

Swampscott Housing Authority Annual Plan for Fiscal Year 2023 For State-Aided Public Housing

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

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

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

The Swampscott Housing Authority's Annual Plan for their 2023 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. LTO Letter
 - b. Public Comments
 - c. Cover sheet for tenant satisfaction surveys
 - d. Tenant Satisfaction Survey 667 Program
 - e. Performance Management Review

State-Aided Public Housing Developments

The following table identifies the state-aided public housing units with developments of more than 8 units listed separately. Units in developments of 8 or fewer units are aggregated as noted. Units that the LHA provides to assist clients of the Department of Mental Health (DMH), the Department of Developmental Services (DDS), or other agencies are also aggregated separately.

Dev No	Type	Development Name	Num Bldgs	Year Built	Dwelling Units
667-02	Elderly	DOHERTY CIRCLE 667-02	6	1969	44
667-01	Elderly	DUNCAN TERRACE 667-01	6	1960	40
200-01	Family	M. KELLY VET and FAMILY HOUSING 200-01	9	1949	36
	Other	Special Occupancy units	1		2
Total			22		122

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.

Swampscott Housing Authority manages 7 MRVP vouchers.

LHA Central Office

Swampscott Housing Authority
6 Duncan Terrace, Swampscott, MA, 01907
Irma Chez, Executive Director
Phone: 781-593-5516
Email: swampscott.authority@verizon.net

LHA Board of Commissioners

	<u>Role</u>	<u>Category</u>	<u>From</u>	<u>To</u>
Richard Callahan	Chair		05/01/2018	04/30/2023
Tara Cassidy-Driscoll	Treasurer		06/01/2021	06/30/2026
Catherine Estevenena	Vice-Chair		05/01/2019	04/30/2024
Cynthia Tennant	Member		05/01/2021	05/30/2026

Local Tenant Organizations

	<u>Date of Recognition by LHA</u>	<u>Date LHA Reviewed Draft AP with LTO</u>
Swampscott Senior Tenants Associat	08/02/2021	06/13/2022

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.	04/27/2022
B.	Advertise the public hearing in public postings.	04/27/2022
C.	Notify all LTO's and RAB, if there is one, of the hearing and provide access to the Proposed Annual Plan.	04/27/2022
D.	Post draft AP for tenant and public viewing.	04/27/2022
E.	Hold quarterly meeting with LTO or RAB to review the draft AP. (Must occur before the LHA Board reviews the Annual Plan.)	06/13/2022
F.	Annual Plan Hearing. Hosted by the LHA Board, with a quorum of members present. (For Boston, the Administrator will host the hearing.)	06/14/2022
G.	Executive Director presents the Annual Plan to the Board.	06/14/2022
H.	Board votes to approve the AP. (For Boston Housing Authority, the Administrator approves and submits the AP.)	06/14/2022

Certification

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

I, Irma Chez, Executive Director of the Swampscott Housing Authority, certify on behalf of the Housing Authority that I have conducted an annual review of all Swampscott 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 Swampscott 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, Irma Chez, Executive Director of the Swampscott 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: 07/19/2022

The Department of Housing and Community Development (DHCD) completed its review of this Annual Plan (AP) on July 26, 2022. 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.

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)	\$447,819.58		Total of all FF awards minus prior FF spending
LHA Emergency Reserve	\$44,781.96		Amount to reserve for emergencies
Net FF Funds (First 3 Years of the CIP)	\$403,037.62	\$452,197.40	Funds to plan & amount actually planned in the first 3 years of the CIP
ADA Set-aside	\$5,590.67	\$4,656.00	Accessibility projects
DMH Set-aside	\$0.00	\$0.00	Dept. of Mental Health facility
DDS Set-aside	\$13,869.28	\$12,874.82	Dept. of Developmental Services facility
Unrestricted Formula Funding (FF)	\$383,577.68	\$434,666.58	Funds awarded by DHCD to be used on projects selected by the LHA and approved by DHCD.
Special DHCD Funding	\$39,744.17	\$20,144.17	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	\$0.00	\$0.00	Funds other than those in the above categories. See explanation below.
Total funds and planned spending	\$442,781.80	\$472,341.58	Total of all anticipated funding available for planned projects and the total of planned spending.

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)**Regional Capital Assistance Team**

Swampscott Housing Authority participates in the Regional Capital Assistance Team (RCAT) program and project implementation responsibilities are as follows:

- o For projects with construction cost under \$10,000, the LHA has the sole responsibility to initiate, implement and manage the project. RCAT offers technical assistance upon request.
- o For projects with construction cost between \$10,000 and \$100,000 the RCAT will have lead responsibility to initiate, implement and manage the project with both DHCD and LHA involvement and oversight throughout the process. For projects in this range, the LHA will work with the RCAT Project Manager who will contact the LHA to initiate projects.
- o For projects with construction cost over \$100,000, or projects below that threshold that are complex or have a subsequent phase that exceeds \$100,000 construction cost, DHCD will take the lead and draft a WO or RFS to hire a designer to prepare plans and specs. RCAT will not be involved in the implementation of projects in this range and the LHA will continue to work directly with the DHCD Project Manager and DHCD design staff.

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 2022	fy2023 Planned	fy2024	fy2025	fy2026	fy2027
291021	2008 FF Master CFA	M. KELLY VET and FAMILY HOUSING 200-01	\$1,200	\$1,200	\$0	\$0	\$0	\$0	\$0	\$0
291044	FF: Replace Carpeting 1st Floor - RP - GD	RYAN PLACE 689-01	\$4,400	\$1,975	\$0	\$2,425	\$0	\$0	\$0	\$0
291047	FF: Parking Space Re-stripe ADA Spot	RYAN PLACE 689-01	\$2,509	\$0	\$0	\$2,509	\$0	\$0	\$0	\$0
291048	FF: 667-02 Window Replacement	DOHERTY CIRCLE 667-02	\$265,239	\$251,139	\$14,100	\$0	\$0	\$0	\$0	\$0
291050	FF: WATER HEATER REPLACEMENT	RYAN PLACE 689-01	\$10,589	\$0	\$0	\$10,589	\$0	\$0	\$0	\$0
291051	FF: Repair ADA Exit Ramp	RYAN PLACE 689-01	\$5,863	\$0	\$0	\$5,863	\$0	\$0	\$0	\$0
291054	Re-stripe Parking Lot	DUNCAN TERRACE 667-01	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
291056	Replace fuse panels	DUNCAN TERRACE 667-01	\$155,161	\$137,080	\$4,330	\$0	\$0	\$0	\$0	\$0
291057	ADA Door Upgrade	RYAN PLACE 689-01	\$9,200	\$0	\$9,200	\$0	\$0	\$0	\$0	\$0
291058	Structural Monitoring	DOHERTY CIRCLE 667-02	\$8,000	\$1,074	\$6,927	\$0	\$0	\$0	\$0	\$0
291062	Roof Replacement FAMILY	M. KELLY VET and FAMILY HOUSING 200-01	\$249,956	\$248,956	\$1,000	\$0	\$0	\$0	\$0	\$0
291064	Porch Replacement	DUNCAN TERRACE 667-01	\$180,077	\$20,806	\$15,565	\$160,263	\$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 2022	fy2023 Planned	fy2024	fy2025	fy2026	fy2027
291065	Emergency Tree Removal	M. KELLY VET and FAMILY HOUSING 200-01	\$3,781	\$0	\$3,781	\$0	\$0	\$0	\$0	\$0
291066	SUST-R: SHMCAP Flood Elevation Survey	DUNCAN TERRACE 667-01	\$8,000	\$0	\$0	\$0	\$0	\$0	\$0	\$0
291067	CR Request Handicap Ramp	DUNCAN TERRACE 667-01	\$6,806	\$2,495	\$4,311	\$0	\$0	\$0	\$0	\$0
•	Window Replacement / Sill Repairs	M. KELLY VET and FAMILY HOUSING 200-01	\$497,925	\$0	\$0	\$0	\$0	\$0	\$0	\$198,870
•	Storm Door Replacement	DUNCAN TERRACE 667-01	\$82,431	\$0	\$0	\$0	\$0	\$0	\$46,108	\$36,324
•	Fire Alarm Upgrades	DUNCAN TERRACE 667-01	\$227,024	\$0	\$0	\$101,774	\$125,251	\$0	\$0	\$0
•	ADA Office Ramp	DUNCAN TERRACE 667-01	\$43,525	\$0	\$0	\$43,525	\$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	Sustain- ability	Special Awards	CDBG	CPA	Operating Reserve	Other Funds
291048	FF: 667-02 Window Replacement	E-Bidding/E-Hostin g rebate for #291048	\$0	\$35,998	\$0	\$0	\$0	\$0	\$0	\$0
291056	Replace fuse panels	asbestos removal	\$0	\$28,500	\$0	\$0	\$0	\$0	\$0	\$0
291066	SUST-R: SHMCAP Flood Elevation Survey	SHMCAP Flooding Survey	\$0	\$0	\$8,000	\$0	\$0	\$0	\$0	\$0
291067	CR Request Handicap Ramp	HP ramp	\$0	\$6,806	\$0	\$0	\$0	\$0	\$0	\$0
•	Window Replacement / Sill Repairs		\$0	\$0	\$0	\$0	\$0	\$60,000	\$0	\$0

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.

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

- The TDC for a proposed project exceeds the Cap Share for a single year and it doesn't make sense to spread it
- Other

Large fire alarm project was added and doesn't make sense to spread it over multiple year due to H&S concerns.

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.

Swampscott Housing Authority has not requested additional funding.

3. Overall goals of the Housing Authority's CIP

SHA 's goal this years CIP is to address H&S concern . The addition of a Fire alarm upgrade and a ADA ramp/trip hazard demonstrates the focus on H&S. With the continued pursuit of overall preventive maintenance and overall preparedness.

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:

Addition of new handicap ramp project at the 667-1 property a fire alarm upgrade project was created at the 667-1.

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 12/20/2021.

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 06/14/2021.

8. Project priorities

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

9. High priority deficiencies

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

10. Accessibility

We have identified the following accessibility deficiencies in our portfolio:
Handicap ramp at the 667-1 property (office).

We have incorporated the following projects in our CIP to address accessibility deficiencies:
A new ramp project has been created and is this years CIP.

11. Special needs development

Swampscott 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 09/16/2021.

12. Energy and water consumption

Our 12 most recent monthly energy reports are for months 1/2021 to 12/2021.

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

	Electric PUM > Threshold	Gas PUM > Threshold	Oil PUM > Threshold	Water PUM > Threshold
Threshold PUM:	\$100	\$80	\$50	\$60
	667-02			200-01

Electric heat is hard to control and monitor. Family units use more water due to on site washing machines.

13. Energy or water saving initiatives

Swampscott 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.

AP-2023-Swampscott Housing Author-00611 had an energy audit under the Low-Income Energy Affordability Network (LEAN) program on 06/21/2021

14. Vacancy rate

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

5% c. 667 (DHCD Goal 2%)

0% c. 200 (DHCD Goal 2%)

0% c. 705 (DHCD Goal 2%)

Swampscott Housing Authority will address the excess vacancies in the following manner:
SHA has had a recent surge of vacancies and the staff will be handling them.

CIP Approval For Swampscott Housing Authority for FY 2023

Formula Funding Capital Improvement Plan (CIP), WorkPlan 5001

7/22/2022

Congratulations! The CIP-2023 submitted by Swampscott Housing Authority is approved, subject to the following conditions:

- Your plan includes significantly more spending in fiscal year 2023 than your planning cap share for that year. We've approved project 291-667-01-S01-22-453 ADA Office Ramp, while we propose to defer project number 291-667-01-0-22-442 Fire Alarm Upgrades by 1 year. If you feel this project cannot be deferred, please provide a written description of the conditions to your DHCD Project Manager.
- Your LHA participates in the Regional Capital Assistance Team (RCAT) program and project implementation responsibilities are as follows:
 - o For projects with construction cost under \$10,000, the LHA has the sole responsibility to initiate, implement and manage the project. RCAT will offer technical assistance upon your request. DHCD recently revised the Small Project Guide to address statutory and policy changes. It is available on the web at <http://www.mass.gov/hed/docs/dhcd/ph/small-projects/dhcdsmallprojectsguide.pdf>. The Guide contains step-by-step instructions to help you make sure that your projects are done efficiently, cost-effectively and according to applicable statutes, rules and regulations. Please be sure to complete projects in accordance with the requirements and procedures described in the Guide.
 - o For projects with construction cost between \$10,000 and \$100,000 the RCAT will have lead responsibility to initiate, implement and manage the project with LHA involvement and oversight throughout the process. If you have projects in this range, you will be working with your RCAT Project Manager who will contact you to initiate your project(s). Please note that DHCD has increased the threshold for independent implementation to \$100,000 construction cost in response to the passage of Chapter 218. Projects with an estimated Construction cost greater than \$25,000 still require soliciting the professional services of an architect or engineer. (See DHCD Small Project guide "When to Hire a Designer" (<http://www.mass.gov/hed/docs/dhcd/ph/small-projects/dhcdsmallprojectsguide.pdf>)). The RCAT may be able to provide "In House" specifications with an estimated construction cost greater than \$25,000, but requires the approval of DHCD before proceeding.
 - o For projects with construction cost over \$100,000, or projects below that threshold that are complex or have a subsequent phase that exceeds \$100,000 construction cost, DHCD will take the lead and draft a WO or RFS to hire a designer to prepare plans and specs. At this point, RCAT will not be involved in the implementation of projects in this range and you will continue to work directly with your DHCD Project Manager and DHCD design staff.

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

CPS Number	FISH #	Project Name	TDC Amount	Primary PM	Project Year
291-667-01-S01-22-453	291068	ADA Office Ramp	\$43,525.00	RCAT	2023

Construction cost for FY 2023 projects is to be incurred by June 30, 2023. Construction cost for FY 2024 projects is to be incurred between July 1, 2023 and June 30, 2024. Pre-construction costs may be incurred in FY 2023.

There are no large or complex projects to be managed by DHCD.

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 Avalon McLaren at (617) 573-1166 with any questions.

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

This document was created on 7/22/2022 by Avalon McLaren, 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.**

Additional Remarks by the Swampscott Housing Authority

PHA-Web

Emergency Request System

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

METHOD	CONTACT INFO.	TIMES
Call Answering Service	781-593-5516	After hours 24/7
Call LHA at Phone Number	781-593-5516	Mon -Friday 8:30 AM to 4:00 PM

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 Swampscott Housing Authority main office.

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

Normal Maintenance Request Process

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

METHOD	CONTACT INFO.	TIMES
Text Phone Number		
Call Answering Service	781-593-5516	After hours 24/7
Call Housing Authority Office	781-593-5516	Mon -Friday 8:30 AM to 4:00 PM
Submit Online at Website		
Email to Following Email	swampscott.authority@veri	
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: PHAWeb

Work order classification used:

Emergency	✓
Vacancy	✓
Preventative Maintenance	✓
Routine	✓
Inspections	✓
Tenant Requests	✓

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

C. Our work order process includes the following steps:

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

Maintenance Plan Narrative

Following are Swampscott 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 new system in place (PHA-Web) has certainly made a difference in terms of work order process time and priority status. No finding on our last PMR.

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

We have in place a new and upgraded system. Our maintenance staff receives work orders via email directly on their phones. Saving time for the tenants and our staff members.

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

Continue to utilize the new system, as it is working perfectly.

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	\$189,925.00	\$44,718.00
Last Fiscal Year Actual Spending	\$177,617.00	\$57,695.00
Current Fiscal Year Budget	\$220,375.00	\$43,777.00

E. Unit Turnover Summary

# Turnovers Last Fiscal Year	9
Average time from date vacated to make Unit "Maintenance Ready"	80 days
Average time from date vacated to lease up of unit	191 days

Attachments

These items have been prepared by the Swampscott 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.

Swampscott Housing Authority Work Order Complete/Incomplete Report

Program: , Project: All, Created From: 7/1/2021, Created Through: 4/5/2022, Status: Complete, Status Included: Preventive, Employee: All, Completed From: 7/1/2021, Completed Through: 4/5/2022

Work Order By Priority					
Priority	Count	Incomplete	Complete	Tot. Days	Avg. Days
Preventive	6	0	6	16.00	2.67
Totals:	6	0	6	16.00	2.67

Work Order By Employee					
Assigned Employee	Count	Incomplete	Complete	Tot. Days	Avg. Days
John Fernandes	1	0	1	1.00	1.00
Peter Grocki	2	0	2	12.00	6.00
Phil Shire	3	0	3	3.00	1.00
Totals:	6	0	6	16.00	2.67

W/O #	Priority	Unit Address	Tenant Name	Created Date	Completed Date	Mat.	Labor	Actual	Billed
Program: MA State 667									
Project: 667-1 Duncan Terrace									
1373	Preventive			08/23/2021 08:00 AM	08/23/2021 10:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
2087	Preventive			01/27/2022 03:19 PM	01/27/2022 03:23 PM	\$0.00	\$0.00	\$0.00	\$0.00
2134	Preventive	36 Duncan Terrace Unit: 36	Christine Dixon	02/14/2022 11:37 AM	02/15/2022 12:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
667-1 Duncan Terrace		Incomplete: 0		Complete: 3		\$0.00	\$0.00	\$0.00	\$0.00
Project: 667-2 Doherty Circle									
2100	Preventive	51C Doherty Circle Unit: 51C	Isa Agalliu	01/31/2022 11:40 AM	02/11/2022 11:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
667-2 Doherty Circle		Incomplete: 0		Complete: 1		\$0.00	\$0.00	\$0.00	\$0.00
MA State 667		Incomplete: 0		Complete: 4		\$0.00	\$0.00	\$0.00	\$0.00
Program: MA State 200									
Project: 200-1 Margaret M. Kelly Community									
2086	Preventive			01/27/2022 03:18 PM	01/27/2022 03:21 PM	\$0.00	\$0.00	\$0.00	\$0.00
2154	Preventive	43 Cherry Street Unit: 43CS	Robin Mannion	02/22/2022 09:51 AM	02/22/2022 11:30 AM	\$0.00	\$0.00	\$0.00	\$0.00
200-1 Margaret M. Kelly Community		Incomplete: 0		Complete: 2		\$0.00	\$0.00	\$0.00	\$0.00
MA State 200		Incomplete: 0		Complete: 2		\$0.00	\$0.00	\$0.00	\$0.00
Grand Totals:		Incomplete: 0		Complete: 6		\$0.00	\$0.00	\$0.00	\$0.00

Swampscott Housing Authority

Work Order Complete/Incomplete Report

Program: , Project: All, Created From: 7/1/2021, Created Through: 4/5/2022, Status: Complete, Status Included: Routine, Employee: All, Completed From: 7/1/2021, Completed Through: 4/5/2022

Work Order By Priority					
Priority	Count	Incomplete	Complete	Tot. Days	Avg. Days
Routine	300	0	300	3,379.00	11.26
Totals:	300	0	300	3,379.00	11.26

Work Order By Employee					
Assigned Employee	Count	Incomplete	Complete	Tot. Days	Avg. Days
Florentino Rivera	33	0	33	370.00	11.21
John Fernandes	104	0	104	1,252.00	12.04
Peter Grocki	130	0	130	1,614.00	12.42
Phil Shire	33	0	33	143.00	4.33
Totals:	300	0	300	3,379.00	11.26

W/O #	Priority	Unit Address	Tenant Name	Created Date	Completed Date	Mat.	Labor	Actual	Billed
Program: MA State 667									
Project: 667-1 Duncan Terrace									
988	Routine	8 Duncan Terrace Unit: 8	Ann Marie Chamberlain	07/01/2021 08:43 AM	07/01/2021 03:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
1001	Routine	Building B		07/07/2021 10:23 AM	07/08/2021 10:29 AM	\$0.00	\$0.00	\$0.00	\$0.00
1002	Routine	46 Duncan Terrace Unit: 46	William Scanlan	07/07/2021 11:01 AM	07/08/2021 11:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1006	Routine	42 Duncan Terrace Unit: 42	Helen Mason	07/08/2021 12:32 PM	07/22/2021 03:31 PM	\$0.00	\$0.00	\$0.00	\$0.00
1010	Routine	30 Duncan Terrace Unit: 30	Joanne Rosen	07/12/2021 10:35 AM	07/12/2021 01:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
1012	Routine	48 Duncan Terrace Unit: 48	Maria Reyes	07/12/2021 12:08 PM	07/23/2021 09:23 AM	\$0.00	\$0.00	\$0.00	\$0.00
1017	Routine	30 Duncan Terrace Unit: 30	Joanne Rosen	07/14/2021 09:27 AM	07/15/2021 10:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1026	Routine			07/20/2021 09:38 AM	07/26/2021 12:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1029	Routine	24 Duncan Terrace Unit: 24	Maureen Morrison	07/22/2021 08:53 AM	07/22/2021 12:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
1030	Routine			07/22/2021 10:45 AM	07/27/2021 12:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1031	Routine	40 Duncan Terrace Unit: 40	Nancy Sosnowski	07/22/2021 11:02 AM	07/22/2021 02:02 PM	\$0.00	\$0.00	\$0.00	\$0.00
1032	Routine			07/26/2021 08:58 AM	07/27/2021 12:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1040	Routine	40 Duncan Terrace Unit: 40	Nancy Sosnowski	08/02/2021 08:50 AM	08/03/2021 12:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1041	Routine			08/02/2021 09:02 AM	08/04/2021 12:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1042	Routine	40 Duncan Terrace Unit: 40	Nancy Sosnowski	08/02/2021 09:40 AM	08/04/2021 12:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1043	Routine			08/02/2021 09:47 AM	08/18/2021 12:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1045	Routine	26 Duncan Terrace Unit: 26	Suzanne Rowe-Heidebrecht	08/02/2021 03:27 PM	08/04/2021 12:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1046	Routine	45 Duncan Terrace Unit: 45	Yvonne Anglero	08/02/2021 03:28 PM	08/10/2021 12:00 AM	\$0.00	\$0.00	\$0.00	\$0.00

W/O #	Priority	Unit Address	Tenant Name	Created Date	Completed Date	Mat.	Labor	Actual	Billed
Program: MA State 667									
Project: 667-1 Duncan Terrace									
1047	Routine			08/02/2021 03:30 PM	08/11/2021 12:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1048	Routine			08/02/2021 03:32 PM	08/04/2021 12:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1049	Routine			08/02/2021 03:33 PM	08/04/2021 12:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1050	Routine			08/02/2021 03:34 PM	08/04/2021 12:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1051	Routine			08/02/2021 03:49 PM	08/04/2021 12:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1055	Routine			08/03/2021 10:28 AM	08/04/2021 12:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1057	Routine	18 Duncan Terrace Unit: 18	Gloria Morrison	08/03/2021 01:44 PM	08/04/2021 12:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1058	Routine	38 Duncan Terrace Unit: 38	Jose Duran	08/03/2021 03:02 PM	10/04/2021 12:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1064	Routine			08/04/2021 03:31 PM	08/18/2021 12:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1065	Routine			08/05/2021 09:10 AM	08/11/2021 04:05 PM	\$0.00	\$0.00	\$0.00	\$0.00
1066	Routine			08/05/2021 10:22 AM	11/10/2021 12:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1068	Routine	43 Duncan Terrace Unit: 43	Susan Korper	08/05/2021 10:32 AM	09/13/2021 08:30 AM	\$0.00	\$0.00	\$0.00	\$0.00
1070	Routine	30 Duncan Terrace Unit: 30	Joanne Rosen	08/05/2021 12:35 PM	08/09/2021 12:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1071	Routine	Building B		08/05/2021 03:00 PM	08/13/2021 10:30 AM	\$0.00	\$0.00	\$0.00	\$0.00
1072	Routine			08/05/2021 03:54 PM	10/04/2021 12:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1075	Routine	38 Duncan Terrace Unit: 38	Jose Duran	08/09/2021 12:02 PM	08/11/2021 12:38 PM	\$0.00	\$0.00	\$0.00	\$0.00
1077	Routine			08/10/2021 10:28 AM	08/11/2021 09:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1080	Routine			08/11/2021 10:46 AM	08/12/2021 12:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1088	Routine			08/16/2021 12:53 PM	08/18/2021 12:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1091	Routine			08/17/2021 10:28 AM	08/20/2021 02:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
1092	Routine	39 Duncan Terrace Unit: 39	Rose Ellen Mcgarvey	08/17/2021 10:37 AM	08/17/2021 12:30 PM	\$0.00	\$0.00	\$0.00	\$0.00
1093	Routine			08/18/2021 09:29 AM	08/19/2021 08:47 AM	\$0.00	\$0.00	\$0.00	\$0.00
1094	Routine	48 Duncan Terrace Unit: 48	Maria Reyes	08/18/2021 09:47 AM	08/19/2021 03:39 PM	\$0.00	\$0.00	\$0.00	\$0.00
1437	Routine			07/31/2021 08:00 AM	10/28/2021 12:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1438	Routine			08/31/2021 08:00 AM	10/28/2021 12:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1439	Routine			08/23/2021 08:00 AM	08/23/2021 08:01 AM	\$0.00	\$0.00	\$0.00	\$0.00
1752	Routine			08/18/2021 03:04 PM	09/14/2021 10:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1754	Routine			08/19/2021 01:15 PM	08/20/2021 10:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1756	Routine			08/23/2021 08:45 AM	08/23/2021 09:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1760	Routine	18 Duncan Terrace Unit: 18	Gloria Morrison	08/23/2021 09:32 AM	08/23/2021 10:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1763	Routine			08/23/2021 01:51 PM	09/21/2021 07:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1772	Routine	12 Duncan Terrace Unit: 12	Linda Welsh	08/26/2021 11:35 AM	08/31/2021 01:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
1775	Routine			08/26/2021 03:52 PM	11/10/2021 12:00 AM	\$0.00	\$0.00	\$0.00	\$0.00

W/O #	Priority	Unit Address	Tenant Name	Created Date	Completed Date	Mat.	Labor	Actual	Billed
Program: MA State 667									
Project: 667-1 Duncan Terrace									
1780	Routine	43 Duncan Terrace Unit: 43	Susan Korper	08/31/2021 11:28 AM	09/08/2021 12:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
1784	Routine			09/01/2021 01:27 PM	09/01/2021 02:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
1787	Routine	45 Duncan Terrace Unit: 45	Yvonne Anglero	09/02/2021 04:18 PM	09/10/2021 12:07 PM	\$0.00	\$0.00	\$0.00	\$0.00
1795	Routine	17 Duncan Terrace Unit: 17	Catherine Scanlan	09/08/2021 09:21 AM	09/16/2021 12:47 PM	\$0.00	\$0.00	\$0.00	\$0.00
1802	Routine			09/09/2021 05:03 PM	09/22/2021 07:15 AM	\$0.00	\$0.00	\$0.00	\$0.00
1805	Routine	33 Duncan Terrace Unit: 33	Rochelle Harris	09/14/2021 10:23 AM	09/14/2021 10:30 AM	\$0.00	\$0.00	\$0.00	\$0.00
1816	Routine	30 Duncan Terrace Unit: 30	Joanne Rosen	09/21/2021 09:49 AM	09/21/2021 11:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1820	Routine	17 Duncan Terrace Unit: 17	Catherine Scanlan	09/22/2021 10:46 AM	09/30/2021 10:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1824	Routine	33 Duncan Terrace Unit: 33	Rochelle Harris	09/23/2021 03:45 PM	09/30/2021 01:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
1826	Routine	48 Duncan Terrace Unit: 48	Maria Reyes	09/27/2021 04:10 PM	11/30/2021 01:30 PM	\$0.00	\$0.00	\$0.00	\$0.00
1827	Routine	33 Duncan Terrace Unit: 33	Rochelle Harris	09/27/2021 04:11 PM	09/29/2021 02:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
1828	Routine	20 Duncan Terrace Unit: 20	Iris Mccarthy	09/27/2021 04:13 PM	09/29/2021 09:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1830	Routine	23 Duncan Terrace Unit: 23	Patricia Gately	09/28/2021 11:57 AM	11/19/2021 03:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
1836	Routine			09/29/2021 02:27 PM	10/28/2021 12:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1840	Routine			09/30/2021 02:12 PM	10/01/2021 09:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1843	Routine			10/04/2021 03:14 PM	11/10/2021 12:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1844	Routine	46 Duncan Terrace Unit: 46	William Scanlan	10/05/2021 01:09 PM	10/28/2021 12:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1846	Routine			10/06/2021 08:35 AM	10/07/2021 09:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1847	Routine			10/06/2021 02:12 PM	10/06/2021 08:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
1861	Routine	14 Duncan Terrace Unit: 14		10/13/2021 02:05 PM	10/14/2021 04:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
1867	Routine	14 Duncan Terrace Unit: 14	Nancy Sosnowski	10/18/2021 09:22 AM	11/17/2021 12:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1873	Routine	45 Duncan Terrace Unit: 45	Yvonne Anglero	10/18/2021 12:43 PM	11/09/2021 12:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1890	Routine	32 Duncan Terrace Unit: 32	Joseph Spindler	10/25/2021 11:03 AM	10/26/2021 01:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
1891	Routine			10/25/2021 11:17 AM	10/25/2021 12:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
1910	Routine	27 Duncan Terrace Unit: 27	Nancy Walsh	11/15/2021 11:52 AM	11/17/2021 08:30 AM	\$0.00	\$0.00	\$0.00	\$0.00
1912	Routine	18 Duncan Terrace Unit: 18	Gloria Morrison	11/16/2021 02:03 PM	11/23/2021 01:45 PM	\$0.00	\$0.00	\$0.00	\$0.00
1914	Routine	26 Duncan Terrace Unit: 26	Suzanne Rowe-Heidebrecht	11/16/2021 02:36 PM	12/08/2021 08:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1920	Routine	46 Duncan Terrace Unit: 46	William Scanlan	11/18/2021 12:53 PM	11/19/2021 11:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1921	Routine	15 Duncan Terrace Unit: 15	Gail Cunningham	11/18/2021 03:28 PM	11/19/2021 12:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1925	Routine	8 Duncan Terrace Unit: 8	Ann Marie Chamberlain	11/22/2021 11:55 AM	11/30/2021 08:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1926	Routine	31 Duncan Terrace Unit: 31	Susan Cornacchini	11/22/2021 03:48 PM	12/02/2021 03:30 PM	\$0.00	\$0.00	\$0.00	\$0.00

W/O #	Priority	Unit Address	Tenant Name	Created Date	Completed Date	Mat.	Labor	Actual	Billed
Program: MA State 667									
Project: 667-1 Duncan Terrace									
1946	Routine	47 Duncan Terrace Unit: 47	Carol Barnes	11/24/2021 09:13 AM	11/30/2021 10:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1952	Routine	Building E		11/30/2021 09:30 AM	11/30/2021 02:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
1953	Routine	34 Duncan Terrace Unit: 34	Robert Cates	11/30/2021 11:29 AM	12/01/2021 10:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1956	Routine	10 Duncan Terrace Unit: 10	Paulina Doucette	11/30/2021 12:35 PM	12/01/2021 01:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
1957	Routine	12 Duncan Terrace Unit: 12	Linda Welsh	11/30/2021 12:40 PM	12/01/2021 10:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1962	Routine	44 Duncan Terrace Unit: 44	Marion Ladd	12/01/2021 03:09 PM	12/01/2021 03:30 PM	\$0.00	\$0.00	\$0.00	\$0.00
1965	Routine			12/02/2021 01:31 PM	12/06/2021 02:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
1976	Routine	40 Duncan Terrace Unit: 40	Nancy Sosnowski	12/07/2021 03:09 PM	12/10/2021 01:30 PM	\$0.00	\$0.00	\$0.00	\$0.00
1980	Routine	30 Duncan Terrace Unit: 30	Joanne Rosen	12/08/2021 10:34 AM	12/08/2021 12:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
1986	Routine			12/08/2021 03:17 PM	12/09/2021 03:30 PM	\$0.00	\$0.00	\$0.00	\$0.00
1987	Routine			12/09/2021 11:28 AM	12/09/2021 03:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
1996	Routine			12/14/2021 10:19 AM	12/14/2021 11:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
2004	Routine	16 Duncan Terrace Unit: 16	Julie Lanzi	12/15/2021 09:49 AM	12/22/2021 11:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
2005	Routine	20 Duncan Terrace Unit: 20	Iris Mccarthy	12/15/2021 10:03 AM	12/22/2021 09:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
2006	Routine	28 Duncan Terrace Unit: 28	Ofelia Lancaster	12/15/2021 10:44 AM	01/03/2022 03:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
2007	Routine	34 Duncan Terrace Unit: 34	Robert Cates	12/15/2021 10:54 AM	01/04/2022 10:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
2009	Routine	50 Duncan Terrace Unit: 50	Sandra Macpherson	12/15/2021 10:56 AM	12/22/2021 08:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
2010	Routine			12/15/2021 01:54 PM	12/16/2021 03:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
2011	Routine			12/15/2021 02:35 PM	12/16/2021 02:30 PM	\$0.00	\$0.00	\$0.00	\$0.00
2020	Routine	50 Duncan Terrace Unit: 50	Sandra Macpherson	12/22/2021 12:39 PM	12/23/2021 11:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
2021	Routine	20 Duncan Terrace Unit: 20	Iris Mccarthy	12/23/2021 09:01 AM	12/28/2021 02:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
2022	Routine			12/23/2021 09:07 AM	12/28/2021 01:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
2024	Routine	40 Duncan Terrace Unit: 40	Nancy Sosnowski	12/23/2021 10:59 AM	02/04/2022 02:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
2031	Routine	49 Duncan Terrace Unit: 49	Rebecca Barrett-Birmingham	12/27/2021 12:37 PM	12/28/2021 11:30 AM	\$0.00	\$0.00	\$0.00	\$0.00
2032	Routine			12/29/2021 01:07 PM	12/30/2021 01:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
2034	Routine			12/29/2021 03:12 PM	12/30/2021 04:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
2039	Routine	39 Duncan Terrace Unit: 39	Frantze Beaucejour	01/03/2022 01:02 PM	01/04/2022 09:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
2042	Routine			01/04/2022 09:02 AM	01/04/2022 01:30 PM	\$0.00	\$0.00	\$0.00	\$0.00
2045	Routine			01/04/2022 11:58 AM	01/18/2022 02:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
2047	Routine			01/04/2022 01:34 PM	01/19/2022 03:30 PM	\$0.00	\$0.00	\$0.00	\$0.00
2048	Routine			01/04/2022 02:55 PM	01/05/2022 07:30 AM	\$0.00	\$0.00	\$0.00	\$0.00
2051	Routine	18 Duncan Terrace Unit: 18	Gloria Morrison	01/05/2022 11:42 AM	01/07/2022 01:30 PM	\$0.00	\$0.00	\$0.00	\$0.00

W/O #	Priority	Unit Address	Tenant Name	Created Date	Completed Date	Mat.	Labor	Actual	Billed
Program: MA State 667									
Project: 667-1 Duncan Terrace									
2058	Routine			01/10/2022 12:56 PM	01/14/2022 11:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
2060	Routine	45 Duncan Terrace Unit: 45	Yvonne Anglero	01/12/2022 09:33 AM	01/13/2022 02:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
2062	Routine			01/12/2022 09:35 AM	01/13/2022 08:30 AM	\$0.00	\$0.00	\$0.00	\$0.00
2069	Routine			01/13/2022 10:40 AM	01/14/2022 12:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
2070	Routine	17 Duncan Terrace Unit: 17	Catherine Scanlan	01/18/2022 11:42 AM	01/19/2022 11:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
2071	Routine			01/19/2022 08:51 AM	01/19/2022 08:54 AM	\$0.00	\$0.00	\$0.00	\$0.00
2072	Routine			01/19/2022 08:52 AM	01/19/2022 09:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
2073	Routine			01/19/2022 08:58 AM	01/19/2022 01:49 PM	\$0.00	\$0.00	\$0.00	\$0.00
2076	Routine			01/19/2022 03:46 PM	01/20/2022 09:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
2082	Routine	36 Duncan Terrace Unit: 36	Christine Dixon	01/27/2022 03:14 PM	01/27/2022 03:17 PM	\$0.00	\$0.00	\$0.00	\$0.00
2099	Routine	30 Duncan Terrace Unit: 30	Joanne Rosen	01/31/2022 11:38 AM	02/02/2022 12:11 PM	\$0.00	\$0.00	\$0.00	\$0.00
2103	Routine	21 Duncan Terrace Unit: 21	Joan Hubbard	01/31/2022 02:08 PM	01/31/2022 02:10 PM	\$0.00	\$0.00	\$0.00	\$0.00
2111	Routine	23 Duncan Terrace Unit: 23	Patricia Gately	02/03/2022 12:49 PM	02/16/2022 01:30 PM	\$0.00	\$0.00	\$0.00	\$0.00
2113	Routine			02/03/2022 03:10 PM	02/03/2022 03:35 PM	\$0.00	\$0.00	\$0.00	\$0.00
2122	Routine	36 Duncan Terrace Unit: 36	Christine Dixon	02/08/2022 12:01 PM	02/08/2022 01:19 PM	\$0.00	\$0.00	\$0.00	\$0.00
2123	Routine	27 Duncan Terrace Unit: 27	Nancy Walsh	02/08/2022 03:53 PM	02/08/2022 03:56 PM	\$0.00	\$0.00	\$0.00	\$0.00
2124	Routine	27 Duncan Terrace Unit: 27	Nancy Walsh	02/09/2022 09:24 AM	02/09/2022 09:24 AM	\$0.00	\$0.00	\$0.00	\$0.00
2125	Routine	36 Duncan Terrace Unit: 36	Christine Dixon	02/09/2022 09:25 AM	02/09/2022 09:26 AM	\$0.00	\$0.00	\$0.00	\$0.00
2133	Routine			02/14/2022 10:40 AM	02/14/2022 12:20 PM	\$0.00	\$0.00	\$0.00	\$0.00
2138	Routine	36 Duncan Terrace Unit: 36	Christine Dixon	02/15/2022 09:06 AM	03/24/2022 04:24 PM	\$0.00	\$0.00	\$0.00	\$0.00
2139	Routine	39 Duncan Terrace Unit: 39	Frantze Beaucejour	02/15/2022 12:01 PM	02/16/2022 10:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
2140	Routine			02/15/2022 03:02 PM	02/16/2022 08:44 AM	\$0.00	\$0.00	\$0.00	\$0.00
2144	Routine	Building A		02/16/2022 12:44 PM	03/24/2022 04:23 PM	\$0.00	\$0.00	\$0.00	\$0.00
2146	Routine	36 Duncan Terrace Unit: 36	Christine Dixon	02/16/2022 01:57 PM	02/23/2022 11:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
2148	Routine			02/16/2022 02:45 PM	02/22/2022 08:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
2155	Routine	14 Duncan Terrace Unit: 14	Nancy Sosnowski	02/22/2022 10:18 AM	02/22/2022 01:30 PM	\$0.00	\$0.00	\$0.00	\$0.00
2156	Routine	50 Duncan Terrace Unit: 50	Sandra Macpherson	02/22/2022 11:06 AM	02/23/2022 09:15 AM	\$0.00	\$0.00	\$0.00	\$0.00
2157	Routine			02/22/2022 01:33 PM	02/22/2022 03:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
2158	Routine			02/22/2022 01:34 PM	02/24/2022 02:30 PM	\$0.00	\$0.00	\$0.00	\$0.00
2167	Routine			03/01/2022 12:16 PM	03/04/2022 12:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
2179	Routine			03/08/2022 10:58 AM	03/08/2022 11:15 AM	\$0.00	\$0.00	\$0.00	\$0.00
2186	Routine	17 Duncan Terrace Unit: 17	Catherine Scanlan	03/16/2022 02:45 PM	03/17/2022 12:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
2188	Routine			03/21/2022 09:57 AM	03/24/2022 04:17 PM	\$0.00	\$0.00	\$0.00	\$0.00

W/O #	Priority	Unit Address	Tenant Name	Created Date	Completed Date	Mat.	Labor	Actual	Billed
Program: MA State 667									
Project: 667-1 Duncan Terrace									
2194	Routine	8 Duncan Terrace Unit: 8	Ann Marie Chamberlain	03/23/2022 11:24 AM	03/24/2022 12:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
2195	Routine			03/24/2022 12:15 PM	03/25/2022 09:30 AM	\$0.00	\$0.00	\$0.00	\$0.00
667-1 Duncan Terrace		Incomplete: 0		Complete: 149		\$0.00	\$0.00	\$0.00	\$0.00
Project: 667-2 Doherty Circle									
990	Routine	49D Doherty Circle Unit: 49D	Elizabeth Gordon	07/01/2021 11:16 AM	07/02/2021 11:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
993	Routine	41D Doherty Circle Unit: 41D	Erin Cheever	07/06/2021 09:34 AM	07/07/2021 09:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
995	Routine	49D Doherty Circle Unit: 49D	Elizabeth Gordon	07/06/2021 10:11 AM	07/07/2021 10:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1014	Routine			07/12/2021 01:46 PM	07/13/2021 10:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1018	Routine	41B Doherty Circle Unit: 41B	Stephanie Rusnak	07/15/2021 09:29 AM	07/15/2021 02:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
1020	Routine	51A Doherty Circle Unit: 51A	Hui-Tien Ly	07/19/2021 09:48 AM	07/19/2021 12:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
1023	Routine	49D Doherty Circle Unit: 49D	Elizabeth Gordon	07/19/2021 11:06 AM	07/19/2021 02:19 PM	\$0.00	\$0.00	\$0.00	\$0.00
1024	Routine	25D Doherty Circle Unit: 25D	Ronda Maitland	07/20/2021 08:46 AM	07/20/2021 12:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
1027	Routine			07/21/2021 02:35 PM	07/23/2021 01:15 PM	\$0.00	\$0.00	\$0.00	\$0.00
1044	Routine	1B Doherty Circle Unit: 1B	Altagracia Baez	08/02/2021 01:57 PM	08/04/2021 12:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1052	Routine	41A Doherty Circle Unit: 41A	Gregg Bethune	08/03/2021 09:06 AM	08/05/2021 12:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1053	Routine	235A Doherty Circle Unit: 235A	Robert Benson	08/03/2021 09:14 AM	08/04/2021 12:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1054	Routine	235B Doherty Circle Unit: 235B	Felix Polanco	08/03/2021 09:30 AM	08/04/2021 12:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1059	Routine	235A Doherty Circle Unit: 235A	Robert Benson	08/04/2021 11:48 AM	08/05/2021 12:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1060	Routine	17A Doherty Circle Unit: 17A	Melissa Turner	08/04/2021 12:07 PM	08/05/2021 12:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1061	Routine	9B Doherty Circle Unit: 9B	Lucy Lally	08/04/2021 12:08 PM	08/05/2021 12:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1062	Routine	41A Doherty Circle Unit: 41A	Gregg Bethune	08/04/2021 12:08 PM	08/05/2021 12:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1067	Routine			08/05/2021 10:24 AM	08/18/2021 07:53 AM	\$0.00	\$0.00	\$0.00	\$0.00
1081	Routine			08/11/2021 01:53 PM	09/12/2021 12:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
1083	Routine	Building I		08/12/2021 03:16 PM	08/19/2021 06:30 AM	\$0.00	\$0.00	\$0.00	\$0.00
1087	Routine			08/16/2021 12:43 PM	11/10/2021 12:00 AM	\$0.00	\$0.00	\$0.00	\$0.00

W/O #	Priority	Unit Address	Tenant Name	Created Date	Completed Date	Mat.	Labor	Actual	Billed
Program: MA State 667									
Project: 667-2 Doherty Circle									
1089	Routine			08/16/2021 02:40 PM	08/17/2021 01:48 PM	\$0.00	\$0.00	\$0.00	\$0.00
1749	Routine			07/31/2021 08:00 AM	10/28/2021 12:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1750	Routine			08/31/2021 08:00 AM	10/28/2021 12:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1751	Routine			08/23/2021 08:00 AM	08/25/2021 07:16 AM	\$0.00	\$0.00	\$0.00	\$0.00
1755	Routine	Building V		08/19/2021 03:23 PM	08/25/2021 07:12 AM	\$0.00	\$0.00	\$0.00	\$0.00
1758	Routine	17A Doherty Circle Unit: 17A	Melissa Turner	08/23/2021 09:29 AM	08/23/2021 10:22 AM	\$0.00	\$0.00	\$0.00	\$0.00
1759	Routine	235B Doherty Circle Unit: 235B	Felix Polanco	08/23/2021 09:30 AM	09/01/2021 11:52 AM	\$0.00	\$0.00	\$0.00	\$0.00
1764	Routine			08/23/2021 02:54 PM	11/10/2021 12:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1765	Routine	41A Doherty Circle Unit: 41A	Gregg Bethune	08/24/2021 08:38 AM	08/25/2021 02:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
1776	Routine			08/26/2021 03:54 PM	08/30/2021 10:30 AM	\$0.00	\$0.00	\$0.00	\$0.00
1781	Routine	243B Doherty Circle Unit: 243B	Doris Smith	09/01/2021 09:37 AM	09/01/2021 12:48 PM	\$0.00	\$0.00	\$0.00	\$0.00
1783	Routine	41B Doherty Circle Unit: 41B	Stephanie Rusnak	09/01/2021 12:15 PM	09/01/2021 12:50 PM	\$0.00	\$0.00	\$0.00	\$0.00
1790	Routine			09/07/2021 09:23 AM	09/07/2021 11:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1794	Routine	41C Doherty Circle Unit: 41C	Fernando Murga	09/07/2021 09:30 AM	09/14/2021 01:04 PM	\$0.00	\$0.00	\$0.00	\$0.00
1799	Routine	51A Doherty Circle Unit: 51A	Hui-Tien Ly	09/09/2021 01:52 PM	09/16/2021 11:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1800	Routine	41A Doherty Circle Unit: 41A	Gregg Bethune	09/09/2021 02:16 PM	09/10/2021 09:45 AM	\$0.00	\$0.00	\$0.00	\$0.00
1804	Routine	41D Doherty Circle Unit: 41D	Erin Cheever	09/13/2021 02:14 PM	09/14/2021 10:06 AM	\$0.00	\$0.00	\$0.00	\$0.00
1818	Routine			09/21/2021 01:53 PM	09/21/2021 01:54 PM	\$0.00	\$0.00	\$0.00	\$0.00
1823	Routine	41A Doherty Circle Unit: 41A	Gregg Bethune	09/23/2021 12:06 PM	09/29/2021 10:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1825	Routine	17A Doherty Circle Unit: 17A	Melissa Turner	09/27/2021 04:09 PM	09/28/2021 02:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
1837	Routine			09/29/2021 03:52 PM	10/06/2021 11:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1841	Routine	41A Doherty Circle Unit: 41A	Gregg Bethune	10/04/2021 09:53 AM	10/18/2021 10:30 AM	\$0.00	\$0.00	\$0.00	\$0.00
1849	Routine	41A Doherty Circle Unit: 41A	Gregg Bethune	10/07/2021 10:28 AM	10/18/2021 10:30 AM	\$0.00	\$0.00	\$0.00	\$0.00
1854	Routine	51A Doherty Circle Unit: 51A	Hui-Tien Ly	10/07/2021 02:18 PM	10/08/2021 02:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
1889	Routine			10/25/2021 10:56 AM	11/09/2021 12:00 AM	\$0.00	\$0.00	\$0.00	\$0.00

W/O #	Priority	Unit Address	Tenant Name	Created Date	Completed Date	Mat.	Labor	Actual	Billed
Program: MA State 667									
Project: 667-2 Doherty Circle									
1895	Routine			10/27/2021 09:59 AM	10/28/2021 12:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1898	Routine	49D Doherty Circle Unit: 49D	Elizabeth Gordon	11/10/2021 11:49 AM	11/18/2021 12:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1899	Routine	17A Doherty Circle Unit: 17A	Melissa Turner	11/10/2021 11:53 AM	11/15/2021 12:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1900	Routine	41A Doherty Circle Unit: 41A	Gregg Bethune	11/10/2021 12:15 PM	11/17/2021 12:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1913	Routine	9A Doherty Circle Unit: 9A	Donna Butts	11/16/2021 02:04 PM	11/30/2021 03:30 PM	\$0.00	\$0.00	\$0.00	\$0.00
1927	Routine	25A Doherty Circle Unit: 25A		11/23/2021 08:50 AM	11/23/2021 11:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1954	Routine	1B Doherty Circle Unit: 1B	Altagracia Baez	11/30/2021 11:51 AM	12/01/2021 03:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
1955	Routine	17A Doherty Circle Unit: 17A	Melissa Turner	11/30/2021 11:53 AM	12/01/2021 09:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1958	Routine	17B Doherty Circle Unit: 17B	Gail Mac Gregor	11/30/2021 02:42 PM	12/10/2021 11:30 AM	\$0.00	\$0.00	\$0.00	\$0.00
1968	Routine	17A Doherty Circle Unit: 17A	Melissa Turner	12/07/2021 09:09 AM	12/07/2021 02:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
1969	Routine	33A Doherty Circle Unit: 33A	Connie Zimmerman	12/07/2021 09:32 AM	12/08/2021 02:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
1971	Routine			12/07/2021 10:46 AM	12/10/2021 08:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1972	Routine	33C Doherty Circle Unit: 33C	James Boraizia	12/07/2021 02:50 PM	12/10/2021 08:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1973	Routine			12/07/2021 02:53 PM	12/09/2021 09:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
1979	Routine	49C Doherty Circle Unit: 49C	Suzanne Dingle	12/08/2021 10:33 AM	12/10/2021 04:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
1985	Routine	59B Doherty Circle Unit: 59B	Christopher Goodwin	12/08/2021 01:54 PM	12/09/2021 03:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
1997	Routine	25B Doherty Circle Unit: 25B	Charles Chapman	12/14/2021 12:57 PM	12/17/2021 11:30 AM	\$0.00	\$0.00	\$0.00	\$0.00
1998	Routine	17A Doherty Circle Unit: 17A	Melissa Turner	12/14/2021 02:23 PM	12/15/2021 02:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
2014	Routine	59D Doherty Circle Unit: 59D	Noeleen Barry	12/20/2021 09:05 AM	12/21/2021 09:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
2015	Routine	49D Doherty Circle Unit: 49D	Elizabeth Gordon	12/20/2021 10:03 AM	12/21/2021 10:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
2023	Routine	1A Doherty Circle Unit: 1A	Nicolina Meere	12/23/2021 10:47 AM	12/28/2021 10:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
2035	Routine	9B Doherty Circle Unit: 9B	Lucy Lally	12/30/2021 09:00 AM	12/30/2021 11:30 AM	\$0.00	\$0.00	\$0.00	\$0.00
2036	Routine	41D Doherty Circle Unit: 41D	Erin Cheever	12/30/2021 01:22 PM	12/30/2021 02:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
2043	Routine	49C Doherty Circle Unit: 49C	Suzanne Dingle	01/04/2022 09:30 AM	01/04/2022 11:00 AM	\$0.00	\$0.00	\$0.00	\$0.00

W/O #	Priority	Unit Address	Tenant Name	Created Date	Completed Date	Mat.	Labor	Actual	Billed
Program: MA State 667									
Project: 667-2 Doherty Circle									
2044	Routine	41D Doherty Circle Unit: 41D	Erin Cheever	01/04/2022 09:36 AM	01/04/2022 11:30 AM	\$0.00	\$0.00	\$0.00	\$0.00
2049	Routine	41B Doherty Circle Unit: 41B	Stephanie Rusnak	01/05/2022 09:19 AM	01/07/2022 09:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
2053	Routine	25D Doherty Circle Unit: 25D	Ronda Maitland	01/06/2022 02:21 PM	01/14/2022 08:30 AM	\$0.00	\$0.00	\$0.00	\$0.00
2054	Routine			01/06/2022 02:22 PM	01/12/2022 01:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
2055	Routine			01/06/2022 03:31 PM	01/11/2022 02:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
2067	Routine	59B Doherty Circle Unit: 59B	Christopher Goodwin	01/12/2022 11:46 AM	01/13/2022 11:30 AM	\$0.00	\$0.00	\$0.00	\$0.00
2068	Routine	41C Doherty Circle Unit: 41C	Fernando Murga	01/13/2022 10:39 AM	01/18/2022 09:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
2075	Routine	33A Doherty Circle Unit: 33A	Connie Zimmerman	01/19/2022 03:43 PM	01/20/2022 09:41 AM	\$0.00	\$0.00	\$0.00	\$0.00
2083	Routine	41A Doherty Circle Unit: 41A	Gregg Bethune	01/27/2022 03:15 PM	01/27/2022 03:19 PM	\$0.00	\$0.00	\$0.00	\$0.00
2108	Routine	17D Doherty Circle Unit: 17D	Alan Ledbury	02/02/2022 08:40 AM	02/02/2022 09:09 AM	\$0.00	\$0.00	\$0.00	\$0.00
2143	Routine	Building II		02/16/2022 12:39 PM	02/21/2022 07:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
2150	Routine	25D Doherty Circle Unit: 25D	Ronda Maitland	02/17/2022 10:26 AM	02/17/2022 10:27 AM	\$0.00	\$0.00	\$0.00	\$0.00
2153	Routine			02/17/2022 04:08 PM	02/17/2022 04:08 PM	\$0.00	\$0.00	\$0.00	\$0.00
2170	Routine	49D Doherty Circle Unit: 49D	Elizabeth Gordon	03/01/2022 03:13 PM	03/02/2022 12:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
2173	Routine	33A Doherty Circle Unit: 33A	Connie Zimmerman	03/02/2022 02:26 PM	03/03/2022 12:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
2175	Routine	59D Doherty Circle Unit: 59D	Noeleen Barry	03/03/2022 09:56 AM	03/03/2022 09:57 AM	\$0.00	\$0.00	\$0.00	\$0.00
2176	Routine	49C Doherty Circle Unit: 49C	Suzanne Dingle	03/08/2022 08:58 AM	03/09/2022 12:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
2180	Routine	41A Doherty Circle Unit: 41A	Gregg Bethune	03/09/2022 09:22 AM	03/10/2022 12:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
2182	Routine			03/14/2022 12:24 PM	03/16/2022 12:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
2189	Routine			03/21/2022 01:29 PM	03/22/2022 12:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
2193	Routine	9A Doherty Circle Unit: 9A	Donna Butts	03/23/2022 09:12 AM	03/25/2022 12:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
2196	Routine	49C Doherty Circle Unit: 49C	Suzanne Dingle	03/24/2022 12:19 PM	03/25/2022 12:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
2208	Routine	9A Doherty Circle Unit: 9A	Donna Butts	04/04/2022 09:35 AM	04/04/2022 09:36 AM	\$0.00	\$0.00	\$0.00	\$0.00
667-2 Doherty Circle		Incomplete: 0		Complete: 93		\$0.00	\$0.00	\$0.00	\$0.00

W/O #	Priority	Unit Address	Tenant Name	Created Date	Completed Date	Mat.	Labor	Actual	Billed
MA State 667		Incomplete: 0		Complete: 242		\$0.00	\$0.00	\$0.00	\$0.00
Program: MA State 200									
Project: 200-1 Margaret M. Kelly Community									
997	Routine	15 Cherry Street Unit: 15CS	Jessica Javier	07/06/2021 03:11 PM	07/27/2021 12:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1008	Routine	13 Cherry Court Unit: 13CC	Austria Paulino	07/08/2021 04:27 PM	07/12/2021 10:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1019	Routine	49 Cherry Street Unit: 49CS	Catherine Dupuis	07/15/2021 12:10 PM	07/19/2021 10:27 AM	\$0.00	\$0.00	\$0.00	\$0.00
1037	Routine	29 Cherry Street Unit: 29CS	Michelle Burns	07/27/2021 02:39 PM	07/28/2021 12:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1056	Routine	4 Cherry Court Unit: 4CC	Leonid Pindrus	08/03/2021 10:48 AM	08/04/2021 12:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1069	Routine	21 Cherry Street Unit: 21CS	Carolyn Espinal	08/05/2021 10:50 AM	08/18/2021 12:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1074	Routine	8 Cherry Court Unit: 8CC	Nicole Vousboukis	08/09/2021 11:36 AM	08/10/2021 12:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1076	Routine	13 Cherry Court Unit: 13CC	Austria Paulino	08/09/2021 01:43 PM	08/20/2021 01:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
1096	Routine	Building One		08/23/2021 08:00 AM	08/23/2021 10:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1234	Routine			07/31/2021 08:00 AM	10/28/2021 12:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1235	Routine			08/31/2021 08:00 AM	10/28/2021 12:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1761	Routine	43 Cherry Street Unit: 43CS	Robin Mannion	08/23/2021 09:33 AM	08/23/2021 09:58 AM	\$0.00	\$0.00	\$0.00	\$0.00
1769	Routine	51 Cherry Street Unit: 51CS	Rosa Romero	08/25/2021 03:27 PM	11/23/2021 11:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1771	Routine			08/26/2021 11:22 AM	09/03/2021 11:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1782	Routine			09/01/2021 10:41 AM	09/03/2021 11:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1785	Routine			09/02/2021 11:23 AM	09/07/2021 02:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
1788	Routine	51 Cherry Street Unit: 51CS	Rosa Romero	09/02/2021 04:19 PM	10/28/2021 12:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1807	Routine	8 Cherry Court Unit: 8CC	Nicole Vousboukis	09/15/2021 10:11 AM	01/26/2022 11:30 AM	\$0.00	\$0.00	\$0.00	\$0.00
1829	Routine	27 Cherry Street Unit: 27CS	Narcisa Melendez	09/28/2021 11:40 AM	11/18/2021 12:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1834	Routine			09/29/2021 12:49 PM	09/30/2021 04:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
1852	Routine	33 Cherry Street Unit: 33CS	Karen Garcia	10/07/2021 10:39 AM	02/16/2022 12:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1853	Routine	17 Cherry Street Unit: 17CS	Lisette Marte	10/07/2021 10:41 AM	03/17/2022 12:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
1871	Routine	35 Cherry Street Unit: 35CS	Natasha King	10/18/2021 12:09 PM	12/07/2021 10:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1874	Routine	29 Cherry Street Unit: 29CS	Michelle Burns	10/18/2021 12:54 PM	11/23/2021 12:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1878	Routine	51 Cherry Street Unit: 51CS	Rosa Romero	10/18/2021 02:11 PM	01/20/2022 03:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
1888	Routine	2 Cherry Court Unit: 2CC	Barbara Carone	10/25/2021 10:13 AM	10/25/2021 02:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
1896	Routine	17 Cherry Street Unit: 17CS	Lisette Marte	11/10/2021 09:33 AM	12/15/2021 02:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
1917	Routine	16 Cherry Court Unit: 16CC	John Cambece	11/17/2021 02:05 PM	11/23/2021 11:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1918	Routine	11 Cherry Court Unit: 11CC	Amy Berbine	11/17/2021 02:06 PM	11/23/2021 03:30 PM	\$0.00	\$0.00	\$0.00	\$0.00
1919	Routine	31 Cherry Street Unit: 31CS	Yeimi Reynoso	11/18/2021 12:46 PM	11/19/2021 12:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
1922	Routine	31 Cherry Street Unit: 31CS	Yeimi Reynoso	11/18/2021 03:30 PM	11/19/2021 12:00 AM	\$0.00	\$0.00	\$0.00	\$0.00

W/O #	Priority	Unit Address	Tenant Name	Created Date	Completed Date	Mat.	Labor	Actual	Billed
Program: MA State 200									
Project: 200-1 Margaret M. Kelly Community									
1929	Routine	17 Cherry Street Unit: 17CS	Lisette Marte	11/23/2021 11:20 AM	12/01/2021 12:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
1960	Routine	15 Cherry Court Unit: 15CC	Jazmin Fernandez	12/01/2021 09:39 AM	12/01/2021 11:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1964	Routine	17 Cherry Street Unit: 17CS	Lisette Marte	12/02/2021 01:28 PM	12/02/2021 02:15 PM	\$0.00	\$0.00	\$0.00	\$0.00
1966	Routine	37 Cherry Street Unit: 37CS	Cintia Ponciano	12/06/2021 12:53 PM	12/07/2021 11:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1983	Routine	51 Cherry Street Unit: 51CS	Rosa Romero	12/08/2021 01:23 PM	01/26/2022 10:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1984	Routine	31 Cherry Street Unit: 31CS	Yeimi Reynoso	12/08/2021 01:37 PM	12/16/2021 10:30 AM	\$0.00	\$0.00	\$0.00	\$0.00
1994	Routine	35 Cherry Street Unit: 35CS	Natasha King	12/14/2021 09:21 AM	12/14/2021 01:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
1999	Routine	1 Cherry Court Unit: 1CC	Jocelyn Smith	12/15/2021 09:37 AM	12/16/2021 11:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
2000	Routine	10 Cherry Court Unit: 10CC	Sherise Ross	12/15/2021 09:41 AM	02/03/2022 11:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
2001	Routine	11 Cherry Court Unit: 11CC	Amy Berbine	12/15/2021 09:42 AM	03/28/2022 03:33 PM	\$0.00	\$0.00	\$0.00	\$0.00
2002	Routine	14 Cherry Court Unit: 14CC	Tara Stanley	12/15/2021 09:44 AM	12/30/2021 08:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
2003	Routine	19 Cherry Street Unit: 19CS	Daniel Mora	12/15/2021 09:46 AM	01/20/2022 01:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
2026	Routine	15 Cherry Court Unit: 15CC	Jazmin Fernandez	12/27/2021 09:09 AM	12/28/2021 11:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
2046	Routine	21 Cherry Street Unit: 21CS	Carolyn Espinal	01/04/2022 01:00 PM	01/04/2022 02:30 PM	\$0.00	\$0.00	\$0.00	\$0.00
2078	Routine	21 Cherry Street Unit: 21CS	Carolyn Espinal	01/24/2022 12:01 PM	01/25/2022 11:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
2101	Routine	33 Cherry Street Unit: 33CS	Karen Garcia	01/31/2022 02:05 PM	01/31/2022 02:06 PM	\$0.00	\$0.00	\$0.00	\$0.00
2107	Routine	3 Cherry Court Unit: 3CC	Leslie Anthos	02/01/2022 02:33 PM	02/03/2022 02:30 PM	\$0.00	\$0.00	\$0.00	\$0.00
2110	Routine	3 Cherry Court Unit: 3CC	Leslie Anthos	02/02/2022 02:38 PM	02/02/2022 03:44 PM	\$0.00	\$0.00	\$0.00	\$0.00
2126	Routine	2 Cherry Court Unit: 2CC	Barbara Carone	02/09/2022 12:15 PM	02/09/2022 12:40 PM	\$0.00	\$0.00	\$0.00	\$0.00
2159	Routine	15 Cherry Street Unit: 15CS	Jessica Javier	02/23/2022 10:38 AM	02/23/2022 02:30 PM	\$0.00	\$0.00	\$0.00	\$0.00
2166	Routine	23 Cherry Street Unit: 23CS	Philip Shire	02/28/2022 12:37 PM	02/28/2022 12:38 PM	\$0.00	\$0.00	\$0.00	\$0.00
2171	Routine	15 Cherry Street Unit: 15CS	Jessica Javier	03/02/2022 10:02 AM	03/24/2022 04:22 PM	\$0.00	\$0.00	\$0.00	\$0.00
2183	Routine	11 Cherry Court Unit: 11CC	Amy Berbine	03/14/2022 12:31 PM	03/24/2022 04:21 PM	\$0.00	\$0.00	\$0.00	\$0.00
2187	Routine	15 Cherry Street Unit: 15CS	Jessica Javier	03/17/2022 12:52 PM	03/24/2022 04:20 PM	\$0.00	\$0.00	\$0.00	\$0.00
2199	Routine	15 Cherry Street Unit: 15CS	Jessica Javier	03/25/2022 12:08 PM	03/25/2022 12:10 PM	\$0.00	\$0.00	\$0.00	\$0.00
2212	Routine	49 Cherry Street Unit: 49CS	Catherine Dupuis	04/05/2022 09:33 AM	04/06/2022 12:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
200-1 Margaret M. Kelly Community		Incomplete: 0		Complete: 57		\$0.00	\$0.00	\$0.00	\$0.00
MA State 200		Incomplete: 0		Complete: 57		\$0.00	\$0.00	\$0.00	\$0.00

W/O #	Priority	Unit Address	Tenant Name	Created Date	Completed Date	Mat.	Labor	Actual	Billed
Program: State Mod									
Project: State Mod									
1989	Routine			12/09/2021 02:58 PM	12/10/2021 09:30 AM	\$0.00	\$0.00	\$0.00	\$0.00
State Mod			Incomplete: 0		Complete: 1	\$0.00	\$0.00	\$0.00	\$0.00
State Mod			Incomplete: 0		Complete: 1	\$0.00	\$0.00	\$0.00	\$0.00
Grand Totals:			Incomplete: 0		Complete: 300	\$0.00	\$0.00	\$0.00	\$0.00

Swampscott Housing Authority

Work Order Complete/Incomplete Report

Program: , Project: All, Created From: 7/1/2021, Created Through: 4/5/2022, Status: Complete, Status Included: Emergency, Employee: All, Completed From: 7/1/2021, Completed Through: 4/5/2022

Work Order By Priority					
Priority	Count	Incomplete	Complete	Tot. Days	Avg. Days
Emergency	225	0	225	1,295.00	5.76
Totals:	225	0	225	1,295.00	5.76

Work Order By Employee					
Assigned Employee	Count	Incomplete	Complete	Tot. Days	Avg. Days
Florentino Rivera	7	0	7	45.00	6.43
John Fernandes	90	0	90	330.00	3.67
Peter Grocki	98	0	98	877.00	8.95
Phil Shire	30	0	30	43.00	1.43
Totals:	225	0	225	1,295.00	5.76

W/O #	Priority	Unit Address	Tenant Name	Created Date	Completed Date	Mat.	Labor	Actual	Billed
Program: MA State 667									
Project: 667-1 Duncan Terrace									
989	Emergency	16 Duncan Terrace Unit: 16	Julie Lanzi	07/01/2021 08:44 AM	07/01/2021 01:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
996	Emergency	36 Duncan Terrace Unit: 36	Christine Dixon	07/06/2021 01:35 PM	07/07/2021 01:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
1005	Emergency	50 Duncan Terrace Unit: 50	Sandra Macpherson	07/07/2021 02:30 PM	07/27/2021 12:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1011	Emergency	36 Duncan Terrace Unit: 36	Christine Dixon	07/12/2021 11:21 AM	07/13/2021 02:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
1013	Emergency	50 Duncan Terrace Unit: 50	Sandra Macpherson	07/12/2021 01:46 PM	08/13/2021 12:47 PM	\$0.00	\$0.00	\$0.00	\$0.00
1016	Emergency	39 Duncan Terrace Unit: 39	Rose Ellen Mcgarvey	07/12/2021 03:48 PM	07/27/2021 12:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1021	Emergency	40 Duncan Terrace Unit: 40	Nancy Sosnowski	07/19/2021 09:50 AM	07/27/2021 12:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1035	Emergency	49 Duncan Terrace Unit: 49	Rebecca Barrett-Birmingham	07/26/2021 02:00 PM	07/27/2021 12:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1038	Emergency	29 Duncan Terrace Unit: 29	Carlos Julia-Rodriquez	07/28/2021 12:26 PM	08/02/2021 12:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1063	Emergency	50 Duncan Terrace Unit: 50	Sandra Macpherson	08/04/2021 03:25 PM	08/05/2021 12:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1078	Emergency	23 Duncan Terrace Unit: 23	Patricia Gately	08/10/2021 02:04 PM	08/11/2021 01:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
1079	Emergency	35 Duncan Terrace Unit: 35	Paul Green	08/11/2021 09:05 AM	08/11/2021 11:33 AM	\$0.00	\$0.00	\$0.00	\$0.00
1084	Emergency	17 Duncan Terrace Unit: 17	Catherine Scanlan	08/16/2021 10:43 AM	08/17/2021 11:44 AM	\$0.00	\$0.00	\$0.00	\$0.00
1095	Emergency	38 Duncan Terrace Unit: 38	Jose Duran	08/18/2021 12:20 PM	08/19/2021 01:30 PM	\$0.00	\$0.00	\$0.00	\$0.00
1773	Emergency	28 Duncan Terrace Unit: 28	Ofelia Lancaster	08/26/2021 11:53 AM	08/31/2021 02:53 PM	\$0.00	\$0.00	\$0.00	\$0.00
1778	Emergency	27 Duncan Terrace Unit: 27	Nancy Walsh	08/30/2021 09:07 AM	08/30/2021 01:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
1789	Emergency			09/02/2021 05:03 PM	09/02/2021 05:30 PM	\$0.00	\$0.00	\$0.00	\$0.00
1793	Emergency	36 Duncan Terrace Unit: 36	Christine Dixon	09/07/2021 09:29 AM	09/07/2021 02:00 PM	\$0.00	\$0.00	\$0.00	\$0.00

W/O #	Priority	Unit Address	Tenant Name	Created Date	Completed Date	Mat.	Labor	Actual	Billed
Program: MA State 667									
Project: 667-1 Duncan Terrace									
1806	Emergency	28 Duncan Terrace Unit: 28	Ofelia Lancaster	09/15/2021 10:10 AM	09/17/2021 11:39 AM	\$0.00	\$0.00	\$0.00	\$0.00
1808	Emergency	40 Duncan Terrace Unit: 40	Nancy Sosnowski	09/16/2021 12:23 PM	09/17/2021 09:28 AM	\$0.00	\$0.00	\$0.00	\$0.00
1809	Emergency	44 Duncan Terrace Unit: 44	Marion Ladd	09/16/2021 02:44 PM	09/17/2021 01:39 PM	\$0.00	\$0.00	\$0.00	\$0.00
1811	Emergency	46 Duncan Terrace Unit: 46	William Scanlan	09/20/2021 01:11 PM	09/20/2021 02:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
1812	Emergency	30 Duncan Terrace Unit: 30	Joanne Rosen	09/20/2021 01:12 PM	09/20/2021 02:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
1815	Emergency	34 Duncan Terrace Unit: 34	Robert Cates	09/21/2021 08:58 AM	09/22/2021 03:30 PM	\$0.00	\$0.00	\$0.00	\$0.00
1821	Emergency	24 Duncan Terrace Unit: 24	Maureen Morrison	09/22/2021 01:00 PM	09/22/2021 01:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
1822	Emergency	34 Duncan Terrace Unit: 34	Robert Cates	09/22/2021 02:45 PM	09/22/2021 04:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
1831	Emergency	50 Duncan Terrace Unit: 50	Sandra Macpherson	09/28/2021 03:28 PM	09/28/2021 05:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
1832	Emergency	19 Duncan Terrace Unit: 19	Gail Tighe	09/29/2021 10:26 AM	09/29/2021 12:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
1833	Emergency	30 Duncan Terrace Unit: 30	Joanne Rosen	09/29/2021 12:48 PM	09/29/2021 01:55 PM	\$0.00	\$0.00	\$0.00	\$0.00
1838	Emergency	19 Duncan Terrace Unit: 19	Gail Tighe	09/30/2021 10:34 AM	10/05/2021 12:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
1845	Emergency	19 Duncan Terrace Unit: 19	Gail Tighe	10/05/2021 01:21 PM	10/05/2021 02:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
1848	Emergency	39 Duncan Terrace Unit: 39		10/06/2021 03:43 PM	10/06/2021 09:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
1856	Emergency	30 Duncan Terrace Unit: 30	Joanne Rosen	10/12/2021 10:55 AM	10/12/2021 11:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1857	Emergency	18 Duncan Terrace Unit: 18	Gloria Morrison	10/12/2021 10:56 AM	10/12/2021 06:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
1859	Emergency	24 Duncan Terrace Unit: 24	Maureen Morrison	10/12/2021 03:44 PM	10/12/2021 03:50 PM	\$0.00	\$0.00	\$0.00	\$0.00
1865	Emergency	26 Duncan Terrace Unit: 26	Suzanne Rowe-Heidebrecht	10/14/2021 04:23 PM	10/28/2021 12:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1880	Emergency	32 Duncan Terrace Unit: 32	Joseph Spindler	10/19/2021 09:44 AM	10/20/2021 02:35 PM	\$0.00	\$0.00	\$0.00	\$0.00
1881	Emergency	34 Duncan Terrace Unit: 34	Robert Cates	10/20/2021 09:17 AM	10/28/2021 12:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1884	Emergency	18 Duncan Terrace Unit: 18	Gloria Morrison	10/21/2021 12:03 PM	10/28/2021 12:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1886	Emergency	37 Duncan Terrace Unit: 37	Cynthia Tennant	10/25/2021 09:25 AM	11/18/2021 12:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1887	Emergency	45 Duncan Terrace Unit: 45	Yvonne Anglero	10/25/2021 10:01 AM	10/28/2021 12:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1892	Emergency	12 Duncan Terrace Unit: 12	Linda Welsh	10/26/2021 12:53 PM	11/18/2021 12:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1894	Emergency	18 Duncan Terrace Unit: 18	Gloria Morrison	10/27/2021 09:06 AM	10/28/2021 12:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1903	Emergency			11/10/2021 03:17 PM	11/17/2021 08:30 AM	\$0.00	\$0.00	\$0.00	\$0.00
1905	Emergency	30 Duncan Terrace Unit: 30	Joanne Rosen	11/15/2021 10:53 AM	11/18/2021 01:30 PM	\$0.00	\$0.00	\$0.00	\$0.00
1906	Emergency	33 Duncan Terrace Unit: 33	Rochelle Harris	11/15/2021 10:55 AM	11/16/2021 09:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1908	Emergency	22 Duncan Terrace Unit: 22	Claire Connelly	11/15/2021 11:44 AM	11/18/2021 05:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
1915	Emergency	35 Duncan Terrace Unit: 35	Paul Green	11/17/2021 08:34 AM	12/03/2021 03:30 PM	\$0.00	\$0.00	\$0.00	\$0.00
1934	Emergency	26 Duncan Terrace Unit: 26	Suzanne Rowe-Heidebrecht	11/23/2021 11:56 AM	11/30/2021 03:00 PM	\$0.00	\$0.00	\$0.00	\$0.00

W/O #	Priority	Unit Address	Tenant Name	Created Date	Completed Date	Mat.	Labor	Actual	Billed
Program: MA State 667									
Project: 667-1 Duncan Terrace									
1935	Emergency	42 Duncan Terrace Unit: 42	Helen Mason	11/23/2021 11:57 AM	12/01/2021 03:30 PM	\$0.00	\$0.00	\$0.00	\$0.00
1949	Emergency	38 Duncan Terrace Unit: 38	Jose Duran	11/30/2021 08:56 AM	11/30/2021 09:30 AM	\$0.00	\$0.00	\$0.00	\$0.00
1950	Emergency	33 Duncan Terrace Unit: 33	Rochelle Harris	11/30/2021 09:04 AM	12/01/2021 10:30 AM	\$0.00	\$0.00	\$0.00	\$0.00
1951	Emergency	21 Duncan Terrace Unit: 21	Joan Hubbard	11/30/2021 09:27 AM	12/01/2021 08:30 AM	\$0.00	\$0.00	\$0.00	\$0.00
1961	Emergency	35 Duncan Terrace Unit: 35	Paul Green	12/01/2021 01:51 PM	12/02/2021 11:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1963	Emergency	30 Duncan Terrace Unit: 30	Joanne Rosen	12/02/2021 11:41 AM	12/02/2021 06:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
1970	Emergency	36 Duncan Terrace Unit: 36	Christine Dixon	12/07/2021 09:58 AM	12/10/2021 09:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1975	Emergency	37 Duncan Terrace Unit: 37	Cynthia Tennant	12/07/2021 03:08 PM	12/10/2021 08:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1977	Emergency	26 Duncan Terrace Unit: 26	Suzanne Rowe-Heidebrecht	12/07/2021 03:39 PM	12/08/2021 08:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1978	Emergency	36 Duncan Terrace Unit: 36	Christine Dixon	12/08/2021 10:10 AM	12/10/2021 09:30 AM	\$0.00	\$0.00	\$0.00	\$0.00
1981	Emergency	47 Duncan Terrace Unit: 47	Carol Barnes	12/08/2021 10:35 AM	12/10/2021 10:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1995	Emergency	47 Duncan Terrace Unit: 47	Carol Barnes	12/14/2021 09:37 AM	12/14/2021 10:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
2016	Emergency	46 Duncan Terrace Unit: 46	William Scanlan	12/21/2021 08:43 AM	12/22/2021 11:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
2025	Emergency	14 Duncan Terrace Unit: 14		12/27/2021 08:35 AM	12/28/2021 07:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
2030	Emergency	8 Duncan Terrace Unit: 8	Ann Marie Chamberlain	12/27/2021 11:24 AM	12/28/2021 12:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
2040	Emergency	28 Duncan Terrace Unit: 28	Ofelia Lancaster	01/03/2022 01:05 PM	01/03/2022 03:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
2052	Emergency	8 Duncan Terrace Unit: 8	Ann Marie Chamberlain	01/05/2022 12:22 PM	01/11/2022 10:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
2059	Emergency	22 Duncan Terrace Unit: 22	Claire Connelly	01/11/2022 01:09 PM	01/12/2022 12:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
2084	Emergency	36 Duncan Terrace Unit: 36	Christine Dixon	01/27/2022 03:16 PM	01/28/2022 12:29 PM	\$0.00	\$0.00	\$0.00	\$0.00
2089	Emergency	27 Duncan Terrace Unit: 27	Nancy Walsh	01/27/2022 03:21 PM	02/11/2022 10:30 AM	\$0.00	\$0.00	\$0.00	\$0.00
2092	Emergency	6 Duncan Terrace Unit: 6		01/28/2022 01:01 PM	01/28/2022 01:02 PM	\$0.00	\$0.00	\$0.00	\$0.00
2094	Emergency	30 Duncan Terrace Unit: 30	Joanne Rosen	01/30/2022 06:18 AM	01/30/2022 06:19 AM	\$0.00	\$0.00	\$0.00	\$0.00
2105	Emergency	8 Duncan Terrace Unit: 8	Ann Marie Chamberlain	02/01/2022 09:10 AM	02/03/2022 10:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
2115	Emergency	Building A		02/05/2022 01:22 PM	02/05/2022 01:23 PM	\$0.00	\$0.00	\$0.00	\$0.00
2116	Emergency	17 Duncan Terrace Unit: 17	Catherine Scanlan	02/06/2022 09:42 AM	02/06/2022 09:43 AM	\$0.00	\$0.00	\$0.00	\$0.00
2121	Emergency	24 Duncan Terrace Unit: 24	Maureen Morrison	02/07/2022 04:35 PM	02/07/2022 04:35 PM	\$0.00	\$0.00	\$0.00	\$0.00
2128	Emergency	30 Duncan Terrace Unit: 30	Joanne Rosen	02/12/2022 09:19 AM	02/12/2022 09:19 AM	\$0.00	\$0.00	\$0.00	\$0.00
2129	Emergency	30 Duncan Terrace Unit: 30	Joanne Rosen	02/12/2022 12:27 PM	02/12/2022 12:28 PM	\$0.00	\$0.00	\$0.00	\$0.00
2132	Emergency	37 Duncan Terrace Unit: 37	Cynthia Tennant	02/14/2022 09:17 AM	02/14/2022 10:26 AM	\$0.00	\$0.00	\$0.00	\$0.00
2137	Emergency			02/14/2022 01:22 PM	02/14/2022 01:30 PM	\$0.00	\$0.00	\$0.00	\$0.00

W/O #	Priority	Unit Address	Tenant Name	Created Date	Completed Date	Mat.	Labor	Actual	Billed
Program: MA State 667									
Project: 667-1 Duncan Terrace									
2142	Emergency	27 Duncan Terrace Unit: 27	Nancy Walsh	02/16/2022 09:30 AM	02/16/2022 09:39 AM	\$0.00	\$0.00	\$0.00	\$0.00
2149	Emergency	30 Duncan Terrace Unit: 30	Joanne Rosen	02/17/2022 09:00 AM	02/17/2022 09:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
2161	Emergency	18 Duncan Terrace Unit: 18	Gloria Morrison	02/24/2022 12:13 PM	02/24/2022 01:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
2200	Emergency	33 Duncan Terrace Unit: 33	Rochelle Harris	03/28/2022 10:51 AM	03/28/2022 02:30 PM	\$0.00	\$0.00	\$0.00	\$0.00
667-1 Duncan Terrace		Incomplete: 0		Complete: 83		\$0.00	\$0.00	\$0.00	\$0.00
Project: 667-2 Doherty Circle									
991	Emergency	17C Doherty Circle Unit: 17C	Margaret Himely	07/06/2021 09:09 AM	07/26/2021 12:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1003	Emergency	235B Doherty Circle Unit: 235B	Felix Polanco	07/07/2021 11:46 AM	07/16/2021 03:49 PM	\$0.00	\$0.00	\$0.00	\$0.00
1004	Emergency	49B Doherty Circle Unit: 49B	Carmela Picone	07/07/2021 02:25 PM	07/07/2021 03:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
1015	Emergency	41A Doherty Circle Unit: 41A	Gregg Bethune	07/12/2021 03:46 PM	07/14/2021 12:47 PM	\$0.00	\$0.00	\$0.00	\$0.00
1022	Emergency	49B Doherty Circle Unit: 49B	Carmela Picone	07/19/2021 09:51 AM	07/27/2021 12:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1028	Emergency	59B Doherty Circle Unit: 59B	Christopher Goodwin	07/22/2021 08:53 AM	07/27/2021 12:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1033	Emergency	51A Doherty Circle Unit: 51A	Hui-Tien Ly	07/26/2021 09:44 AM	07/27/2021 12:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1753	Emergency	41A Doherty Circle Unit: 41A	Gregg Bethune	08/19/2021 11:02 AM	08/20/2021 12:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
1768	Emergency	41D Doherty Circle Unit: 41D	Erin Cheever	08/25/2021 10:13 AM	08/31/2021 04:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
1770	Emergency	41A Doherty Circle Unit: 41A	Gregg Bethune	08/26/2021 10:34 AM	08/26/2021 02:17 PM	\$0.00	\$0.00	\$0.00	\$0.00
1774	Emergency	41A Doherty Circle Unit: 41A	Gregg Bethune	08/26/2021 01:53 PM	08/26/2021 02:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
1777	Emergency	9A Doherty Circle Unit: 9A	Donna Butts	08/30/2021 09:06 AM	08/31/2021 02:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
1779	Emergency	41D Doherty Circle Unit: 41D	Erin Cheever	08/30/2021 09:08 AM	08/30/2021 04:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
1786	Emergency			09/02/2021 12:24 PM	09/02/2021 04:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
1792	Emergency	9A Doherty Circle Unit: 9A	Donna Butts	09/07/2021 09:27 AM	09/07/2021 10:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1798	Emergency	51D Doherty Circle Unit: 51D	Mayra Gonzalez	09/08/2021 03:06 PM	09/13/2021 01:22 PM	\$0.00	\$0.00	\$0.00	\$0.00
1801	Emergency	1A Doherty Circle Unit: 1A	Nicolina Meere	09/09/2021 03:04 PM	09/09/2021 03:45 PM	\$0.00	\$0.00	\$0.00	\$0.00
1810	Emergency	33A Doherty Circle Unit: 33A	Connie Zimmerman	09/20/2021 10:59 AM	09/20/2021 12:22 PM	\$0.00	\$0.00	\$0.00	\$0.00
1819	Emergency	Building I		09/21/2021 02:28 PM	09/22/2021 08:00 AM	\$0.00	\$0.00	\$0.00	\$0.00

W/O #	Priority	Unit Address	Tenant Name	Created Date	Completed Date	Mat.	Labor	Actual	Billed
Program: MA State 667									
Project: 667-2 Doherty Circle									
1862	Emergency	51B Doherty Circle Unit: 51B	Aristeides Tziouvelis	10/14/2021 02:21 PM	10/18/2021 09:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1863	Emergency	41D Doherty Circle Unit: 41D	Erin Cheever	10/14/2021 02:22 PM	10/16/2021 02:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
1872	Emergency	243D Doherty Circle Unit: 243D	Paul Gray	10/18/2021 12:27 PM	10/19/2021 11:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1901	Emergency	17A Doherty Circle Unit: 17A	Melissa Turner	11/10/2021 12:29 PM	11/17/2021 11:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1904	Emergency	59C Doherty Circle Unit: 59C	Scott Maccallum	11/15/2021 08:49 AM	11/16/2021 10:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1924	Emergency	41C Doherty Circle Unit: 41C	Fernando Murga	11/22/2021 08:53 AM	11/30/2021 03:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
1928	Emergency	243C Doherty Circle Unit: 243C	Richard Desrosiers	11/23/2021 11:16 AM	11/30/2021 12:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
1936	Emergency	33B Doherty Circle Unit: 33B	Leslie Arillotta	11/23/2021 12:03 PM	11/30/2021 11:30 AM	\$0.00	\$0.00	\$0.00	\$0.00
1937	Emergency	25B Doherty Circle Unit: 25B	Charles Chapman	12/09/2021 12:04 PM	12/17/2021 11:30 AM	\$0.00	\$0.00	\$0.00	\$0.00
1938	Emergency	243B Doherty Circle Unit: 243B	Doris Smith	11/23/2021 12:13 PM	12/13/2021 10:30 AM	\$0.00	\$0.00	\$0.00	\$0.00
1939	Emergency	243A Doherty Circle Unit: 243A	Patricia Fallis	11/23/2021 12:13 PM	12/02/2021 03:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
1940	Emergency	235C Doherty Circle Unit: 235C	Volodymyr Avramenko	11/23/2021 12:15 PM	11/30/2021 12:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
1941	Emergency	235A Doherty Circle Unit: 235A	Robert Benson	11/23/2021 12:16 PM	11/29/2021 08:30 AM	\$0.00	\$0.00	\$0.00	\$0.00
1942	Emergency	17B Doherty Circle Unit: 17B	Gail Mac Gregor	11/23/2021 12:18 PM	12/10/2021 11:30 AM	\$0.00	\$0.00	\$0.00	\$0.00
1943	Emergency	59B Doherty Circle Unit: 59B	Christopher Goodwin	11/23/2021 12:27 PM	12/14/2021 02:45 PM	\$0.00	\$0.00	\$0.00	\$0.00
1944	Emergency	9B Doherty Circle Unit: 9B	Lucy Lally	11/23/2021 12:34 PM	11/30/2021 01:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
1945	Emergency	9D Doherty Circle Unit: 9D	Janice Barr	11/23/2021 12:35 PM	11/30/2021 12:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
1947	Emergency	59D Doherty Circle Unit: 59D	Noeleen Barry	11/24/2021 11:33 AM	12/03/2021 03:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
1948	Emergency	49D Doherty Circle Unit: 49D	Elizabeth Gordon	11/30/2021 08:34 AM	11/30/2021 11:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1959	Emergency	1A Doherty Circle Unit: 1A	Nicolina Meere	12/01/2021 09:04 AM	12/02/2021 08:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1974	Emergency	59D Doherty Circle Unit: 59D	Noeleen Barry	12/07/2021 03:07 PM	12/09/2021 03:30 PM	\$0.00	\$0.00	\$0.00	\$0.00
1982	Emergency	17A Doherty Circle Unit: 17A	Melissa Turner	12/08/2021 01:14 PM	12/09/2021 11:30 AM	\$0.00	\$0.00	\$0.00	\$0.00

W/O #	Priority	Unit Address	Tenant Name	Created Date	Completed Date	Mat.	Labor	Actual	Billed
Program: MA State 667									
Project: 667-2 Doherty Circle									
1990	Emergency	49D Doherty Circle Unit: 49D	Elizabeth Gordon	12/13/2021 09:38 AM	12/13/2021 03:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
1991	Emergency	9D Doherty Circle Unit: 9D	Janice Barr	12/13/2021 10:12 AM	12/14/2021 10:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1992	Emergency	49C Doherty Circle Unit: 49C	Suzanne Dingle	12/13/2021 10:36 AM	12/13/2021 03:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
1993	Emergency	243D Doherty Circle Unit: 243D	Paul Gray	12/13/2021 12:30 PM	12/13/2021 04:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
2013	Emergency	17A Doherty Circle Unit: 17A	Melissa Turner	12/20/2021 08:41 AM	12/21/2021 10:30 AM	\$0.00	\$0.00	\$0.00	\$0.00
2017	Emergency	51C Doherty Circle Unit: 51C	Isa Agalliu	12/21/2021 09:37 AM	12/23/2021 10:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
2019	Emergency	235A Doherty Circle Unit: 235A	Robert Benson	12/22/2021 12:02 PM	12/23/2021 09:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
2027	Emergency	17A Doherty Circle Unit: 17A	Melissa Turner	12/27/2021 09:23 AM	12/27/2021 10:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
2038	Emergency	41B Doherty Circle Unit: 41B	Stephanie Rusnak	01/03/2022 10:29 AM	01/03/2022 01:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
2056	Emergency	51C Doherty Circle Unit: 51C	Isa Agalliu	01/10/2022 11:30 AM	01/12/2022 02:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
2061	Emergency	59A Doherty Circle Unit: 59A	Ruth Ann Mclean	01/12/2022 09:34 AM	01/13/2022 09:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
2063	Emergency	51C Doherty Circle Unit: 51C	Isa Agalliu	01/12/2022 09:45 AM	01/12/2022 10:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
2064	Emergency	41D Doherty Circle Unit: 41D	Erin Cheever	01/12/2022 11:12 AM	01/12/2022 01:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
2065	Emergency	41A Doherty Circle Unit: 41A	Gregg Bethune	01/12/2022 11:13 AM	01/12/2022 01:30 PM	\$0.00	\$0.00	\$0.00	\$0.00
2088	Emergency	Building I		01/27/2022 03:20 PM	01/27/2022 03:26 PM	\$0.00	\$0.00	\$0.00	\$0.00
2090	Emergency	25D Doherty Circle Unit: 25D	Ronda Maitland	01/27/2022 06:35 PM	01/27/2022 06:35 PM	\$0.00	\$0.00	\$0.00	\$0.00
2109	Emergency	59A Doherty Circle Unit: 59A	Ruth Ann Mclean	02/02/2022 01:17 PM	02/02/2022 01:50 PM	\$0.00	\$0.00	\$0.00	\$0.00
2120	Emergency	49C Doherty Circle Unit: 49C	Suzanne Dingle	02/07/2022 11:07 AM	02/07/2022 12:01 PM	\$0.00	\$0.00	\$0.00	\$0.00
2147	Emergency	243D Doherty Circle Unit: 243D	Paul Gray	02/16/2022 02:06 PM	02/21/2022 09:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
2151	Emergency	49B Doherty Circle Unit: 49B		02/17/2022 10:28 AM	02/17/2022 10:29 AM	\$0.00	\$0.00	\$0.00	\$0.00
2152	Emergency	Building I		02/17/2022 10:30 AM	02/17/2022 11:28 AM	\$0.00	\$0.00	\$0.00	\$0.00
2160	Emergency	9A Doherty Circle Unit: 9A	Donna Butts	02/24/2022 12:12 PM	02/25/2022 12:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
667-2 Doherty Circle		Incomplete: 0		Complete: 63		\$0.00	\$0.00	\$0.00	\$0.00

W/O #	Priority	Unit Address	Tenant Name	Created Date	Completed Date	Mat.	Labor	Actual	Billed
MA State 667		Incomplete: 0		Complete: 146		\$0.00	\$0.00	\$0.00	\$0.00
Program: MA State 200									
Project: 200-1 Margaret M. Kelly Community									
992	Emergency	1 Cherry Court Unit: 1CC	Jocelyn Smith	07/06/2021 09:32 AM	07/06/2021 10:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
994	Emergency	47 Cherry Street Unit: 47CS	Deliz Marcelino	07/06/2021 09:35 AM	07/06/2021 10:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
999	Emergency	16 Cherry Court Unit: 16CC	John Cambece	07/03/2021 09:00 AM	07/03/2021 10:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1000	Emergency	1 Cherry Court Unit: 1CC	Jocelyn Smith	07/05/2021 09:01 AM	07/13/2021 10:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1007	Emergency	17 Cherry Street Unit: 17CS	Lisette Marte	07/08/2021 02:02 PM	07/08/2021 04:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
1009	Emergency	10 Cherry Court Unit: 10CC	Sherise Ross	07/08/2021 06:05 PM	07/27/2021 12:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1025	Emergency	15 Cherry Street Unit: 15CS	Jessica Javier	07/20/2021 08:50 AM	07/27/2021 12:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1034	Emergency	27 Cherry Street Unit: 27CS	Narcisa Melendez	07/26/2021 10:04 AM	07/27/2021 12:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1036	Emergency	4 Cherry Court Unit: 4CC	Leonid Pindrus	07/27/2021 11:25 AM	07/28/2021 12:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1039	Emergency	21 Cherry Street Unit: 21CS	Carolyn Espinal	07/28/2021 01:04 PM	08/04/2021 12:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1073	Emergency	15 Cherry Street Unit: 15CS	Jessica Javier	08/09/2021 11:34 AM	08/10/2021 12:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1090	Emergency	35 Cherry Street Unit: 35CS	Natasha King	08/16/2021 03:48 PM	08/16/2021 04:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
1762	Emergency	21 Cherry Street Unit: 21CS	Carolyn Espinal	08/23/2021 11:31 AM	08/25/2021 11:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1766	Emergency	51 Cherry Street Unit: 51CS	Rosa Romero	08/24/2021 11:00 AM	09/17/2021 12:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1767	Emergency	8 Cherry Court Unit: 8CC	Nicole Vousboukis	08/25/2021 09:06 AM	08/25/2021 04:08 PM	\$0.00	\$0.00	\$0.00	\$0.00
1791	Emergency	8 Cherry Court Unit: 8CC	Nicole Vousboukis	09/07/2021 09:24 AM	09/07/2021 08:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
1796	Emergency	14 Cherry Court Unit: 14CC	Tara Stanley	09/08/2021 01:22 PM	09/08/2021 02:30 PM	\$0.00	\$0.00	\$0.00	\$0.00
1803	Emergency	21 Cherry Street Unit: 21CS	Carolyn Espinal	09/13/2021 09:00 AM	09/13/2021 10:50 AM	\$0.00	\$0.00	\$0.00	\$0.00
1813	Emergency	5 Cherry Court Unit: 5CC	Howard Burns	09/20/2021 01:14 PM	09/20/2021 01:15 PM	\$0.00	\$0.00	\$0.00	\$0.00
1814	Emergency	31 Cherry Street Unit: 31CS	Yeimi Reynoso	09/20/2021 01:15 PM	09/20/2021 02:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
1817	Emergency	27 Cherry Street Unit: 27CS	Narcisa Melendez	09/21/2021 11:17 AM	10/05/2021 04:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
1835	Emergency	27 Cherry Street Unit: 27CS	Narcisa Melendez	09/29/2021 02:26 PM	10/28/2021 12:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1839	Emergency	14 Cherry Court Unit: 14CC	Tara Stanley	09/30/2021 11:32 AM	09/30/2021 02:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
1842	Emergency	3 Cherry Court Unit: 3CC	Leslie Anthos	10/04/2021 11:17 AM	10/05/2021 10:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1850	Emergency	45 Cherry Street Unit: 45CS	Tiffany Marsh	10/07/2021 10:34 AM	10/07/2021 02:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
1851	Emergency	37 Cherry Street Unit: 37CS	Cintia Ponciano	10/07/2021 10:37 AM	12/15/2021 11:15 AM	\$0.00	\$0.00	\$0.00	\$0.00
1855	Emergency	29 Cherry Street Unit: 29CS	Michelle Burns	10/12/2021 10:52 AM	10/12/2021 11:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1858	Emergency	21 Cherry Street Unit: 21CS	Carolyn Espinal	10/12/2021 10:58 AM	10/12/2021 12:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
1860	Emergency	25 Cherry Street Unit: 25CS	Ashle Sanon	10/13/2021 08:36 AM	10/14/2021 12:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
1864	Emergency	4 Cherry Court Unit: 4CC	Leonid Pindrus	10/14/2021 03:50 PM	11/22/2021 12:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1866	Emergency	16 Cherry Court Unit: 16CC	John Cambece	10/18/2021 09:10 AM	10/18/2021 09:30 AM	\$0.00	\$0.00	\$0.00	\$0.00

W/O #	Priority	Unit Address	Tenant Name	Created Date	Completed Date	Mat.	Labor	Actual	Billed
Program: MA State 200									
Project: 200-1 Margaret M. Kelly Community									
1868	Emergency	49 Cherry Street Unit: 49CS	Catherine Dupuis	10/18/2021 09:39 AM	11/18/2021 09:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1869	Emergency	43 Cherry Street Unit: 43CS	Robin Mannion	10/18/2021 11:57 AM	12/30/2021 10:30 AM	\$0.00	\$0.00	\$0.00	\$0.00
1870	Emergency	39 Cherry Street Unit: 39CS	Kerri Hernandez	10/18/2021 12:02 PM	11/18/2021 10:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1875	Emergency	27 Cherry Street Unit: 27CS	Narcisa Melendez	10/18/2021 01:58 PM	12/07/2021 11:30 AM	\$0.00	\$0.00	\$0.00	\$0.00
1876	Emergency	25 Cherry Street Unit: 25CS	Ashle Sanon	10/18/2021 02:03 PM	10/21/2021 03:04 PM	\$0.00	\$0.00	\$0.00	\$0.00
1877	Emergency	21 Cherry Street Unit: 21CS	Carolyn Espinal	10/18/2021 02:04 PM	11/18/2021 02:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
1879	Emergency	15 Cherry Street Unit: 15CS	Jessica Javier	10/18/2021 02:20 PM	12/14/2021 01:30 PM	\$0.00	\$0.00	\$0.00	\$0.00
1882	Emergency	31 Cherry Street Unit: 31CS	Yeimi Reynoso	10/20/2021 10:51 AM	10/28/2021 12:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1883	Emergency	15 Cherry Street Unit: 15CS	Jessica Javier	10/21/2021 11:50 AM	10/21/2021 02:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
1885	Emergency	51 Cherry Street Unit: 51CS	Rosa Romero	10/25/2021 09:23 AM	10/28/2021 12:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1893	Emergency	31 Cherry Street Unit: 31CS	Yeimi Reynoso	10/26/2021 01:26 PM	10/28/2021 12:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1902	Emergency	5 Cherry Court Unit: 5CC	Howard Burns	11/10/2021 01:02 PM	11/15/2021 12:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1907	Emergency	17 Cherry Street Unit: 17CS	Lisette Marte	11/15/2021 11:41 AM	11/16/2021 08:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1909	Emergency	8 Cherry Court Unit: 8CC	Nicole Vousboukis	11/15/2021 11:50 AM	11/19/2021 11:30 AM	\$0.00	\$0.00	\$0.00	\$0.00
1911	Emergency	6 Cherry Court Unit: 6CC	Christine Bagnera	11/15/2021 12:21 PM	11/23/2021 03:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
1916	Emergency	12 Cherry Court Unit: 12CC	Linda Reny-Godin	11/17/2021 08:35 AM	11/18/2021 10:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1923	Emergency	17 Cherry Street Unit: 17CS	Lisette Marte	11/22/2021 08:52 AM	11/22/2021 11:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1930	Emergency	4 Cherry Court Unit: 4CC	Leonid Pindrus	11/23/2021 11:28 AM	01/22/2022 10:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1931	Emergency	8 Cherry Court Unit: 8CC	Nicole Vousboukis	11/23/2021 11:32 AM	01/25/2022 02:30 PM	\$0.00	\$0.00	\$0.00	\$0.00
1932	Emergency	16 Cherry Court Unit: 16CC	John Cambece	11/23/2021 11:35 AM	11/30/2021 11:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
1933	Emergency	17 Cherry Street Unit: 17CS	Lisette Marte	11/23/2021 11:37 AM	12/01/2021 01:30 PM	\$0.00	\$0.00	\$0.00	\$0.00
1967	Emergency	21 Cherry Street Unit: 21CS	Carolyn Espinal	12/06/2021 03:09 PM	12/07/2021 04:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
1988	Emergency	15 Cherry Court Unit: 15CC	Jazmin Fernandez	12/09/2021 01:56 PM	12/10/2021 11:30 AM	\$0.00	\$0.00	\$0.00	\$0.00
2012	Emergency	37 Cherry Street Unit: 37CS	Cintia Ponciano	12/16/2021 02:24 PM	12/23/2021 09:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
2018	Emergency	6 Cherry Court Unit: 6CC	Christine Bagnera	12/21/2021 10:02 AM	12/23/2021 08:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
2028	Emergency	21 Cherry Street Unit: 21CS	Carolyn Espinal	12/27/2021 09:40 AM	12/28/2021 01:45 PM	\$0.00	\$0.00	\$0.00	\$0.00
2029	Emergency	15 Cherry Street Unit: 15CS	Jessica Javier	12/27/2021 10:28 AM	12/28/2021 10:30 AM	\$0.00	\$0.00	\$0.00	\$0.00
2041	Emergency	47 Cherry Street Unit: 47CS	Deliz Marcelino	01/03/2022 03:29 PM	01/04/2022 01:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
2057	Emergency	16 Cherry Court Unit: 16CC	John Cambece	01/10/2022 12:38 PM	01/11/2022 08:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
2066	Emergency	27 Cherry Street Unit: 27CS	Narcisa Melendez	01/12/2022 11:34 AM	01/13/2022 11:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
2074	Emergency	9 Cherry Court Unit: 9CC	Beverly Underwood	01/19/2022 11:43 AM	01/19/2022 12:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
2077	Emergency	31 Cherry Street Unit: 31CS	Yeimi Reynoso	01/24/2022 11:45 AM	01/24/2022 12:12 PM	\$0.00	\$0.00	\$0.00	\$0.00
2091	Emergency	9 Cherry Court Unit: 9CC	Beverly Underwood	01/28/2022 12:56 PM	01/28/2022 12:57 PM	\$0.00	\$0.00	\$0.00	\$0.00

W/O #	Priority	Unit Address	Tenant Name	Created Date	Completed Date	Mat.	Labor	Actual	Billed
Program: MA State 200									
Project: 200-1 Margaret M. Kelly Community									
2095	Emergency	17 Cherry Street Unit: 17CS	Lisette Marte	01/30/2022 06:20 AM	01/30/2022 10:19 AM	\$0.00	\$0.00	\$0.00	\$0.00
2096	Emergency	8 Cherry Court Unit: 8CC	Nicole Vousboukis	01/30/2022 06:23 AM	01/30/2022 09:44 AM	\$0.00	\$0.00	\$0.00	\$0.00
2097	Emergency	21 Cherry Street Unit: 21CS	Carolyn Espinal	01/30/2022 06:24 AM	01/30/2022 06:26 AM	\$0.00	\$0.00	\$0.00	\$0.00
2098	Emergency	35 Cherry Street Unit: 35CS	Natasha King	01/30/2022 06:24 AM	01/30/2022 06:25 AM	\$0.00	\$0.00	\$0.00	\$0.00
2102	Emergency	45 Cherry Street Unit: 45CS	Tiffany Marsh	01/31/2022 02:07 PM	01/31/2022 02:07 PM	\$0.00	\$0.00	\$0.00	\$0.00
2104	Emergency	47 Cherry Street Unit: 47CS	Deliz Marcelino	02/01/2022 08:50 AM	02/09/2022 01:00 PM	\$0.00	\$0.00	\$0.00	\$0.00
2106	Emergency	12 Cherry Court Unit: 12CC	Linda Reny-Godin	02/01/2022 02:31 PM	02/15/2022 12:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
2114	Emergency	37 Cherry Street Unit: 37CS	Cintia Ponciano	02/03/2022 07:05 PM	02/03/2022 07:06 PM	\$0.00	\$0.00	\$0.00	\$0.00
2127	Emergency	16 Cherry Court Unit: 16CC	John Cambece	02/12/2022 08:28 AM	02/12/2022 08:29 AM	\$0.00	\$0.00	\$0.00	\$0.00
2130	Emergency	47 Cherry Street Unit: 47CS	Deliz Marcelino	02/12/2022 09:20 PM	02/12/2022 09:21 PM	\$0.00	\$0.00	\$0.00	\$0.00
2131	Emergency	25 Cherry Street Unit: 25CS	Ashle Sanon	02/13/2022 03:35 PM	02/13/2022 03:36 PM	\$0.00	\$0.00	\$0.00	\$0.00
2141	Emergency	33 Cherry Street Unit: 33CS	Karen Garcia	02/15/2022 05:25 PM	02/15/2022 05:26 PM	\$0.00	\$0.00	\$0.00	\$0.00
2145	Emergency	37 Cherry Street Unit: 37CS	Deliz Marcelino	02/16/2022 01:56 PM	02/18/2022 08:30 AM	\$0.00	\$0.00	\$0.00	\$0.00
2201	Emergency	31 Cherry Street Unit: 31CS	Yeimi Reynoso	03/28/2022 10:57 AM	03/28/2022 03:30 PM	\$0.00	\$0.00	\$0.00	\$0.00
200-1 Margaret M. Kelly Community			Incomplete: 0	Complete: 78		\$0.00	\$0.00	\$0.00	\$0.00
MA State 200			Incomplete: 0	Complete: 78		\$0.00	\$0.00	\$0.00	\$0.00
Program: MA State 689									
Project: 689-1 Ryan Place									
2081	Emergency	Handicapped Housing		01/26/2022 12:09 PM	01/28/2022 09:00 AM	\$0.00	\$0.00	\$0.00	\$0.00
689-1 Ryan Place			Incomplete: 0	Complete: 1		\$0.00	\$0.00	\$0.00	\$0.00
MA State 689			Incomplete: 0	Complete: 1		\$0.00	\$0.00	\$0.00	\$0.00
Grand Totals:			Incomplete: 0	Complete: 225		\$0.00	\$0.00	\$0.00	\$0.00

Swampscott Housing Authority Deferred Work Order Report

Filter Criteria Includes: 1) Project: All Projects, 2) Deferred Type: Deferred Maintenance Plan, 3) Deferred Note: N/A, 4) Completed: 7/1/2021 to 4/5/2022

Work Order Number	Completed Date/Time	Deferred Note	Deferred Type
1864	11/22/2021 12:00 AM	Waiting	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 09/30/2021. It also shows the approved budget for the current year (2022) 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.

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 Swampscott Housing Authority operating reserve at the end of fiscal year 2021 was \$143,329.00, which is 38.8% 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 Swampscott Housing Authority.						
REVENUE						
Account Number	Account Class	2021 Approved Revenue Budget	2021 Actual Amounts Received	2022 Approved Revenue Budget	% Change from 2021 Actual to 2022 Budget	2022 Dollars Budgeted per Unit per Month
3110	Shelter Rent - Tenants	\$578,280.00	\$582,482.00	\$617,088.00	5.9%	\$428.53
3111	Shelter Rent - Tenants - Fraud/Retroactive	\$0.00	\$0.00	\$0.00	0%	\$0.00
3115	Shelter Rent - Federal Section 8	\$0.00	\$0.00	\$0.00	0%	\$0.00
3190	Nondwelling Rentals	\$0.00	\$0.00	\$0.00	0%	\$0.00
3400	Administrative Fee - MRVP	\$0.00	\$0.00	\$0.00	0%	\$0.00
3610	Interest on Investments - Unrestricted	\$150.00	\$209.00	\$210.00	0.5%	\$0.15
3611	Interest on Investments - Restricted	\$0.00	\$0.00	\$0.00	0%	\$0.00
3690	Other Revenue	\$4,300.00	\$4,157.00	\$4,200.00	1%	\$2.92
3691	Other Revenue - Retained	\$0.00	\$428.00	\$21,000.00	4806.5%	\$14.58
3692	Other Revenue - Operating Reserves	\$0.00	\$0.00	\$0.00	0%	\$0.00
3693	Other Revenue - Energy Net Meter	\$0.00	\$0.00	\$0.00	0%	\$0.00
3801	Operating Subsidy - DHCD (4001)	\$210,520.00	\$189,592.00	\$198,287.00	4.6%	\$137.70
3802	Operating Subsidy - MRVP Landlords	\$0.00	\$0.00	\$0.00	0%	\$0.00
3803	Restricted Grants Received	\$0.00	\$0.00	\$0.00	0%	\$0.00
3920	Gain/Loss From Sale/Disp. of Prop.	\$0.00	\$0.00	\$0.00	0%	\$0.00
3000	TOTAL REVENUE	\$793,250.00	\$776,868.00	\$840,785.00	8.2%	\$583.88

Consolidated Budget (400-1) for all state-aided 667 (Elderly), 200 (family), and 705 (scattered site family) developments owned by Swampscott Housing Authority.						
EXPENSES						
Account Number	Account Class	2021 Approved Expense Budget	2021 Actual Amounts Spent	2022 Approved Expense Budget	% Change from 2021 Actual to 2022 Budget.	2022 Dollars Budgeted per Unit per Month
4110	Administrative Salaries	\$99,527.00	\$92,867.00	\$127,580.00	37.4%	\$88.60
4120	Compensated Absences	\$0.00	\$10,984.00	\$0.00	-100%	\$0.00
4130	Legal	\$3,000.00	\$2,246.00	\$6,000.00	167.1%	\$4.17
4140	Members Compensation	\$4,300.00	\$3,976.00	\$4,500.00	13.2%	\$3.13
4150	Travel & Related Expenses	\$937.00	\$0.00	\$1,405.00	100%	\$0.98
4170	Accounting Services	\$8,755.00	\$8,760.00	\$9,098.00	3.9%	\$6.32
4171	Audit Costs	\$3,780.00	\$3,780.00	\$3,780.00	0%	\$2.63
4180	Penalties & Interest	\$0.00	\$398.00	\$0.00	-100%	\$0.00
4190	Administrative Other	\$21,872.00	\$21,961.00	\$29,862.00	36%	\$20.74
4191	Tenant Organization	\$0.00	\$0.00	\$720.00	100%	\$0.50
4100	TOTAL ADMINISTRATION	\$142,171.00	\$144,972.00	\$182,945.00	26.2%	\$127.05
4310	Water	\$65,000.00	\$71,891.00	\$75,000.00	4.3%	\$52.08
4320	Electricity	\$120,000.00	\$110,482.00	\$120,000.00	8.6%	\$83.33
4330	Gas	\$49,000.00	\$34,817.00	\$36,001.00	3.4%	\$25.00
4340	Fuel	\$0.00	\$0.00	\$0.00	0%	\$0.00
4360	Net Meter Utility Debit/Energy Conservation	\$0.00	\$0.00	\$0.00	0%	\$0.00
4390	Other	\$0.00	\$0.00	\$0.00	0%	\$0.00
4391	Solar Operator Costs	\$0.00	\$0.00	\$0.00	0%	\$0.00
4392	Net Meter Utility Credit (Negative Amount)	\$0.00	\$0.00	\$0.00	0%	\$0.00
4300	TOTAL UTILITIES	\$234,000.00	\$217,190.00	\$231,001.00	6.4%	\$160.42

Consolidated Budget (400-1) for all state-aided 667 (Elderly), 200 (family), and 705 (scattered site family) developments owned by Swampscott Housing Authority.						
EXPENSES						
Account Number	Account Class	2021 Approved Expense Budget	2021 Actual Amounts Spent	2022 Approved Expense Budget	% Change from 2021 Actual to 2022 Budget	2022 Dollars Budgeted per Unit per Month
4410	Maintenance Labor	\$138,895.00	\$108,841.00	\$140,820.00	29.4%	\$97.79
4420	Materials & Supplies	\$24,000.00	\$28,400.00	\$23,325.00	-17.9%	\$16.20
4430	Contract Costs	\$27,030.00	\$40,376.00	\$56,230.00	39.3%	\$39.05
4400	TOTAL MAINTENANCE	\$189,925.00	\$177,617.00	\$220,375.00	24.1%	\$153.04
4510	Insurance	\$31,074.00	\$29,210.00	\$31,225.00	6.9%	\$21.68
4520	Payment in Lieu of Taxes	\$1,296.00	\$1,408.00	\$1,296.00	-8%	\$0.90
4540	Employee Benefits	\$116,688.00	\$105,013.00	\$101,541.00	-3.3%	\$70.51
4541	Employee Benefits - GASB 45	\$0.00	\$11,704.00	\$0.00	-100%	\$0.00
4542	Pension Expense - GASB 68	\$0.00	\$0.00	\$0.00	0%	\$0.00
4570	Collection Loss	\$0.00	\$1,884.00	\$0.00	-100%	\$0.00
4571	Collection Loss - Fraud/Retroactive	\$0.00	\$0.00	\$0.00	0%	\$0.00
4580	Interest Expense	\$0.00	\$0.00	\$0.00	0%	\$0.00
4590	Other General Expense	\$0.00	\$0.00	\$0.00	0%	\$0.00
4500	TOTAL GENERAL EXPENSES	\$149,058.00	\$149,219.00	\$134,062.00	-10.2%	\$93.10
4610	Extraordinary Maintenance	\$44,718.00	\$57,695.00	\$43,777.00	-24.1%	\$30.40
4611	Equipment Purchases - Non Capitalized	\$1,000.00	\$4,751.00	\$15,000.00	215.7%	\$10.42
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	\$55,614.00	\$0.00	-100%	\$0.00
4600	TOTAL OTHER EXPENSES	\$45,718.00	\$118,060.00	\$58,777.00	-50.2%	\$40.82
4000	TOTAL EXPENSES	\$760,871.00	\$807,058.00	\$827,160.00	2.5%	\$574.42

Consolidated Budget (400-1) for all state-aided 667 (Elderly), 200 (family), and 705 (scattered site family) developments owned by Swampscott Housing Authority.						
SUMMARY						
Account Number	Account Class	2021 Approved Budget	2021 Actual Amounts	2022 Approved Budget	% Change from 2021 Actual to 2022 Budget	2022 Dollars Budgeted per Unit per Month
3000	TOTAL REVENUE	\$793,250.00	\$776,868.00	\$840,785.00	8.2%	\$583.88
4000	TOTAL EXPENSES	\$760,871.00	\$807,058.00	\$827,160.00	2.5%	\$574.42
2700	NET INCOME (DEFICIT)	\$32,379.00	\$-30,190.00	\$13,625.00	-145.1%	\$9.46
7520	Replacements of Equip. - Capitalized	\$0.00	\$0.00	\$0.00	0%	\$0.00
7540	Betterments & Additions - Capitalized	\$0.00	\$0.00	\$0.00	0%	\$0.00
7500	TOTAL NONOPERATING EXPENDITURES	\$0.00	\$0.00	\$0.00	0%	\$0.00
7600	EXCESS REVENUE OVER EXPENSES	\$32,379.00	\$-30,190.00	\$13,625.00	-145.1%	\$9.46

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 2021 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 Swampscott 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: Operational Guidance

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: Paused due to COVID-19

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

Rating: Operational Guidance

Criterion: Completion of mandatory online board member training

Rating: Corrective Action

Reason: There were 2 board members did not complete their training

Response: We will sign them up for another class

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

Rating: No Findings

Category: Financial

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

Rating: Paused due to COVID-19

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: Paused due to COVID-19

Category: Facility Management - Health & Safety

Criterion: Health and Safety Violations

DHCD has observed conditions at the LHA's developments and reported the following health and safety violations. The LHA has certified the number of corrected violations in each category.

	Number of violations cited	Number of violations corrected
Maintenance related violations	0	0
Tenant related violations	0	0

Category: Facility Management - Inspections

Criterion: LHA Conducted 100% of the Unit Inspections.

Rating: Paused due to COVID-19

Criterion: Inspection reports noted 100% of the necessary repairs in each unit.

Rating: Paused due to COVID-19

Criterion: 100% of inspection-related work orders were generated.

Rating: Paused due to COVID-19

Criterion: Work order system identifies, tracks, and can produce reports for inspection work orders.

Rating: Paused due to COVID-19

Criterion: Inspection work orders were completed within 30 calendar days from the date of inspection, OR if cannot be completed with 30 calendar days, are added to the Deferred Maintenance Plan or included in the Capital Improvement Plan in the case of qualifying capital repairs (unless health/safety issue).

Rating: Paused due to COVID-19

Category: Facility Management - Work Order System

Criterion: Emergency work orders defined per Property Management Guide, identified, tracked, reportable.

Rating: No Findings

Criterion: Emergency work orders initiated within 24-48 hours.

Rating: No Findings

Criterion: Vacancy work orders identified, tracked and reportable.

Rating: No Findings

Criterion: Vacancy work orders were completed within 30 calendar days or if not completed within that timeframe, LHA has a waiver.

Rating: No Findings

Criterion: Comprehensive Preventive Maintenance Program exists & preventive work orders identified, tracked, and reportable.

Rating: No Findings

Criterion: Routine work orders should be identified, tracked, reportable and competed regularly.

Rating: No Findings

Criterion: Requested work orders identified, tracked and reportable.

Rating: No Findings

Criterion: Requested work orders were completed in 14 calendar days from the date of tenant request or it not ocmpleted within that timeframe (and not a health or safety issue), the task was added and completed in a timely manner as a part of the Deferred Maintenance Plan and/or CIP.

Rating: Paused due to COVID-19

Category: Facility Management - Emergency Response System:

Criterion: Housing authorities has 24 Hour Emergency Response System, Distributed Emergency Definition to Residents, Staff, and Answering Service (if applicable).

Rating: No Findings

Explanation of PMR Criteria Ratings

CRITERION	DESCRIPTION
Management	
Occupancy Rate	<p>The rating is calculated using the following formula: (Total Number of Occupied units on Monthly Report divided by (Total Number of Units Minus Units that Received a Waiver Minus Number of Units Vacant less than 30 days on Monthly Report)</p> <ul style="list-style-type: none"> • “No Findings” : Occupancy Rate is at or above 98% • Operational Guidance: Occupancy rate is at 95% up to 97.9% • Corrective Action: Adjusted occupancy rate is less than 95%
Tenant Accounts Receivable (TAR)	<p>This criterion calculates the percentage of uncollected rent and related charges owed by starting with the amount reported by the LHA, as uncollected balances for the TAR (Account 1122 from the Balance Sheet) minus Normal Repayment Agreements* divided by Shelter (Tenant) Rent (account 3110 from the Operating Statement)</p> <ul style="list-style-type: none"> • “No Findings” : At or below 2% • “Operational Guidance”: More than 2% , but less than 5% • “Corrective Action”: 5% or more
Certifications and Reporting Submissions	<p>Housing authorities are required to submit 4 quarterly vacancy certifications by end of the month following quarter end; 4 quarterly operating statements and 4 Tenant Accounts Receivable (TAR) reports within 60 days of quarter end.</p> <ul style="list-style-type: none"> • “No Findings”: At least 11 of the required 12 reports were submitted and at least 9 were submitted on time. • “Operational Guidance”: Less than 11 of the required 12 reports were submitted and/or less than 9 were submitted on time.
Board Member Training	<p>Percentage of board members that have completed the mandatory online board member training.</p> <ul style="list-style-type: none"> • “No Findings” : 80% or more completed training • “Operational Guidance” : 60-79.9% completed training • “Corrective Action” : <60 % completed training
Annual Plan (AP) Submitted	<p>Housing authorities are required to submit an annual plan every year.</p> <ul style="list-style-type: none"> • “No Findings” =Submitted on time • “Operational Guidance” =Up to 45 days late • “Corrective Action” =More than 45 days late

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

CRITERION	DESCRIPTION
Health & Safety	
Health & safety violations	DHCD has observed conditions at the LHA's developments and reported health and safety violations. The LHA has certified the number of corrected violations in each category.
Facility Management - Inspections	
Unit Inspections Conducted	Housing authorities are required to conduct inspections of all their occupied units at least once a year <ul style="list-style-type: none"> • "No Findings": 100 % of sampled units had inspections conducted once during the year • "Corrective Action": Fewer than 100% of sample units were inspected during the year
Inspections Report	Housing authorities are required to note all of the deficiencies found during inspections <ul style="list-style-type: none"> • "No Findings": 100 % of deficiencies are noted on inspection report • "Corrective Action": Fewer than 100% of deficiencies are noted in inspection report
Inspection Work Order	Housing authorities are required to generate work orders for all deficiencies noted during inspections <ul style="list-style-type: none"> • "No Findings": 100 % of deficiencies noted on inspection reports generated work orders • "Corrective Action": Fewer than 100% of deficiencies noted on inspection reports generated work orders
Work Order System	Work order system identifies, tracks, and can produce reports for inspection work orders. <ul style="list-style-type: none"> • "No Findings": Inspection work orders are identified, tracked, and reportable • "Operational Guidance": Inspection work orders are not identified, and/or tracked, and/or reportable
Inspections Work Orders Completed	Inspection work orders were 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 included in the Capital Improvement Plan in the case of qualifying capital repairs (unless health/safety issue). <ul style="list-style-type: none"> • "No Findings": Sampled inspection work orders were completed within 30 days of inspection date or added to deferred maintenance plan and/or CIP • "Operational Guidance": Sampled inspection work orders were completed within 31 to 45 calendar days of inspection date and not added to deferred maintenance plan or CIP • "Corrective Action": Sampled inspection work orders were completed in over 45 calendar days of inspection date

CRITERION	DESCRIPTION
Facility Management – Work Order System	
Emergency Work Orders Properly Defined	<p>Emergency work orders should be defined per <u>Property Management Guide</u>, identified, tracked, reportable.</p> <ul style="list-style-type: none"> • “No Findings”: Emergency work orders defined per <u>Property Management Guide</u>, identified, tracked, reportable • “Operational Guidance”: Emergency work orders are not defined per <u>Property Management Guide</u>, and/or identified, and/or tracked, and/or reportable
Emergency Work Orders Initiation	<p>Emergency work orders should be initiated within 24 to 48 hours.</p> <ul style="list-style-type: none"> • “No Findings”: Emergency work orders initiated within 24-48 hours • “Corrective Action”: Emergency work orders not initiated within 24-48 hours
Vacancy Work Orders	<p>Vacancy work orders should be identified, tracked and reportable.</p> <ul style="list-style-type: none"> • “No Findings”: Vacancy work orders identified, tracked AND reportable • “Corrective Action”: Vacancy work orders are not identified, and/or tracked, and/or reportable
Vacancy Work Orders Completed	<p>Vacancy work orders should be completed within 30 calendar days or if not completed within that timeframe, LHA has a waiver.</p> <ul style="list-style-type: none"> • “No Findings”: Vacancy work orders are completed within 30 calendar days or if not completed within timeframe, LHA has a waiver • “Operational Guidance”: Vacancy work orders completed within 31-60 calendar days • “Corrective Action”: Vacancy work orders completed 61+ calendar days
Preventive Maintenance Program	<p>Housing authorities are required to maintain a comprehensive preventive maintenance program in which preventive work orders are identified, tracked, and reportable.</p> <ul style="list-style-type: none"> • “No Findings”: A comprehensive preventive maintenance program exists and work orders are identified, tracked and reportable • “Corrective Action”: A comprehensive preventive maintenance program does not exist OR work orders are not identified and/or tracked and/or reportable
Routine Work Orders	<p>Routine work orders should be identified, tracked, reportable and completed regularly.</p> <ul style="list-style-type: none"> • “No Findings”: Routine work orders identified, tracked, reportable and completed regularly • “Operational Guidance”: Routine work orders are not identified, and/or tracked and/or reportable, and/or completed regularly

CRITERION	DESCRIPTION
Requested Work Orders	<p>Requested work orders should be identified, tracked and reportable.</p> <ul style="list-style-type: none"> • “No Findings”: Requested work orders identified, tracked, reportable and completed regularly • “Operational Guidance”: Requested work orders are not identified and/or tracked and/or reportable, and or completed regularly
Requested Work Orders Completion	<p>Requested work orders should be 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 should be added and completed in a timely manner as a part of the Deferred Maintenance Plan and/or CIP.</p> <ul style="list-style-type: none"> • “No Findings”: Requested work orders are completed within 14 calendar days of tenant request OR added to deferred maintenance plan and/or CIP • “Operational Guidance”: Requested work orders are completed within 15-30 calendar days from the date of tenant request • “Corrective Action”: Requested work orders are completed in over 30 calendar days from the date of tenant request OR not completed
Emergency Response System	<p>Housing authorities should have a 24 Hour Emergency Response System and distribute Emergency Definition to Residents, Staff, and Answering Service (if applicable).</p> <ul style="list-style-type: none"> • “No Findings”: A 24-hour system for responding to emergencies exists AND definitions of emergencies have been distributed to staff, residents and answering service, if applicable • “Operational Guidance”: System exists, but no definition has been distributed • “Corrective Action”: Neither a system nor distributed definitions exist

Policies

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

Policy	Last Ratified by Board Vote	Notes
*Rent Collection Policy	11/12/2019	
*Personnel Policy	01/14/2020	
*Capitalization Policy	11/12/2019	
*Procurement Policy	01/22/2016	
*Grievance Policy	05/15/2013	
Smoking Policy	06/11/2019	
Pet Policy	02/13/2018	
Other – Define in the ‘Notes’ column	06/18/2020	Truck Policy
Sexual Harassment Policy	09/14/2021	
Other – Define in the ‘Notes’ column	09/14/2021	Covid 19 Vaccination Policy
Maintenance and Other Charges	09/14/2021	
Other – Define in the ‘Notes’ column	09/14/2021	Drug & Alcohol-Free Workplace Policy
Reasonable Accommodations Policy		We will address this at an upcoming board
Fair Housing Marketing Plan		We will address this at an upcoming board
Language Access Plan		We will address this at an upcoming board

* 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.

Policy	Last Ratified by Board Vote	Notes
--------	--------------------------------	-------

DHCD comment regarding the list of policies:

Swampscott HA has adopted a grievance procedure in 2013. Given the age of the adopted policy, the SHA should compare the policy to the current DHCD guidelines.

6.08: Grievance Procedures

(1) Existing Procedures to Remain in Effect until Amended or Replaced..... After April 21, 2017 each LHA shall compare the provisions of its grievance procedure(s) with the provisions of 760 CMR 6.08(4) and shall initiate measures in order to achieve material compliance with those provisions.

Waivers

AP-2023-Swampscott Housing Author-00611 has no current waivers from the regulations of the Department of Housing and Community Development (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 of the 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.

- LTO Letter
- Public Comments
- Cover sheet for tenant satisfaction surveys
- Tenant Satisfaction Survey 667 Program
- Performance Management Review

Executive Director - Irma Chez
Swampscott Housing Authority
6 Duncan Terrace
Swampscott, MA 01907

June 30, 2022

Dear Irma,

Thank you for taking the time to meet with us on Monday June 13th 2022, to discuss the 2023 Housing Authority Annual Plan and Budget. As was said at the meeting, some of our Tenant's Association members never even had an inkling that such a thing existed; let alone to be able to listen to and participate in the formulation. Since you have become a part of our little public housing community it has made us feel very differently about the SHA Administration, the Board of Directors and our place in the surrounding town. It's as if you have given us all the opportunity to finally really participate in our own housing choices and the reasons we have made them. We hope to be able to work with you, encourage you and support the decisions you have made that so deeply effect all of our residents.

Your overview of the coming year; the proposed maintenance and repairs; your Capital Improvement Plan; the ongoing connections you have made for us through the hiring of Layla Williams as our Resident Services Coordinator; all of your dealings with our vendors, the Select Board of the Town of Swampscott; Sean Fitzgerald, the Town Administrator and the 3rd Party Developers (Paradise/Winn) you have had to navigate through - as well as all of your interactions with DHCD; and your daily operating budget choices....have shown each resident here how very much you care for us and are working tirelessly on our behalf.

By next year, hopefully, we will have a better understanding of how everything works! However, in the meantime, your presentation and in-depth explanations are going to keep all of us on our toes. Thank you again for all you have done and all you continue to do for the Swampscott Housing Authority.

Sincerely,

Cynthia J. Tennant
Swampscott Senior Tenant's Association
SSTA
781-244-9009

Swampscott Housing Authority
Annual Plan Hearing

We had our Annual Plan Hearing on June 14th, 2022. There were no Public Comments.

Irma Chez
Executive Director

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 and in Fall 2021 and all of the family units in Fall 2020. We expect the remaining elderly/disabled units to be surveyed in Fall 2022.

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.

Swampscott Housing Authority

Chapter 667 Housing Summary 2019 - 2021

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

Fall 2019:

- Surveys were sent to 6955 housing units (Chapter 667). 3352 surveys were filled out and returned.

Fall 2021:

- Surveys were sent to 8350 housing units (Chapter 667). 3787 surveys were filled out and returned.
- In the **Swampscott Housing Authority**, surveys were sent to a total of **84** Swampscott housing units (Chapter 667); **44** surveys were completed.

This report provides some information about how the residents from the **Swampscott Housing Authority** who answered the survey responded. It compares their answers to those from residents in the entire state and to those from small LHAs in Northeastern Massachusetts. These small LHAs in Northeastern Massachusetts include: Bedford, Dracut, Essex, Georgetown, Hamilton, Haverhill, Lexington, Lowell, Manchester, Middleton, North Andover, Salisbury, Swampscott, Wakefield, West Newbury, and Wilmington.

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:

	Swampscott Housing Authority	Small LHAs in Northeast MA *	Entire State
Felt they were usually or always treated with courtesy and respect when they contacted management.....	91%	85%	84%
Knew the Executive Director held a meeting with residents.....	37%	48%	43%

* Small LHAs in Northeastern Massachusetts include: Bedford, Dracut, Essex, Georgetown, Hamilton, Haverhill, Lexington, Lowell, Manchester, Middleton, North Andover, Salisbury, Swampscott, Wakefield, West Newbury, and Wilmington.

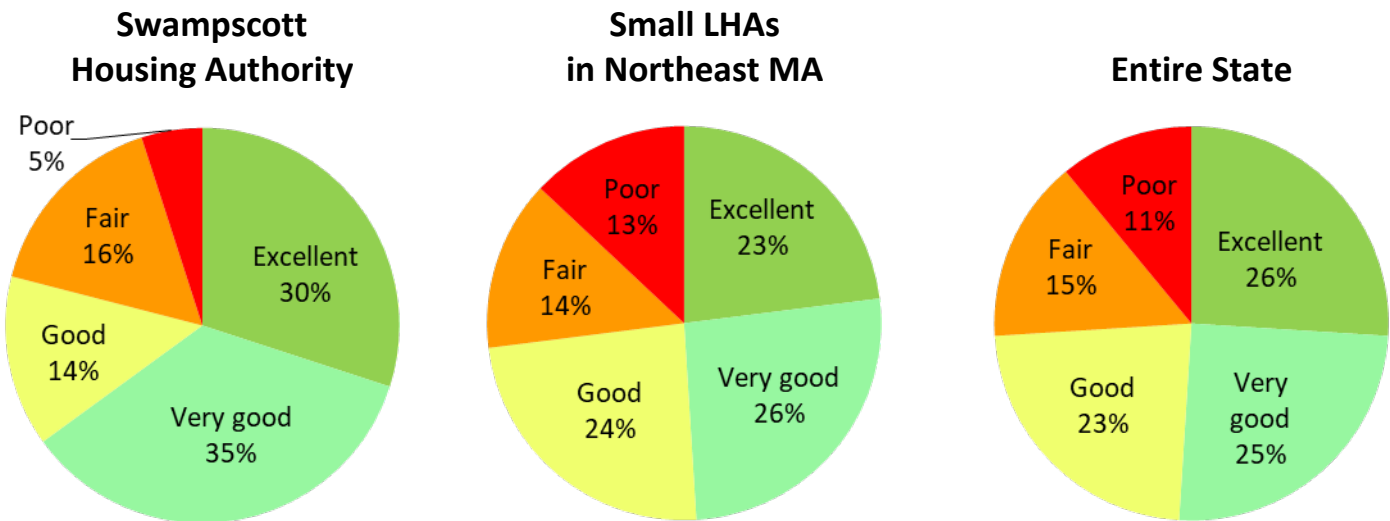
Maintenance and Repair

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

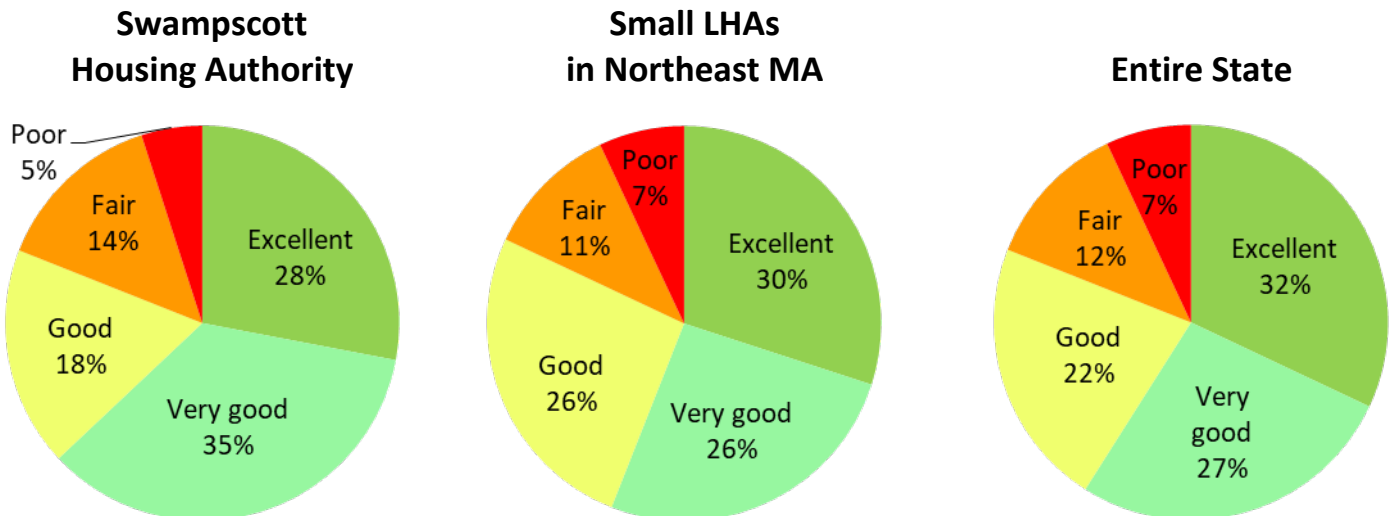
	Swampscott Housing Authority	Small LHAs in Northeast MA	Entire State
Felt they were treated with courtesy and respect when they contacted maintenance.....	79%	88%	88%
Were contacted by the Housing Authority before entering their apartment.....	86%	90%	91%

- 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 one quarter of respondents had a problem with their heating and about two thirds had a plumbing problem in the last 12 months.

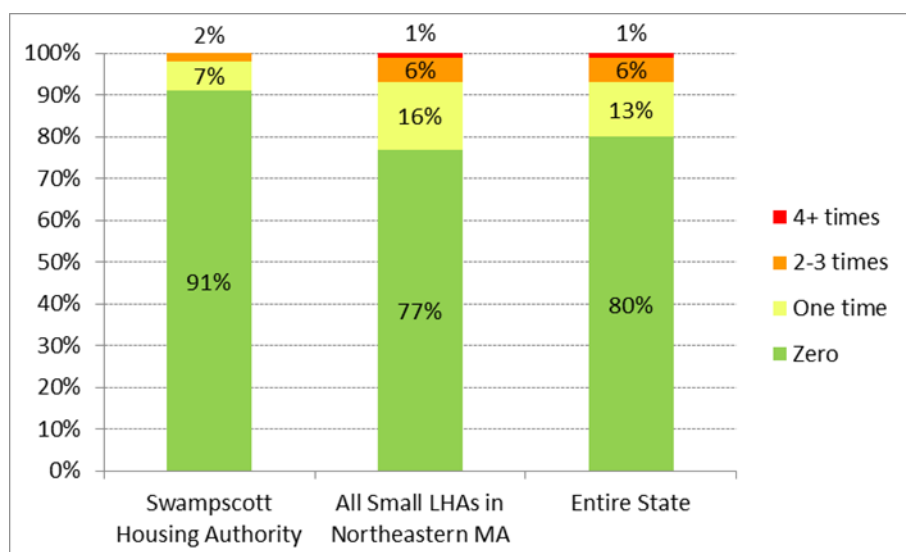
	Swampscott Housing Authority	Small LHAs in Northeast MA	Entire State
Had any heating problem.....	23%	39%	36%
Had any water problem.....	61%	58%	57%

- **Heating Problems**

How many times did residents completely lose heat?

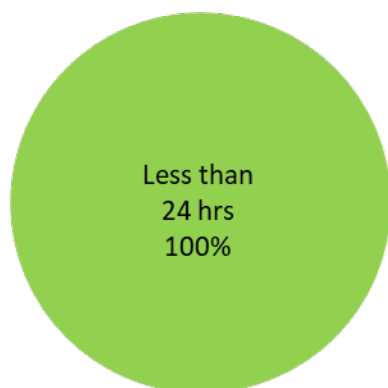
The chart below shows how many times respondents had completely lost heat in the last 12 months.

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.

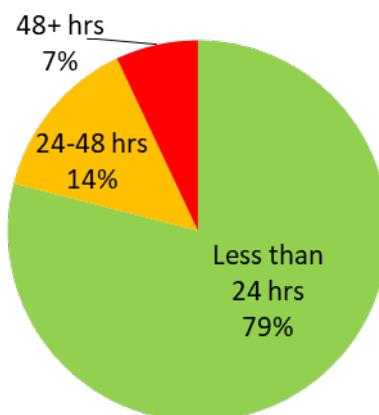


How long did it usually take for heat to come back on? For those respondents who reported completely losing heat, we asked how long it usually took for the heat to come back on – less than 24 hours, 24 - 48 hours, or more than 48 hours.

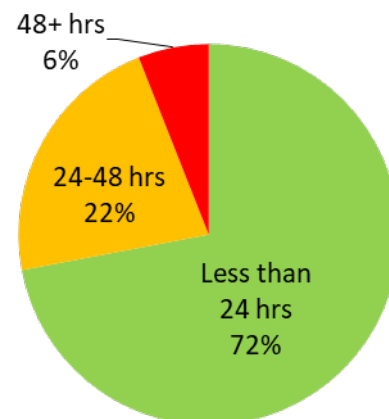
Swampscott Housing Authority



Small LHAs in Northeast MA



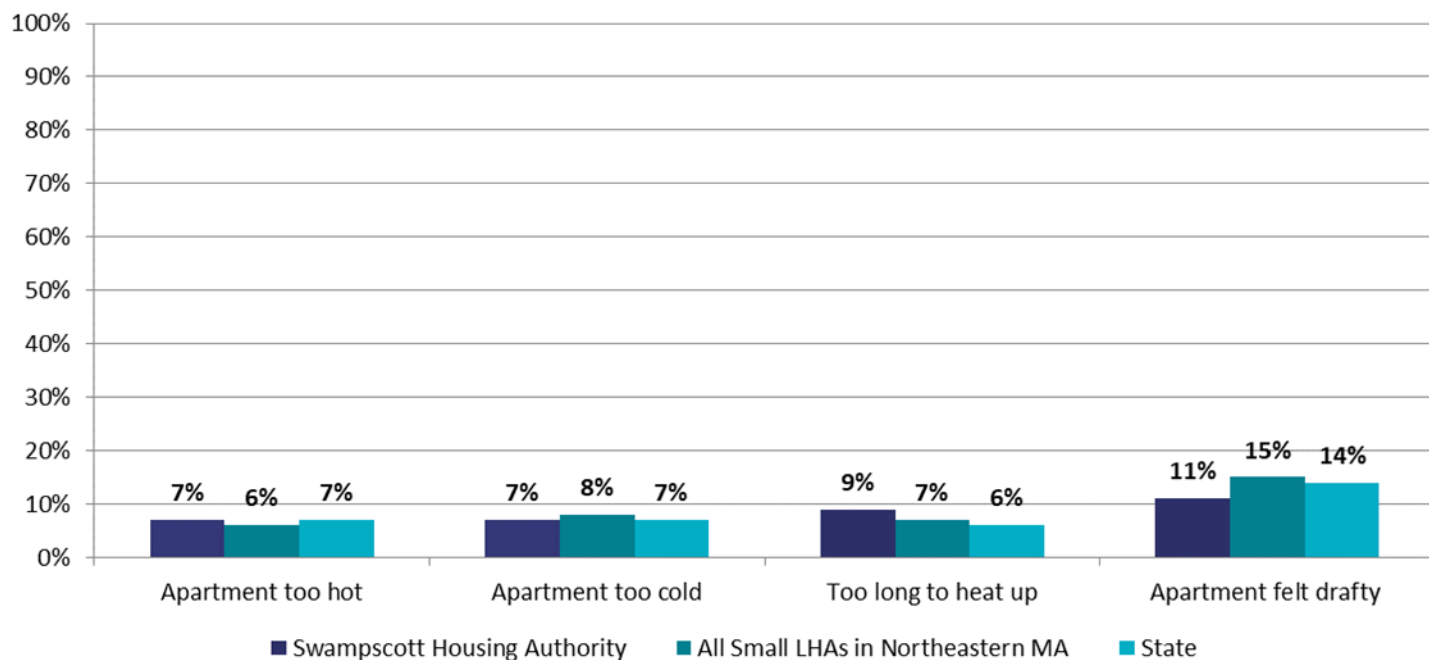
Entire State



- **Other Heating Problems**

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

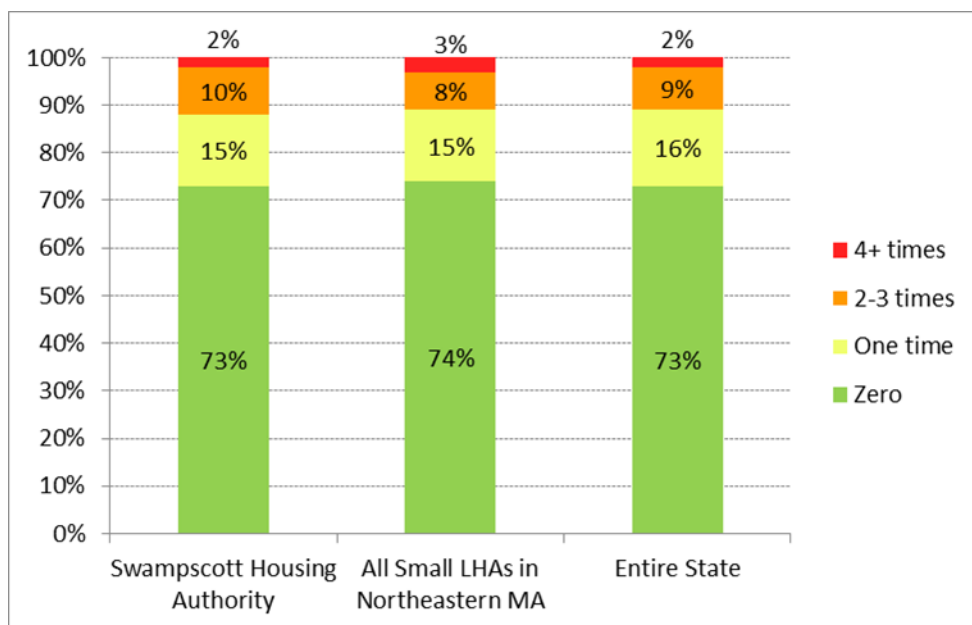
The chart below shows what percentage of residents experienced other heating problems in the last 12 months.



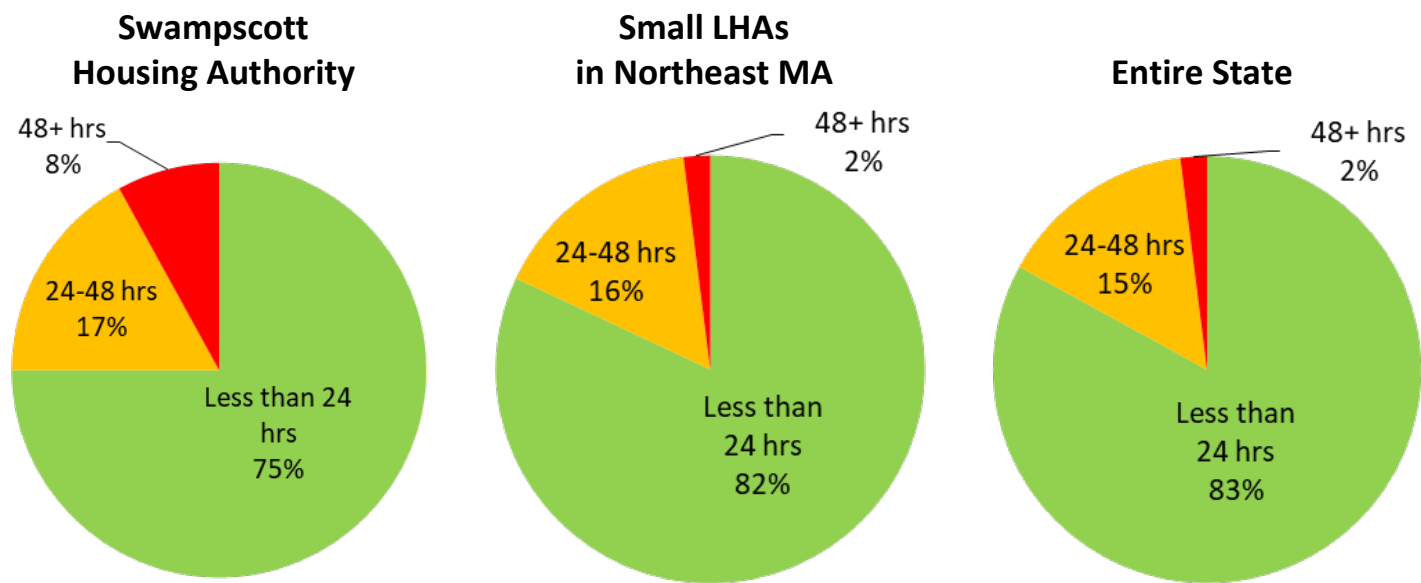
- **Water or Plumbing Problems**

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.

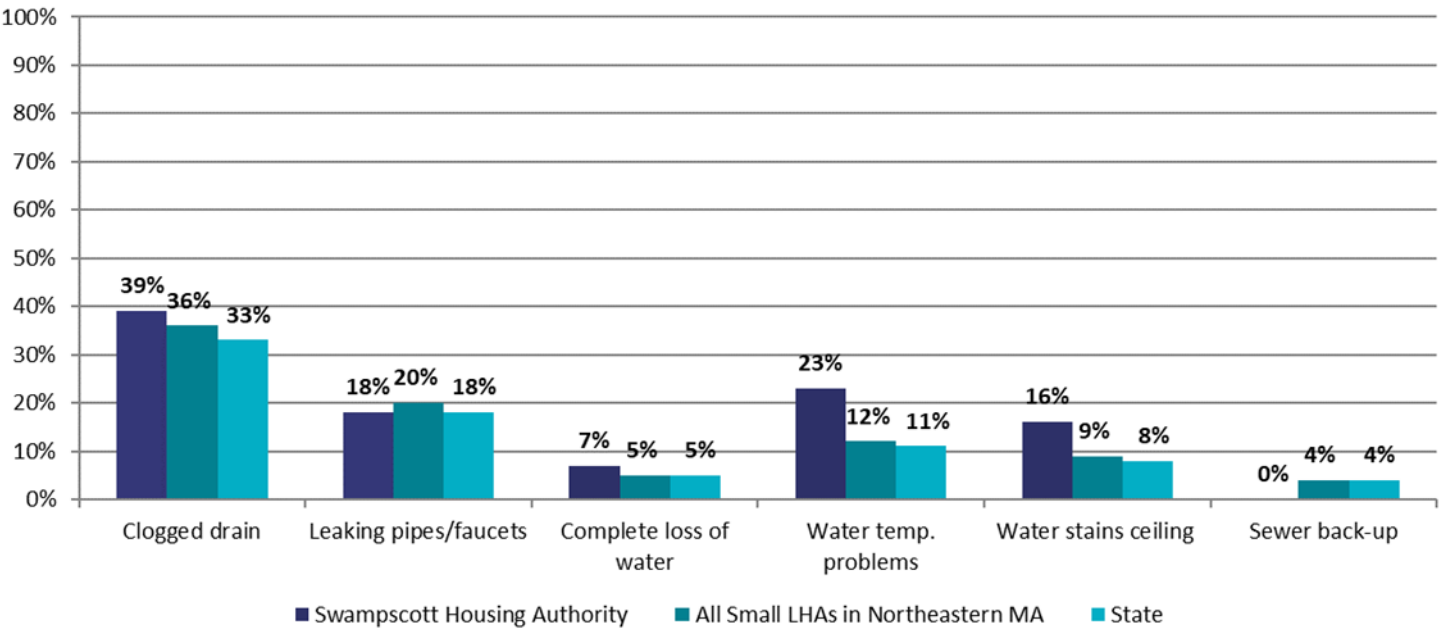


How long did it usually take for hot water to come back on? For those respondents who reported not having hot water in their apartment, we asked how long it usually took for hot water to come back on – less than 24 hours, 24 - 48 hours, or more than 48 hours.



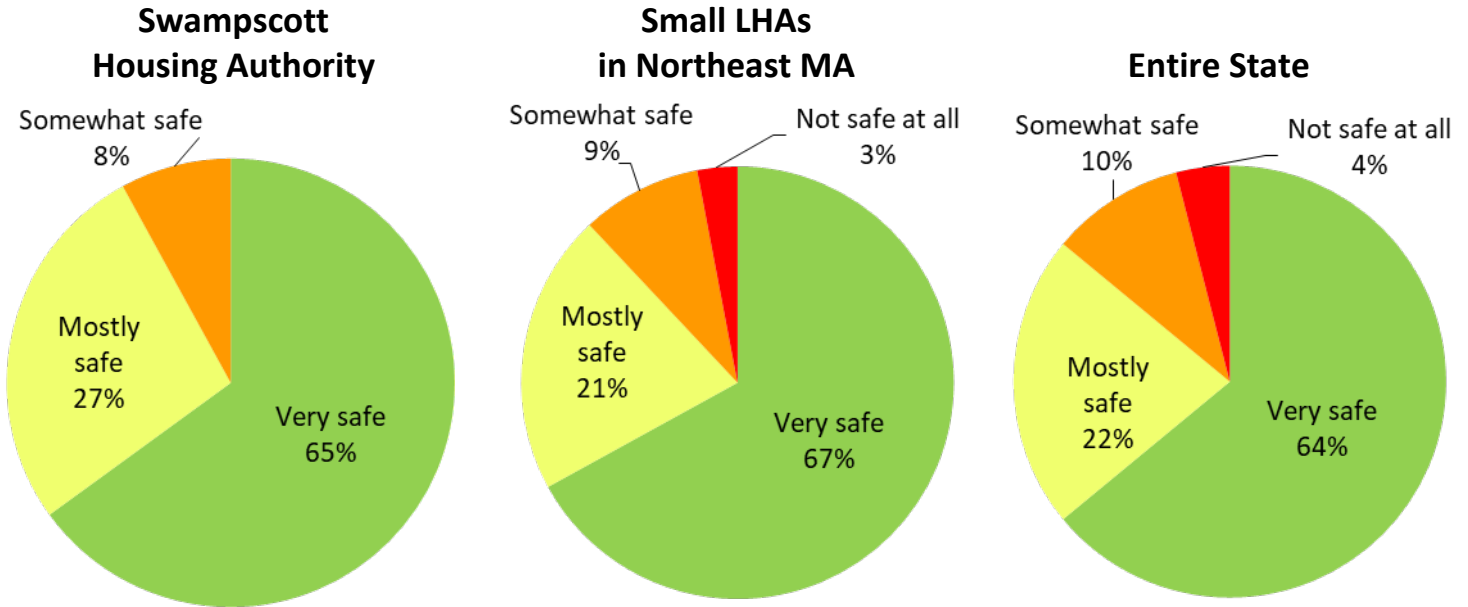
• **Other Water or Plumbing Problems**

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.

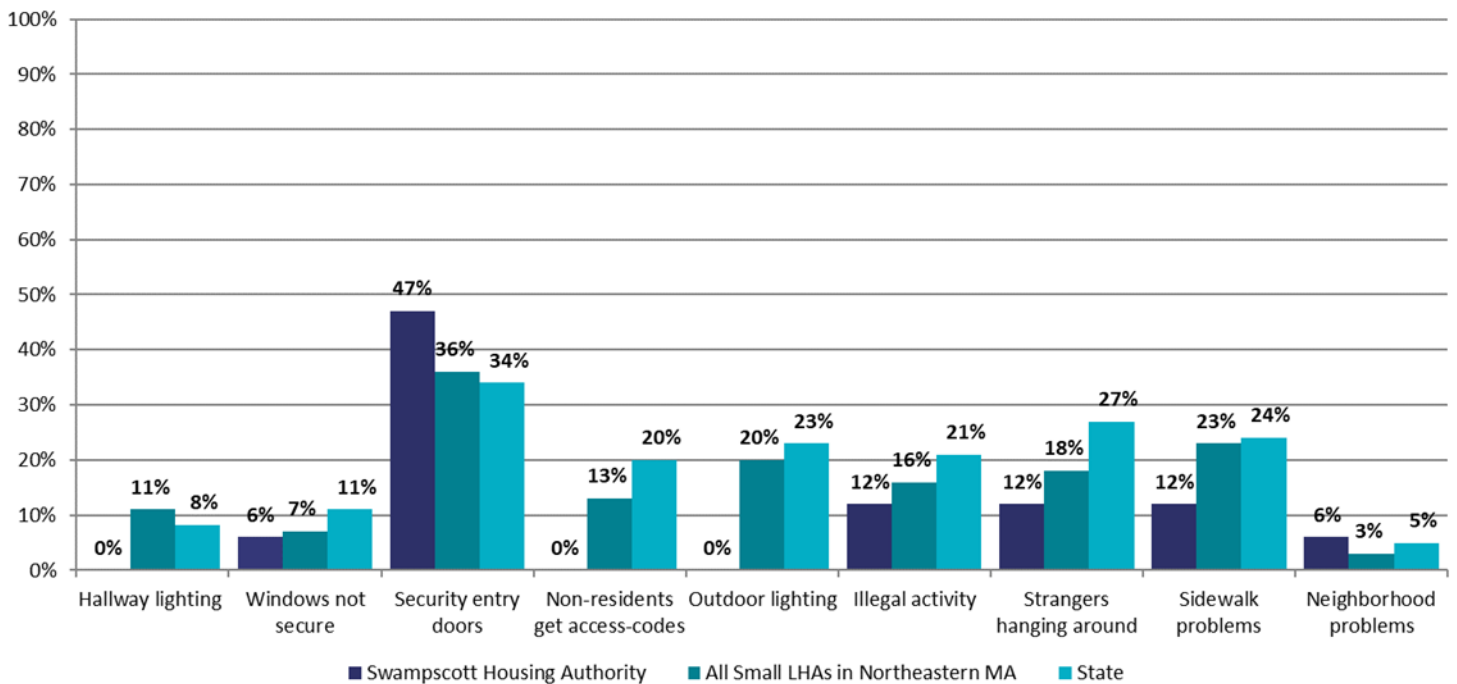


Safety

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.

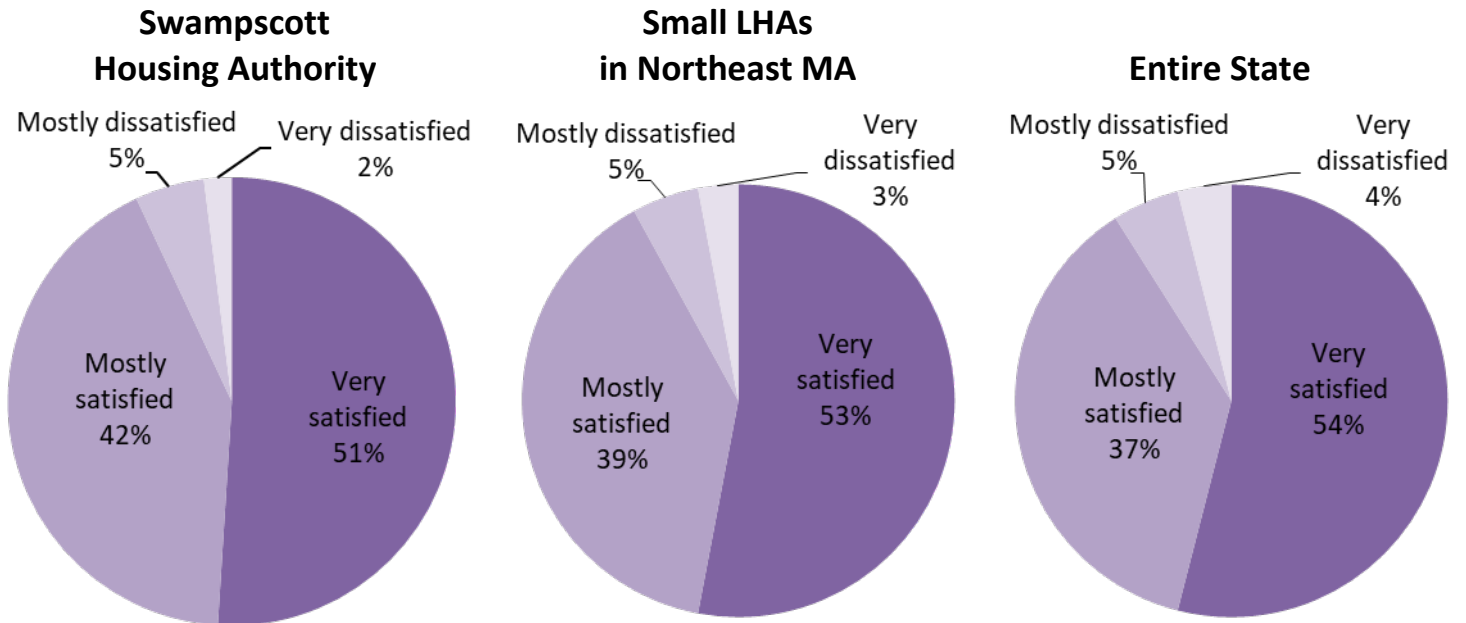


Reasons why respondents felt unsafe in their development: Respondents were asked why they felt unsafe in their development. This chart shows what specific concerns respondents mentioned.



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”.



SWAMPSCOTT HOUSING AUTHORITY

Performance Management Review (PMR) Report

Fiscal Year End 09/30/2021

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

Performance Management Review

DEPARTMENT OF HOUSING AND COMMUNITY DEVELOPMENT (DHCD) PMR Desk Audit Ratings Summary Official Published PMR Record For a detailed report of the Performance Management Review (PMR), please contact the Local Housing Authority				
Housing Authority	Swampscott Housing Authority			
Fiscal Year Ending	09/30/2021			
Housing Management Specialist	Melanie Loveland-Hale			
Facilities Management Specialist	Robert Garrett			
Criteria	Score/Rating			
	Management			
Occupancy Rate	c.667	c.705	c.200	Cumulative
	No Findings	Not Applicable	Operational Guidance	Operational Guidance
Tenant Accounts Receivable (TAR)	c.667	c.705	c.200	Cumulative
	Paused due to COVID-19	Not Applicable	Paused due to COVID-19	Paused due to COVID-19
Board Member Training	Corrective Action			
Certifications and Reporting Submissions	Operational Guidance			
Annual Plan	No Findings			
	Financial			
Adjusted Net Income	Paused due to COVID-19			
Operating Reserves	No Findings			
	Capital			
Capital Spending	Paused due to COVID-19			

Occupancy

Rating All: Operational Guidance

Rating 667: No Findings

Rating 200: Operational Guidance

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:

Certifications and Reporting Submissions

Rating: Operational Guidance

- ☒ 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:

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:**

Board Member Training

Rating: Corrective Action

- ☐ 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:**

Annual Plan Submission

Rating: No Findings

- ☐ Ensure you submit the Annual Plan on time.
- ☐ **Other:**

Performance Management Review

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

Housing Authority	Swampscott Housing Authority
Fiscal Year Ending	09/30/2021
Housing Management Specialist	Melanie Loveland-Hale
Facilities Management Specialist	Robert Garrett

Inspection and Work Order System Criteria	Rating
Inspections	
LHA conducted 100% of the unit inspections.	Paused due to COVID-19
Inspections report noted 100% of the necessary repairs in each unit.	Paused due to COVID-19
100% of inspection-related work orders were generated.	Paused due to COVID-19
Work order system identifies, tracks, and can produce reports for inspection work orders.	Paused due to COVID-19
Inspection work orders were 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 included in the Capital Improvement Plan in the case of qualifying capital repairs (unless health/safety issue).	Paused due to COVID-19
Work Order System	
Emergency work orders defined per PMG, identified, tracked, reportable.	No Findings
Emergency work orders initiated within 24 to 48 hours.	No Findings
Vacancy work orders identified, tracked and reportable.	No Findings
Vacancy work orders were completed within 30 calendar days or if not completed within that timeframe, LHA has a waiver.	No Findings
Comprehensive Preventive Maintenance Program exists & preventive work orders identified, tracked, and reportable.	No Findings
Routine work orders identified, tracked, reportable and completed regularly.	No Findings
Requested work orders are identified, tracked and reportable.	No Findings
Requested work orders were 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 was added and completed in a timely manner as a part of the Deferred Maintenance Plan and/or CIP.	Paused due to COVID-19
LHAs have a 24 hour system for responding to emergencies and have distributed definition of emergency to residents, staff and answering service (if applicable).	No Findings

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

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

Housing Authority	Swampscott Housing Authority
Fiscal Year Ending	9/30/2021
Housing Management Specialist	Melanie Loveland-Hale
Facilities Management Specialist	Robert Garrett

Health and Safety Violations. Must be initiated within 24 to 48 hours. If the box below is not checked, you did not have any health and safety violations.

☐ DHCD will provide a list of health and safety violations found. Inspection reports will be provided by your HMS. The health and safety items have an 'X' in the HS column of the inspection report. Actions to correct these violations must be initiated within 24 to 48 hours. When you have completed work orders for these items send documentation to dhcd-phinspectionviolations@massmail.state.ma.us. In the subject line please indicate the LHAName and the PMR Year. If health and safety violations are not resolved within 60 days, DHCD will follow-up with a second site visit.

Criteria A: LHA conducted 100% of the unit inspections - *Paused due to Covid*

- ☐ Look to a nearby LHA for help with inspections (formulate a management agreement)
- ☐ Attend a Regional DHCD-led Inspection Training (in person)
- ☐ Refer to Property Maintenance Guide - Chapter 3 on Inspections See Handout B
- ☐ Consider Organization of Staff (see Chapter 4 of PMG) See Handout B
- ☐ Develop/Improve internal organizational processes and procedures to ensure you are properly scheduling, tracking, and documenting inspections throughout the year.
- ☐ Consider software (web-based applications) or Excel/Access to help you conduct/track/document inspections See Handout H
- ☐ Schedule your inspections throughout the year (by development or by anniversary date), rather than once a year
- ☐ Hire a qualified contractor (contact the DHCD Compliance Specialist (#617-573-1100 or dhcd-publichousingprocurement@massmail.state.ma.us) for procurement information)

Additional Notes:

Criteria B: Inspection report noted 100% of the necessary repairs in each unit - *Paused due to Covid*

- ☐ Unable to make recommendations as did not notify tenants of possible inspections
- ☐ Attend a Regional DHCD-led Inspection Training (in person)
- ☐ Look into maintenance trainings offered by MAHAMS See Handout L
- ☐ Include tenant violations in inspection reports
- ☐ Review state sanitary code (https://www.mass.gov/files/documents/2016/07/pv/105cmr410_0.pdf)

Additional Notes:

Criteria C: 100% of inspection-related work orders were generated - *Paused due to Covid*

- ☐ Attend a Regional DHCD-led Inspection Training (in person)
- ☐ Refer to Property Maintenance Guide - Chapter 3 on Inspections See Handout B
- ☐ Ensure all tenant violations are included in the inspection report and that these violations are followed-up on by administrative staff with the tenant.
- ☐ Develop internal organizational processes and procedures to ensure you are properly generating and tracking inspection work orders throughout the year
- ☐ Improve internal organizational processes and procedures to ensure you are properly generating and tracking inspection work orders throughout the year
- ☐ Consider software (web-based applications) or Excel/Access to help you conduct/generate/track inspections See Handout H

Additional Notes:

Work Order System Identifies, Tracks, and Can Produce Reports for the Following

Criteria D: Inspection - *Paused due to Covid*

Criteria F: Emergency (defined per PMG) - *No Findings*

Criteria H: Vacancy - *No Findings*

Criteria K: Routine - *No Findings*

Criteria L: Requested - *No Findings*

- ☐ Consider software (web-based applications) or Excel/Access to help you generate/track/close out work orders See Handout H
- ☐ Refer to Property Maintenance Guide - Chapters 1 to 3 on Work Order Systems See Handout B
- ☐ Refer to PHN 2016-16 and 2016-36 and 2018-8 on Maintenance Aspects of Performance Management Review See Handout C+D
- ☐ Train staff on work order types and how to input them into your work order system/If you use web-based software, reach out to your vendor for training/training materials/changes to the software See Handout K + Software Handouts (M, N, or O) If Applicable
- ☐ LHA should align work order types, their priorities and a definition of what is considered an emergency with the Property Maintenance Guide (Pages I-5 to I-10) See Handout B + K
- ☐ Look to other LHAs with strong work order systems/processes and procedures around work orders and ask for their assistance
- ☐ Definition of Emergency Work Orders Should Be Conditions (no matter the time of day) which are immediately threatening to the life or safety of your residents, staff, or structures. LHA should create emergency list and distribute to staff and tenants. Produce emergency work orders for any work that is on list and initiate work within 24 to 48 hours. See Handout J
- ☐ LHA should establish a system of move out inspections for all vacant units. Produce work orders from those move out inspection reports, and list on work order time spent working on turnover, date turnover was started and date finished, list of work done, and material used.

Additional Notes:

Timely Completion of Work Order Types

Criteria E: Inspection - *Paused*

Criteria G: Emergency - *No Findings*

Criteria I: Vacancy - *No Findings*

Criteria M: Requested - *Paused*

- ☐ Consult DHCD's list of work order types, their priorities and a definition of what is considered an emergency See Handout J + K
- ☐ Refer to Property Maintenance Guide - Chapters 1 to 3 on Work Order Systems See Handout B
- ☐ Refer to PHNs 2016-16 and 2016-36 and 2018-8 on Maintenance Aspects of Performance Management Review See Handout C + D
- ☐ Vacancy turnovers should be completed within 30 calendar days or less. If cannot complete work within 30 days, LHA should contact Housing Management Specialist for a waiver. Use Online Vacancy System to Apply for Waivers (see PHN 2013 - 07) for Waiver Types (if waiver-eligible) See Handout G
- ☐ Consider Use of Capital Improvement Plan (CIP) for Capital Projects (see PHN 2012-22 for Capital vs. Operating funds; Contact Your Project Manager or RCAT for More Information) See Handout I
- ☐ Hire a qualified contractor (if plan to procure, contact DHCD Compliance Specialist (#617-573-1100 or dhcd-publichousingprocurement@massmail.state.ma.us) for procurement information
- ☐ Schedule your inspections throughout the year (by development or by anniversary date), rather than once a year
- ☐ Train staff on work order types and how to input them into your work order system/If you use web-based software, reach out to your vendor for training/training materials/changes to the software See Handout K + Software Handouts (M, N or O) If Applicable
- ☐ Consider software (web-based applications) or Excel/Access to help you generate/track/close out work orders See Handout H
- ☐ Consider Use of a Deferred Maintenance Plan/Operating Funds (Talk to Facilities Management Specialist and/or Housing Management Specialist)
- ☐ Look into Maintenance trainings offered by MAHAMS See Handout L
- ☐ Look into Dwelling Unit Inspection trainings offered by DHCD
- ☐ Look to other LHAs with strong work order systems/processes around work orders and ask for their assistance (possibly formulate a management agreement)
- ☐ Request Vacant Unit Funds (see PHN 2016-34 for more information) See Handout F
- ☐ Look for other external funding sources
- ☐ Build a broader vendor network (to ensure timely delivery of parts/materials)
- ☐ Consider Organization of Staff (see Chapter 4 of PMG) See Handout B

Additional Notes:

Emergency Work Order:

Vacancy Work Order:

Timeliness Requested Work Order:

Timeliness of Inspection Work Order:

Criteria J: Comprehensive Preventive Maintenance Program Exists + Preventive Work Orders Identified, Tracked, Reportable - No Findings

- ☐ Refer to the Property Maintenance Guide (Pages I-23 to I-32 and Pages 8-7 to 8-26) See Handout B
- ☐ Refer to Annual PHNs on this topic, latest of which was PHN 2016-18 "Preventive Maintenance Monthly Reminders" See Handout E
- ☐ Process to schedule, generate, prioritize, and track work orders as a part of the Preventive Maintenance Program (consider using software to automate processes where possible) See Handout H
- ☐ Designate one person with the responsibility of reviewing/updating the Preventive Maintenance Program on a regular basis, as well as in real-time as new equipment is purchased
- ☐ Create a Preventive Maintenance Program/Plan that helps in the upkeep of all buildings and equipment. Work orders should be created and closed for all items on Preventive Maintenance Plan; Consult the Property Maintenance Guide (Pages I-23 to I-32) and Public Housing Notices 2016 - 18 "Preventive Maintenance Reminders" for how to develop a Preventive Maintenance Program See Handout B
- ☐ Consider software (web-based applications) or Excel/Access to help you generate/track/close out work orders See Handout H
- ☐ Refer to Property Maintenance Guide - Chapters 1 to 3 on Work Order Systems See Handout B
- ☐ Refer to PHN 2016-16 and 2016-36 and 2018-8 on Maintenance Aspects of Performance Management Review See Handout C+D
- ☐ Train staff on work order types and how to input them into your work order system/If you use web-based software, reach out to your vendor for training/training materials/changes to the software See Handout K + Software Handouts (M, N, or O) If Applicable
- ☐ Look to other LHAs with strong work order systems/processes and procedures around work orders and ask for their assistance

Additional Notes:

Criteria N: 24 Emergency Response System, Distributed Emergency Definition to Residents, Staff, and Answering Service (if applicable) - No Findings

- ☐ Create an Emergency System that Is Available 24 Hours a Day (if plan to procure, contact DHCD Compliance Specialist (#617-573-1100 or dhcd-publichousingprocurement@massmail.state.ma.us))
- ☐ Refer to Property Maintenance Guide (Pages I-5 to I-10) on Emergencies and System Setup See Handout B
- ☐ LHA should create a list of emergency items and distribute to all staff, tenants and answering service if have one. Produce emergency work orders for any work that is on your emergency list and initiate work within 24 to 48 hours. See Handout J

Additional Notes: