2022 3:58 PM	DONE 46PC - WO 71123	Other
68568	1/11/2022 3:58 PM	DONE 46PC - WO 71124	Other
68569	1/11/2022 3:59 PM	DONE 46PC - WO#71125	Other
68570	1/11/2022 3:59 AM	DONE 46PC - WO 71126	Other
68598	1/12/2022 12:58 PM	DONE-10PC WO#69646	Other
68599	1/12/2022 1:00 PM	DONE 10PC WO#69715	Other
68600	1/12/2022 1:01 PM	DONE 10PC WO#69716	Other
68601	1/12/2022 1:03 PM	DONE 10PC WO#69717	Other
68602	1/12/2022 1:04 PM	DONE 10PC WO#69718	Other
68603	1/12/2022 1:05 PM	DONE 10PC WO#69719	Other
68604	1/12/2022 1:06 PM	DONE-10PC WO#69647	Other
68605	1/12/2022 1:07 PM	DONE 10PC WO#69720	Other
68996	1/25/2022 1:36 PM	DONE 93VW -WO#70994	Other
69624	3/22/2022 11:31 AM	DONE 8VW - WO 70995	Other
69626	5/24/2022 11:39 AM	DONE 8VW-WO 70996	Other
69627	5/24/2022 7:01 AM	DONE 8VW-WO 70997	Other
69658	4/7/2022 7:45 AM	DONE 48PC -WO 70998	Other
69659	4/7/2022 7:45 AM	DONE 48PC - WO 70999	Other
69660	4/7/2022 7:46 AM	DONE 48PC-WO#71000	Other
69789	4/6/2022 9:27 AM	DONE 43VW - WO 71001	Other
70078	4/27/2022 1:09 PM	DONE 7-9 AS - WO 71654	Other
70079	4/27/2022 1:10 PM	DONE 7-9 AS - WO 71654	Other
70080	4/27/2022 1:11 PM	DONE 7-9 AS - WO 71654	Other
70081	4/27/2022 1:11 PM	DONE 7-9 AS - WO 71654	Other
70082	4/27/2022 1:11 PM	DONE 7-9 AS - WO 71654	Other
70083	4/27/2022 1:12 PM	DONE 7-9 AS - WO 71654	Other
70084	4/27/2022 1:12 PM	DONE 7-9 AS - WO 71654	Other
70085	4/27/2022 1:13 PM	DONE 7-9 AS - WO 71654	Other
70088	4/27/2022 1:13 PM	DONE 7-9 AS - WO 71654	Other
70089	4/27/2022 1:14 PM	DONE 7-9 AS - WO 71654	Other
70090	4/27/2022 1:14 PM	DONE 7-9 AS - WO 71654	Other
70091	4/27/2022 1:14 PM	DONE 7-9 AS - WO 71654	Other
70092	4/27/2022 1:15 PM	DONE 7-9 AS - WO 71654	Other

## Gloucester 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: All

70093	4/27/2022 1:15 PM	DONE 7-9 AS - WO 71654	Other
70094	4/27/2022 1:15 PM	DONE 7-9 AS - WO 71654	Other
70095	4/27/2022 1:16 PM	DONE 7-9 AS - WO 71654	Other
70096	4/27/2022 1:16 PM	DONE 7-9 AS - WO 71654	Other
70097	4/27/2022 1:17 PM	DONE 7-9 AS - WO 71654	Other
70098	4/27/2022 1:17 PM	DONE 7-9 AS - WO 71654	Other
70099	4/27/2022 1:18 PM	DONE 7-9 AS - WO 71654	Other
70100	4/27/2022 1:18 PM	DONE 7-9 AS - WO 71654	Other
70102	4/27/2022 1:18 PM	DONE 7-9 AS - WO 71654	Other
70127	5/4/2022 3:14 PM	DONE 1PC-WO 71323	Deferred Maintenance Plan
70209	5/3/2022 10:47 AM	DONE 4VW - WO 72289	Other
70409	5/17/2022 8:58 AM	DONE WO 72432	Other
70481	5/24/2022 8:58 AM	DONE 84VW - WO 71412	Other
70744	6/7/2022 8:56 AM	DONE 42WW - WO 72287	Other
70745	6/7/2022 8:57 AM	DONE 42WW - SEE WO 72284	Other
70746	6/7/2022 8:58 AM	DONE 42WW - WO 72285	Other
70747	6/7/2022 8:59 AM	DONE 42WW -WO 72286	Other
70901	6/24/2022 12:00 AM	DONE -WW site - See WO 72450	Deferred Maintenance Plan
70999	6/1/2022 10:30 AM	DONE 48PC - WO 70999	Other
71127	6/21/2022 10:09 AM	DONE 1PC - WO 70127	Other
71763	8/9/2022 9:03 AM	DONE 44WW - WO 73222	Other
71770	8/9/2022 9:04 AM	DONE 27VW- WO 72196	Deferred Maintenance Plan
72384	9/26/2022 2:56 PM	DONE RP - 73716	Deferred Maintenance Plan
72754	10/6/2022 12:00 AM	STILL LIVE - 95VW	Deferred Maintenance Plan
72987	10/25/2022 12:00 AM	STILL LIVE-MCP COM.ROOM	Deferred Maintenance Plan
73470	11/30/2022 8:46 AM	STILL LIVE 319MCP	Deferred Maintenance Plan
73537	12/2/2022 3:56 PM	DONE 50CBC WO 73800	Deferred Maintenance Plan
73583	12/6/2022 12:00 AM	STILL LIVE 51PP	Deferred Maintenance Plan
73860	12/26/2022 12:00 AM	STILL LIVE-MCPH BLD.	Deferred Maintenance Plan
73864	12/27/2022 12:00 AM	STILL LIVE - 605MCP	Deferred Maintenance Plan
73865	12/27/2022 12:00 AM	STILL LIVE - 307MCP	Deferred Maintenance 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 06/30/2022. 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.

**LHA Comments**

The GHA was pleased that DHCD allowed a 9% non-utility increase to our budget for the FYE 6/30/2023 but is very mindful of the impact inflation and other post-pandemic factors will have on our ability to offer the same level of service going forward. We will continue to offer an assortment of resident services initiatives including the DHCD-funded "A Better Life Program" (ABL), Housing First/THP (HFP) and Senior Supportive Housing at McPherson Park. ABL is designed to assist residents in family housing achieve their maximum earning potential and save for the future, HFP provides support to families transitioning from DHCD-funded homeless shelters and the Supportive Services Program at McPherson Park offers services that allows seniors to age in place with dignity. DHCD also increased funding this year for our Resident Services Grant, which allows us to provide service referrals and other support at our remaining State Housing Developments.

**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 Gloucester Housing Authority operating reserve at the end of fiscal year 2022 was \$1,334,764.00, which is 82.7% 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 Gloucester Housing Authority.						
<b>REVENUE</b>						
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	\$2,544,000.00	\$2,481,984.00	\$2,633,280.00	6.1%	\$420.38
3111	Shelter Rent - Tenants - Fraud/Retroactive	\$0.00	\$22,721.00	\$0.00	-100%	\$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	\$3,000.00	\$12,061.00	\$15,000.00	24.4%	\$2.39
3611	Interest on Investments - Restricted	\$0.00	\$0.00	\$0.00	0%	\$0.00
3690	Other Revenue	\$43,000.00	\$41,381.00	\$41,000.00	-0.9%	\$6.55
3691	Other Revenue - Retained	\$25,000.00	\$43,081.00	\$22,500.00	-47.8%	\$3.59
3692	Other Revenue - Operating Reserves	\$50,000.00	\$0.00	\$0.00	0%	\$0.00
3693	Other Revenue - Energy Net Meter	\$25,000.00	\$24,659.00	\$22,500.00	-8.8%	\$3.59
3801	Operating Subsidy - DHCD (4001)	\$658,749.00	\$592,294.00	\$766,613.00	29.4%	\$122.38
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	<b>TOTAL REVENUE</b>	<b>\$3,348,749.00</b>	<b>\$3,218,181.00</b>	<b>\$3,500,893.00</b>	<b>8.8%</b>	<b>\$558.89</b>

Consolidated Budget (400-1) for all state-aided 667 (Elderly), 200 (family), and 705 (scattered site family) developments owned by Gloucester Housing Authority.						
<b>EXPENSES</b>						
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	\$384,955.00	\$370,159.00	\$402,423.00	8.7%	\$64.24
4120	Compensated Absences	\$0.00	\$63,731.00	\$0.00	-100%	\$0.00
4130	Legal	\$124,656.00	\$73,109.00	\$86,997.00	19%	\$13.89
4140	Members Compensation	\$19,400.00	\$16,258.00	\$20,000.00	23%	\$3.19
4150	Travel & Related Expenses	\$3,000.00	\$1,244.00	\$4,000.00	221.5%	\$0.64
4170	Accounting Services	\$20,760.00	\$20,760.00	\$24,000.00	15.6%	\$3.83
4171	Audit Costs	\$11,920.00	\$10,260.00	\$8,000.00	-22%	\$1.28
4180	Penalties & Interest	\$0.00	\$0.00	\$0.00	0%	\$0.00
4190	Administrative Other	\$140,000.00	\$160,606.00	\$148,609.00	-7.5%	\$23.72
4191	Tenant Organization	\$1,566.00	\$695.00	\$1,566.00	125.3%	\$0.25
4100	TOTAL ADMINISTRATION	\$706,257.00	\$716,822.00	\$695,595.00	-3%	\$111.05
4310	Water	\$366,903.00	\$272,071.00	\$362,141.00	33.1%	\$57.81
4320	Electricity	\$300,128.00	\$251,802.00	\$297,103.00	18%	\$47.43
4330	Gas	\$111,337.00	\$137,480.00	\$162,815.00	18.4%	\$25.99
4340	Fuel	\$0.00	\$0.00	\$0.00	0%	\$0.00
4360	Net Meter Utility Debit/Energy Conservation	\$0.00	\$49,318.00	\$0.00	-100%	\$0.00
4390	Other	\$0.00	\$0.00	\$0.00	0%	\$0.00
4391	Solar Operator Costs	\$96,000.00	\$91,981.00	\$141,000.00	53.3%	\$22.51
4392	Net Meter Utility Credit (Negative Amount)	-\$96,000.00	-\$141,299.00	-\$141,000.0	-0.2%	-\$22.51
4300	TOTAL UTILITIES	\$778,368.00	\$661,353.00	\$822,059.00	24.3%	\$131.24

Consolidated Budget (400-1) for all state-aided 667 (Elderly), 200 (family), and 705 (scattered site family) developments owned by Gloucester Housing Authority.						
<b>EXPENSES</b>						
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	\$556,189.00	\$468,905.00	\$585,449.00	24.9%	\$93.46
4420	Materials & Supplies	\$227,383.00	\$235,008.00	\$272,068.00	15.8%	\$43.43
4430	Contract Costs	\$390,893.00	\$370,690.00	\$424,500.00	14.5%	\$67.77
4400	TOTAL MAINTENANCE	\$1,174,465.00	\$1,074,603.00	\$1,282,017.00	19.3%	\$204.66
4510	Insurance	\$141,717.00	\$117,316.00	\$156,127.00	33.1%	\$24.92
4520	Payment in Lieu of Taxes	\$5,760.00	\$5,760.00	\$5,760.00	0%	\$0.92
4540	Employee Benefits	\$542,182.00	\$529,250.00	\$529,562.00	0.1%	\$84.54
4541	Employee Benefits - GASB 45	\$0.00	\$170,514.00	\$0.00	-100%	\$0.00
4542	Pension Expense - GASB 68	\$0.00	\$0.00	\$0.00	0%	\$0.00
4570	Collection Loss	\$15,000.00	\$26,823.00	\$30,000.00	11.8%	\$4.79
4571	Collection Loss - Fraud/Retroactive	\$0.00	\$22,721.00	\$0.00	-100%	\$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	\$704,659.00	\$872,384.00	\$721,449.00	-17.3%	\$115.17
4610	Extraordinary Maintenance	\$60,646.00	\$33,285.00	\$76,850.00	130.9%	\$12.27
4611	Equipment Purchases - Non Capitalized	\$75,500.00	\$41,017.00	\$54,000.00	31.7%	\$8.62
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	\$661,910.00	\$0.00	-100%	\$0.00
4600	TOTAL OTHER EXPENSES	\$136,146.00	\$736,212.00	\$130,850.00	-82.2%	\$20.89
4000	TOTAL EXPENSES	\$3,499,895.00	\$4,061,374.00	\$3,651,970.00	-10.1%	\$583.01

Consolidated Budget (400-1) for all state-aided 667 (Elderly), 200 (family), and 705 (scattered site family) developments owned by Gloucester Housing Authority.						
<b>SUMMARY</b>						
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	\$3,348,749.00	\$3,218,181.00	\$3,500,893.00	8.8%	\$558.89
4000	TOTAL EXPENSES	\$3,499,895.00	\$4,061,374.00	\$3,651,970.00	-10.1%	\$583.01
2700	NET INCOME (DEFICIT)	\$-151,146.00	\$-843,193.00	\$-151,077.00	-82.1%	\$-24.12
7520	Replacements of Equip. - Capitalized	\$59,100.00	\$56,457.00	\$32,001.00	-43.3%	\$5.11
7540	Betterments & Additions - Capitalized	\$95,000.00	\$211,279.00	\$9,000.00	-95.7%	\$1.44
7500	TOTAL NONOPERATING EXPENDITURES	\$154,100.00	\$267,736.00	\$41,001.00	-84.7%	\$6.55
7600	EXCESS REVENUE OVER EXPENSES	\$-305,246.00	\$-1,110,929.00	\$-192,078.00	-82.7%	\$-30.66

## 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.

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

The Performance Management Review conducted by the Department of Housing and Community Development (DHCD) for the 2022 LHA fiscal year resulted in the following ratings. Criteria which received a 'Corrective Action' rating show both a reason for the rating and a response by the LHA. The reason indicates Gloucester Housing Authority's understanding of why they received the rating, while the responses describe their goals and the means by which they will meet or improve upon the performance-based assessment standards established by DHCD in the PMR. When the PMR rating is 'Operational Guidance', the LHA may have responded, but was not required to.

### **Category: Management**

Criterion: Occupancy Rate - the percentage of units that are occupied on monthly report.

Rating: No Findings

Criterion: Tenant Accounts Receivable (TAR) - the percentage of uncollected rent and related charges owed by tenants to the local housing authority (LHA), out of the total amount of rent and related costs charged to tenants.

Rating: No Findings

Reason: Chapter 200 Program had 24 tenants with SHERA Eviction Protection that had outstanding balances as of 6/30/2022 and GHA was prohibited from taking further action until protections expired. In addition, Northeast Housing Court has a significant backlog of cases and new cases were not being initially heard until 60 days after filing, which resulted in higher account balances.

Response: All SHERA protections have now expired, and GHA has commenced court action on any remaining tenants who failed to comply with in-house re-payment agreements.

Criterion: Certifications and Reporting Submissions - timely submission of statements and certifications

Rating: No Findings

Criterion: Completion of mandatory online board member training

Rating: No Findings

Criterion: Annual Plan Submitted - Annual Plan (AP) submitted on time

Rating: No Findings

Criterion: Staff completed relevant certifications or trainings

Rating: No Findings

### **Category: Financial**

Criterion: Adjusted Net Income - a measure of overspending or underspending.

Rating: No Findings

Criterion: Current Operating Reserve as a percentage of total maximum reserve level.

Rating: No Findings

**Category: Capital Planning**

Criterion: Timely spending of capital funds awarded under the Formula Funding program

Rating: Operational Guidance

Reason: GHA worked diligently to ensure that all projects approved by the DHCD Project Design Unit moved swiftly into production, but several projects remained stagnant in design review. In addition, supply chain issues slowed two projects in construction.

Response: The GHA is working closely with all designers under contract to make sure that they meet submission deadlines and is communicating the need for expedient reviews to DHCD. Much of this is really beyond the GHA's ability to control.

**Category: CHAMP**

Criterion: Paper applications are available, received and entered into CHAMP

Rating: No Findings

Criterion: Vacancies are recorded correctly and occupied using CHAMP

Rating: Corrective Action

Reason: Several vacancies were not recorded in the DHCD HAFIS system during the fiscal year. The vacancies were related to administrative that occurred as a result of the McPherson ModPhase Project for residents that had to remain in temporary units due to extenuating circumstances. A second issue was related to unit offers being made to applicants prior to their applications being moved to the offer stage in the DHCD CHAMP system.

Response: The GHA is now verifying that all transfer information from our software systems match the DHCD HAFIS & CHAMP systems. Additional CHAMP training has been provided to staff and monitoring increased to insure that offers are being made at the correct stage within the CHAMP system.

**Category: Facility Management - Inspection Standards and Practices**

Criterion: 100% of units inspected during FYE under review

Rating: No Findings

Criterion: Unit inspection reports create, track, and report work orders for inspection repairs, and inspection WOs completed within 30 days or add to DM / CIP

Rating: No Findings

Criterion: Unit inspection reports accurately reflect necessary repairs

Rating: No Findings

**Category: Facility Management - Vacancy Turnover Standards and Practices**

Criterion: Work orders created for every vacancy and completed within 30 days (or waiver requested)

Rating: No Findings

Criterion: Vacancy turnover work orders accurately reflect necessary repairs

Rating: No Findings

**Category: Facility Management - Preventive Maintenance Standards and Practices**

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

Rating: No Findings

**Category: Facility Management - Work Order Types and Systems**

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

Rating: No Findings

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

Rating: No Findings

**Additional Remarks:**

FY 22 was a challenging year for the GHA due to the sudden deaths of two staff, and several retirements. The GHA Board and staff made an extraordinary effort to re-start the agency coming out of the pandemic and should be commended for their efforts.

Explanation of PMR Criteria Ratings

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

CRITERION	DESCRIPTION
<b>CHAMP</b>	
Paper applications	<p>Paper applications are available, received and entered into CHAMP</p> <ul style="list-style-type: none"> <li>• No Findings: Paper applications are available; And paper applications are date and time stamped correctly; And 90% of new paper applications are entered into CHAMP within 15 calendar days of date/time stamp; And 2% or less of new paper applications are entered more than 30 days after date/time stamp</li> <li>• Operational Guidance: Paper applications are available; And paper applications are date and time stamped and entered correctly; And 75% - 89% of new paper applications are entered into CHAMP within 15 calendar days; And 3% - 5% of new paper applications are entered more than 30 days after date/time stamp</li> </ul> <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"> <li>• 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</li> <li>• 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</li> <li>• 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</li> </ul>

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

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

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

CRITERION	DESCRIPTION
	<ul style="list-style-type: none"> <li>• Corrective Action: Not all emergency work orders are completed within 48 hours; Or less than 80% of work orders under review are correctly created, tracked and reported administratively</li> </ul>
Requested Work Orders	<p>All requested work orders are created, tracked, reported and completed within 14 days or added to DM/CIP</p> <ul style="list-style-type: none"> <li>• No Findings: All requested work orders under review are created, tracked, and reported; All work is complete within 14 days or added to DM/CIP</li> <li>• Operational Guidance: All requested work orders completed within 14 days or added to DM/CIP; And less than 100% of work orders under review are correctly created, tracked and reported</li> </ul> <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 Gloucester Housing Authority:

<b>Policy</b>	<b>Last Ratified by Board Vote</b>	<b>Notes</b>
*Rent Collection Policy		Policy adopted circa 1994. Board will review in FY 2023
*Personnel Policy	09/14/2022	
*Capitalization Policy	04/13/2016	
*Procurement Policy	01/12/2022	
*Grievance Policy	10/09/2013	
Fair Housing Marketing Plan	06/08/2022	
Anti-Discriminatory Harassment Policy	09/14/2022	
Community Room Use	01/09/2013	
Credit/Debit Card Policy	03/09/2016	
Criminal Offender Records Information (CORI) Policy	06/13/2012	
Equal Employment Opportunity Policy and Affirmative Action Plan		Policy adopted circa 1994. Board will review in FY 2024
Investment Policy	07/01/1994	
Language Access Plan	02/09/2022	
Maintenance and Other Charges	04/08/2009	
Parking	07/11/2018	
Pet Policy	01/09/2019	
Reasonable Accommodations Policy	10/13/2021	

<b>Policy</b>	<b>Last Ratified by Board Vote</b>	<b>Notes</b>
Sexual Harassment Policy	06/13/2014	
Smoking Policy	07/09/2014	
Travel Policy	08/08/2012	Included in Personnel Policy
Other – Define in the ‘Notes’ column	11/09/2011	Air Conditioner Policy
Other – Define in the ‘Notes’ column	02/13/2013	Disposition Policy
Other – Define in the ‘Notes’ column	06/14/2017	Yard Policy - Family Housing
Other – Define in the ‘Notes’ column	01/09/2013	Yard Policy - Chapter 667 Housing
Other – Define in the ‘Notes’ column	05/11/2005	Satellite Dish Policy
Other – Define in the ‘Notes’ column	12/10/2008	No Trespass Policy

\* 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**

Gloucester 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.

<b>Description</b>	<b>Reason</b>	<b>Date Waiver Approved by DHCD</b>	<b>Date Expired</b>
Security Deposit Waiver	Allow GHA to collect security deposits from all tenants.	01/29/1998	06/30/2025

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.

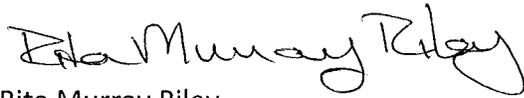
- McPherson Local Tenants Organization (LTO) Letter
- Lincoln Park Local Tenants Organization (LTO) Letter
- Public Comments and LHA Responses
- Cover sheet for tenant satisfaction surveys
- Tenant Satisfaction Survey 667 Program
- Performance Management Review

David Houlden, Executive Director  
Gloucester Housing Authority  
259 Washington Street  
Gloucester, MA 01930

Dear Mr. Houlden

Thank you for meeting with us to review the proposed DHCD Annual Plan for FY 2023. After careful consideration, the McPherson Park Tenant Association has decided to support the DHCD Annual Plan submission for the fiscal year ending June 30, 2024 (FY23)

Sincerely,

A handwritten signature in black ink that reads "Rita Murray Riley". The signature is written in a cursive style with a large, looping "R" and "y".

Rita Murray Riley  
MPTA President

# LINCOLN PARK TENANT ASSOCIATION

February 16, 2023

David Houlden, Executive Director  
Gloucester Housing Authority  
259 Washington Street  
Gloucester, MA 01930

Dear Mr. Houlden

Thank you for meeting with us to review the proposed DHCD Annual Plan for FY 2023. After careful consideration, the Lincoln Park Tenant Association (LPTA) has decided to support the DHCD Annual Plan submission for the fiscal year ending June 30, 2024 (FY23)

Sincerely,



Reuben James  
LPTA President

2023 FEB 16 PM 1:45

The Public Hearing Notice was posted on the GHA website, posted as a Public Meeting with the City of Gloucester Clerk's Office, posted at each State-aided Housing Development, and provided to the Local Tenant Organization (LTO) on January 17, 2023.

In attendance were Board Commissioners Scott B. Duffany, Chair; Andrew C. Nickas, Vice-Chair; Jennifer-Lee Levitz Aronson, Treasurer; Barbara Snare, Asst. Treasurer and Irene Frontiero, Member.

Also in attendance were David S. Houlden, Executive Director and Sharon Fortado, Executive Assistant.

No other individuals attended the hearing.

The Chair opened the Public Hearing at 4:30 p.m. The Executive Director then provided an overview of the Plan. This is the second year of the Annual Plan process which is required by the Housing Reform Act of 2014 to provide greater transparency of housing authorities. The plan covers the following elements for our State-aided Programs:

1. Proposed Capital Improvement Plan (5-year)
2. Proposed Maintenance and Repair Plan
3. Current Operating Budget
4. Responses to the Performance Management Review (PMR) findings
5. List of the 26 Board-approved housing authority policies
6. List of the one waiver from governing regulations of the Department of Housing and Community Development (DHCD) to collect Security Deposits.
7. Other elements

The Director provided an overview of the proposed capital projects and discussed the GHA's responses to PMR comments concerning the GHA's Chapter 200 Tenant's Accounts Receivables and CHAMP data entry errors. It was noted that DHCD would be revising Capital Plan Benchmarks this year.

opposition to the plan or offered any comments.

After some questions clarifying some boilerplate elements of the plan, members of the Board spoke in favor of the plan and commended the Executive Director and staff for all their efforts developing the plan.

The Chair then closed the Public Hearing at 4:45 p.m.

Respectfully,

  
\_\_\_\_\_  
David S. Houlden, Executive Director/Secretary Ex-officio

## **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.

# Gloucester 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 **Gloucester Housing Authority**, surveys were sent to a total of **200** Gloucester housing units (Chapter 667); **95** surveys were completed.

This report provides some information about how the residents from the **Gloucester 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 Northeastern 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:

	Gloucester Housing Authority	Entire State
Felt they were usually or always treated with courtesy and respect when they contacted management.....	88%	87%
Knew the Executive Director held a meeting with residents.....	85%	54%

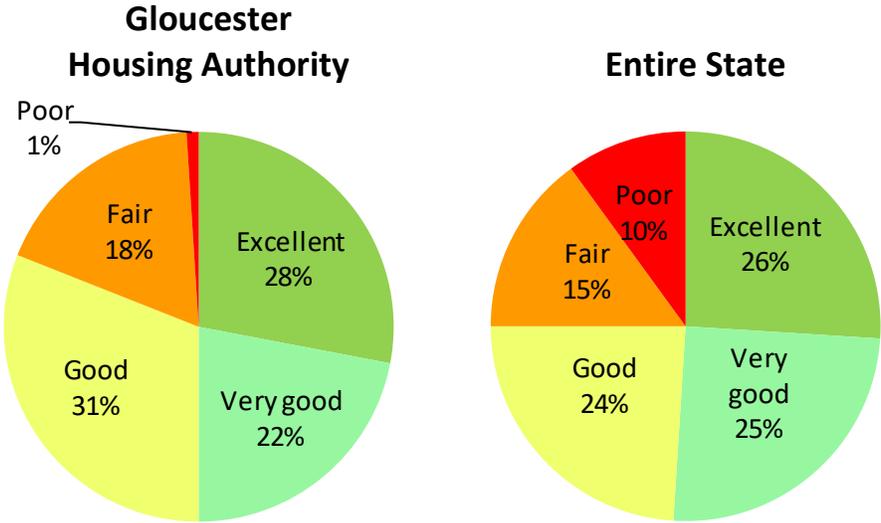
# Maintenance and Repair

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

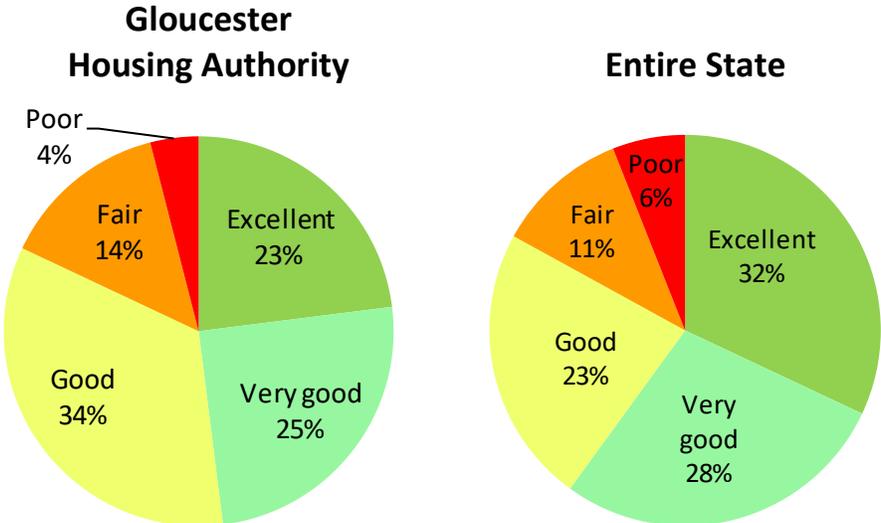
	Gloucester Housing Authority	Entire State
Felt they were treated with courtesy and respect when they contacted maintenance.....	94%	89%
Were contacted by the Housing Authority before entering their apartment.....	90%	92%

- 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:**



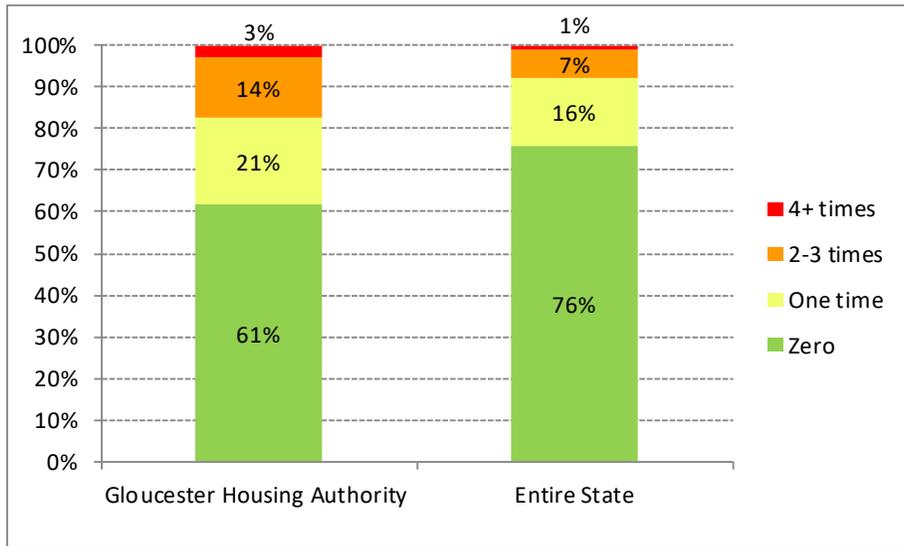
- **Heating and Water Problems:** Over a half of respondents had a problem with their heating and about two thirds had a plumbing problem in the last 12 months.

	Gloucester Housing Authority	Entire State
Had any heating problem.....	55%	40%
Had any water problem.....	67%	57%

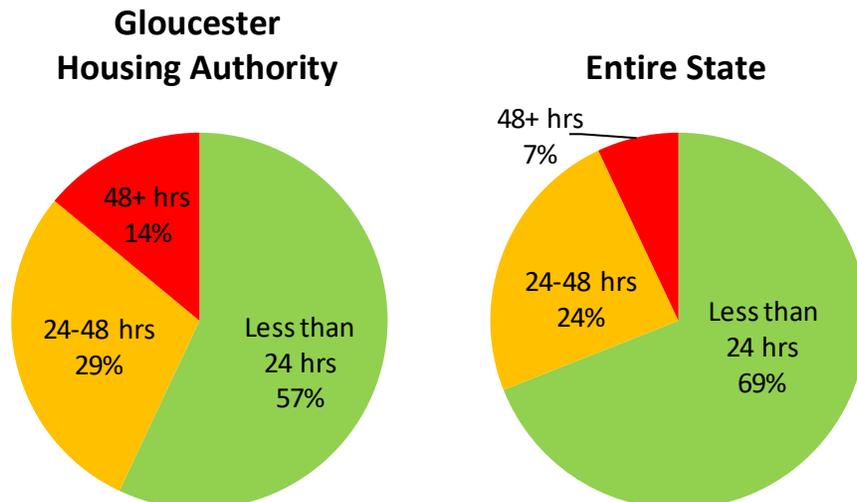
- **Heating Problems**

**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.



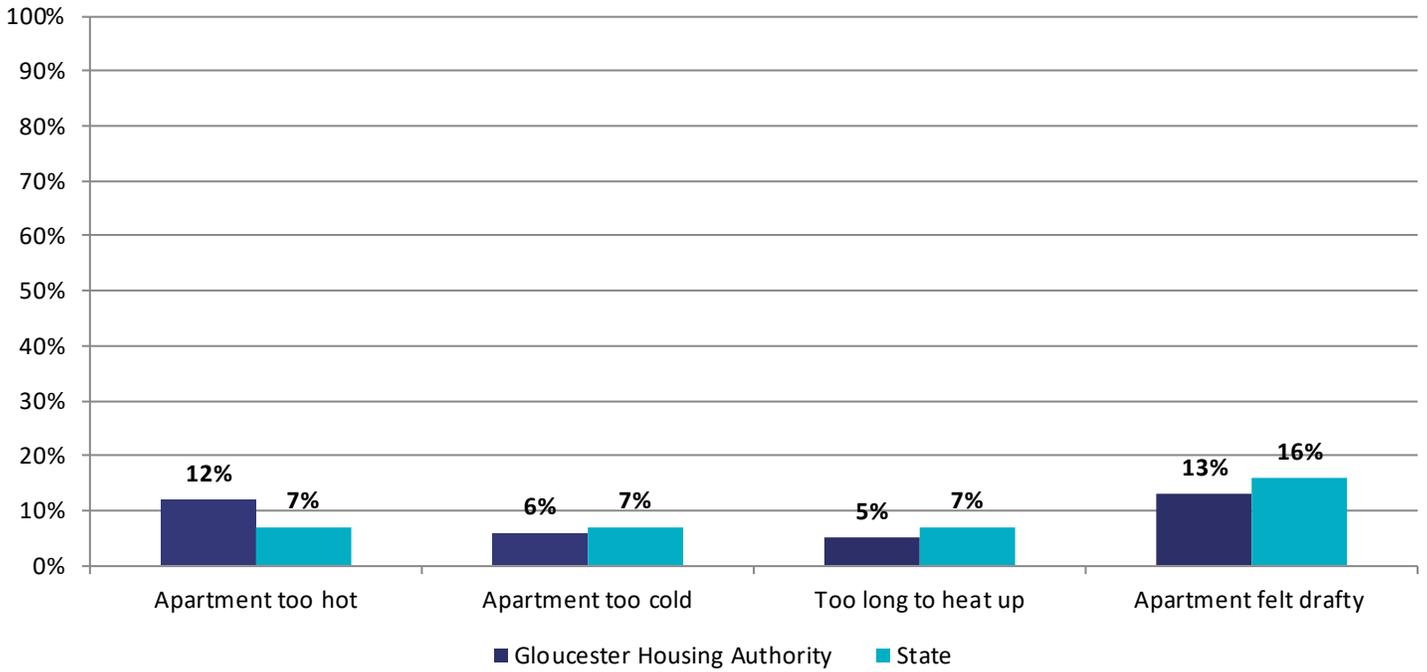
**How long did it usually take for heat to come back on?** For those respondents who reported completely losing heat, we asked how long it usually took for the heat to come back on – less than 24 hours, 24 - 48 hours, or more than 48 hours.



- **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.



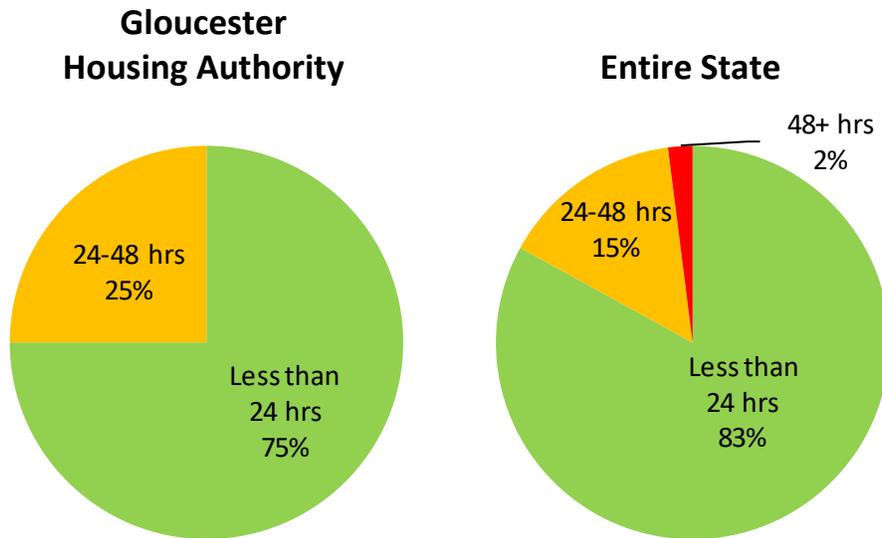
- **Water or Plumbing Problems**

**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.



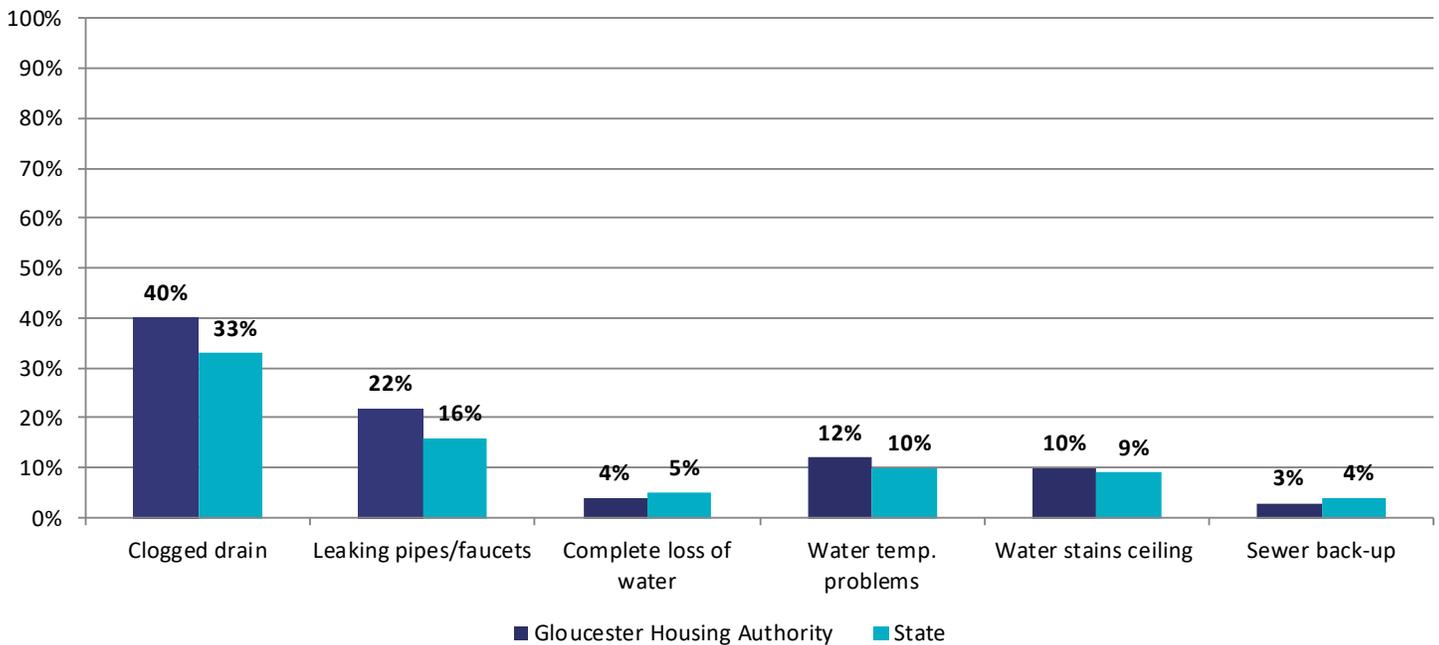
**How long did it usually take for hot water to come back on?** For those respondents who reported not having hot water in their apartment, we asked how long it usually took for hot water to come back on – less than 24 hours, 24 - 48 hours, or more than 48 hours.



• **Other Water or Plumbing Problems**

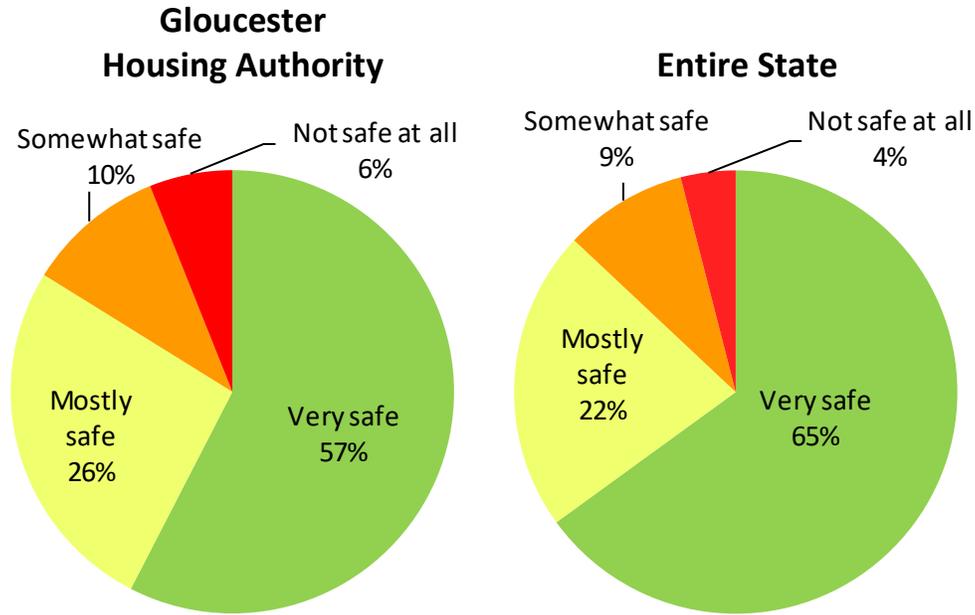
**In the last 12 months did residents have other water or plumbing problems?**

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

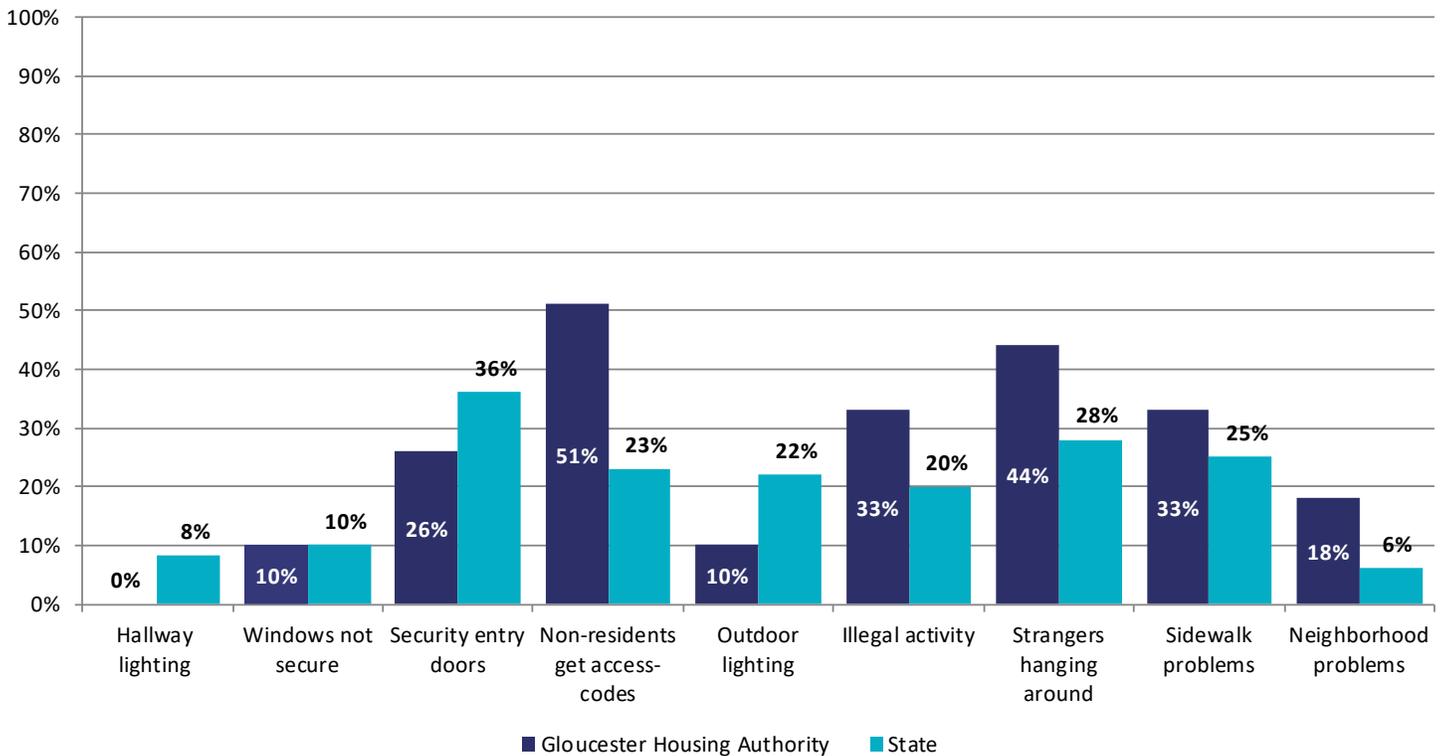


# Safety

**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.

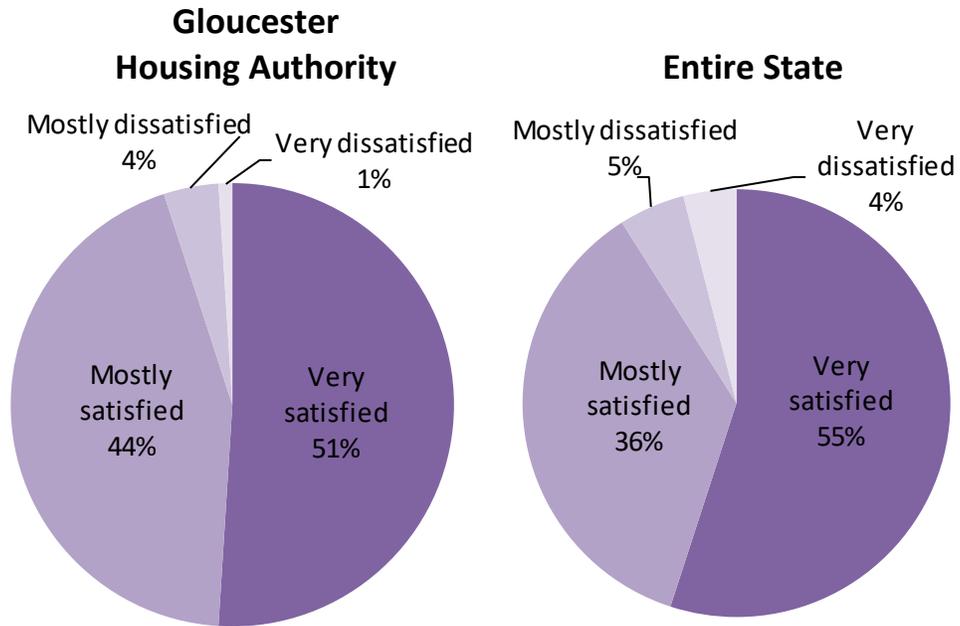


**Reasons why respondents felt unsafe in their development:** Respondents were asked why they felt unsafe in their development. This chart shows what specific concerns respondents mentioned.



# 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”.



**GLOUCESTER**  
**HOUSING AUTHORITY**  
**Performance Management Review**  
**(PMR) Report**  
**Fiscal Year End 06/30/2022**

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

# Performance Management Review

<b>DEPARTMENT OF HOUSING AND COMMUNITY DEVELOPMENT (DHCD)</b> <b>PMR Desk Audit Ratings Summary Official Published PMR Record</b> For a detailed report of the Performance Management Review (PMR), please contact the Local Housing Authority				
Housing Authority	Gloucester Housing Authority			
Fiscal Year Ending	06/30/2022			
Housing Management Specialist	Melanie Loveland-Hale			
Facilities Management Specialist	Bob Arsenault			
Criteria	Score/Rating			
	Management			
Occupancy Rate	c.667	c.705	c.200	Cumulative
	No Findings	Not Applicable	No Findings	No Findings
Tenant Accounts Receivable (TAR)	c.667	c.705	c.200	Cumulative
	No Findings	Not Applicable	Operational Guidance	No Findings
Board Member Training	No Findings			
Certifications and Reporting Submissions	No Findings			
Annual Plan	No Findings			
	Financial			
Adjusted Net Income	No Findings			
Operating Reserves	No Findings			
	Capital			
Capital Spending	Operational Guidance			

**Occupancy**

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

- Enter vacancies into system at least monthly and ensure that there are no duplicates. Reach out to HMS if accidental duplicates occur.
- Use online vacancy system, see user guide if need help. All vacancies must be reported; and quarterly certifications must be completed certifying all data is in system. Request waivers when applicable.
- Follow tenant selection best practices to improve vacancy turnover (pulling lists in CHAMP as soon as vacancy occurs and previewing list to prescreen in advance of vacancies as needed).
- Include unit turnovers in capital improvement plan.
- Engage in a management agreement or contract with private firms to help with heavy unit turnover.
- Review turnovers with staff weekly or biweekly to monitor status of vacant units.
- Develop plan for updating units with long term occupancy to limit turn over time at vacancy; family units may need consistent attentions o when lease up, condition is not affecting vacancy turnover time.
- Ensure that yearly inspection findings are addressed and address tenant damage/lease violations.
- Other:**

**Tenant Accounts Receivable (TAR)**

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

- Create or update rent collection policy and procedures and submit to DHCD for review, with supporting Board vote.
- Adhere to your rent collection policy and lease, i.e. sending notices, reminder letters, 14 day notice to quit, 30 day notice etc. Send notices to tenants early and frequently.
- Increase ways to accept rent payment, i.e. check scanners, lock boxes, electronic debit, autopay, etc.
- Report to credit bureau when resident has vacated unit with past due rent balance.
- Consider using small claims court (<https://www.mass.gov/info-details/massachusetts-law-about-small-claims>)
- Create written repayment agreements, either in house or court ordered, and ensure they are adhered to.
- Evaluate vacated balances to better understand what is collectible and what is unlikely to be collected. Don't allow tenant balances to build-up before doing lease enforcement. Review aged receivables report regularly.
- Set reasonable thresholds for commencing legal action.
- Ensure proper documentation of past due balances and collection efforts with tenants.
- Other:**



## Board Member Training

Rating:

No Findings

- Ensure you update the board attendance application with the most recent board members, and their term dates.
  
- Ensure each board member has a unique email for the board member training.
- Provide computer guidance as needed to help board members complete the training.
- Other:**

## Certifications and Reporting Submissions

**Rating:** No Findings

- Submit all four quarterly vacancy certifications by the end of the month following the quarter end.
- Submit all four quarters of Tenants Accounts Receivables (TAR) application within 60 days of quarter end.
- Submit all four quarterly operating statements within 60 days of the quarter end.
- Schedule board meetings well in advance. Consider scheduling a backup date to ensure you are able to have your board vote/approval in time to meet reporting deadlines.
- Set a recurring appointment in your email calendar for help remembering reporting dates and deadlines.
- Other:**

## Annual Plan Submission

**Rating:** No Findings

- Annual Plan submitted up to 45 days late
- Annual Plan not submitted/submitted more than 45 days late
- Other:**

## Adjusted Net Income/Revenue

**Rating:** No Findings

**Revenue:**

- Update and adhere to rent collection policy
- Update marketing plan
- Update internal policies related to vacant unit turnover
- Review rent roll to identify outstanding rents and/or patterns of rent delinquency.
- Review operating statements to identify trends in revenue collection such as LHA-wide or development-centered rent issues.
- Follow tenant selection best practices to improve vacancy turnover (pulling lists in CHAMP as soon as vacancy occurs and previewing list to prescreen in advance of vacancies as needed)
- Set up repayment agreements with tenants as soon as tenant becomes in arrears; do not let large balances accrue.
- Make it easier for tenants to pay rent. For example, consider online payments, lockboxes for night time drop-off or extended office hours
- Review budget reports with both fee accountant/financial staff and your board to stay on top of revenue trends.
- Ensure rent determinations are completed regularly and are in adherence with DHCD policy

**Expense:**

*Salaries*

- Monitor expenses throughout the year; over or underspending in certain budget lines, can be fixed by reducing or increasing other lines to ensure you stay within your ANUEL.
- Consider a reorganization of staff time/roles and improve processes.
- 
- Hire temporary workers or offer overtime to current employees to pick up the workload of staff out on leave.
- Ensure your budget is in compliance with state and federal requirements regarding allocations.

*Legal*

- Review and if needed revise tenant selection process, rent collection process and notice to quit process to reduce evictions/legal costs.
- Start tracking or better estimate eviction costs based on historical averages throughout the year. If legal costs for evictions are running higher than expected, reduce other budget lines to ensure you stay within your ANUEL.
- If you qualify, use DHCD's regional attorney program.

*Utilities*

-

- Use online resources such as WegoWise, MassEnergyInsight or software provided by your utility company to track and monitor utility usage. Review the usage monthly to look for unusual expenditures.
- Weatherize units to improve insulation. Reach out to maintenance director or DHCD staff for more information.
- Request a referral from your HMS to DHCD's sustainability coordinator if you are interested in saving money through the installation of low-flow toilets, showerheads, LED lights or other cost-savings, energy-efficient measures. DHCD frequently has incentive programs that pay for the procurement and installation of energy and water saving appliances and tools at your LHA.
- Ensure that you have an air conditioner policy that precludes a/c being in windows out of season/enforce policy if already in place.

*Maintenance*

- Develop or update your preventive maintenance, deferred maintenance and routine maintenance plans and review monthly with maintenance staff.
- Develop or update your procurement and purchasing policies and review with staff.
- Develop a system to schedule and track preventive maintenance, reach out to your facilities management specialist for assistance.
- If contractor costs are high, see if your current maintenance team can complete the work or if it is possible to contract with a tradesman.
- Consider bulk purchasing for supplies and shop around for the best deals.
- Consider investing (through purchase or maintenance) in equipment that may reduce hours spent on maintenance (such as a snow blower to reduce time shoveling).
- Other: Please see Public Housing Notice 2018-08 for due dates.**



## Operating Reserve

**Rating:** No Findings

- Please refer to PHN 2018-04 and current budget guidelines for information on operating reserve
- An LHA may spend down to 35% of maximum reserve level without consulting DHCD, but the LHA must budget these expenses in the correct line items of their annual operating budget. If the expense occurred after DHCD approval of the annual operating budget, the LHA should submit a budget revision with these expenditures.
- Any expenditures from the operating reserve that will result in a projected operating reserve of less than 35% of maximum reserve level, requires *prior written approval* from DHCD, *unless the expenses are to resolve health and safety issues*.
- Each LHA must maintain a projected operating reserve of 20% of maximum reserve level, which *remains the minimum operating reserve level for all LHAs*.
- Other:**

## Capital Spending

**Rating:** Operational Guidance

- Spent 50-79% of the past three years of Formula Funding (FF)
- Spent less than 50% of the past three years of Formula Funding (FF)
- 
- Other:**

**DEPARTMENT OF HOUSING AND COMMUNITY DEVELOPMENT (DHCD)  
CHAMP PMR Report**

**For any questions on your CHAMP PMR Report, please contact your HMS.**

Housing Authority	Gloucester Housing Authority
Fiscal Year End Date	June 30, 2022
Dates	July 1, 2021 to June 30, 2022
HMS Name	Melanie Loveland-Hale

**Criteria 1: Paper applications available, received and entered into CHAMP**

Criteria 1A: Paper Application Availability

Rating: No Findings

Recommendations: 1. No recommendations.

Criteria 1B: Paper Application Timestamps

Rating: No Findings

Recommendations: 1. No recommendations.

Criteria 1C: Paper Application Entry

Rating: No Findings

Recommendations: 1. No recommendations.

**Criteria 2: All vacancies are reported and all occupied units filled with CHAMP**

Criteria 2A: Vacancies Reported and Recorded on Time

Rating: Corrective Action

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

Criteria 2B: Vacancies Filled Using CHAMP

Rating: Corrective Action

Recommendations: 1. Ensure that all unit offer data is correctly entered into the DHCD Housing Apps Vacancy Reporting System (Including Application ID, List Pull ID, Applicant Priority/Preference, and Lease Start date)  
2. Prioritize entering Admin Transfers accurately into the Vacancy Reporting System. This includes selecting "Admin" as the priority for the applicant being transferred.  
3. Ensure that all offers are made using CHAMP and only after a list pull has been moved to the offer stage.

**DEPARTMENT OF HOUSING AND COMMUNITY DEVELOPMENT (DHCD)  
PMR Physical Condition Report**

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

LHA Name	GLOUCESTER HOUSING AUTHORITY
FYE	06/30/2022
HMS Name	Melanie Loveland Hale
FMS Name	Bob Arsenault

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

Rating: No Findings

Recommendations: 1. Contact your FMS for technical assistance

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

Rating: No Findings

Recommendations: 1. Contact your FMS for technical assistance

Criteria 3: Unit Inspection Reports accurately reflect necessary repairs

Rating: No Findings

Recommendations: 1. No recommendations

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

Rating: No Findings

Recommendations: 1. No recommendations

Criteria 5: Vacancy Turnover Work Orders accurately reflect necessary repairs

Rating: No Findings

Recommendations: 1. No recommendations

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

Rating: No Findings

Recommendations: 1. No recommendations

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

Rating: No Findings

Recommendations: 1. No recommendations

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

Rating: No Findings

Recommendations: 1. No recommendations

### **Health & Safety Deficiencies**

Inspection reports were provided to the LHA at the time of the DHCD site visit. There were no Health and Safety deficiencies identified during the PMR Inspection.