

Overview and Certification

Agawam Housing Authority Annual Plan for Fiscal Year 2021 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 Board; 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 Local Housing Authority Board of Commissioners 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 Agawam Housing Authority's Annual Plan for their 2021 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. July Meeting Minutes show no Tenant Communication
 - b. Tenant Satisfaction Survey
 - c. 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
Total			52		242
667-02	Elderly	COLONIAL HAVEN 667-02	14	1966	52
667-01	Elderly	COUNTRY VIEW 667-01	8	1962	40
200-01	Family	J. J. BRADY VILLAGE 200-01	13	1948	32
200-02	Family	J. J. BRADY VILLAGE 200-02	3	0	12
667-03	Elderly	MEADOWBROOK MANOR 667-03	8	1977	64
667-04	Elderly	THE DANAHY SCHOOLHOUSE 667-04	2	1988	35
	Family	Family units in smaller developments	4		7

LHA Central Office

Agawam Housing Authority

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Maureen Cayer, Executive Director

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LHA Board of Commissioners

	<u>Role</u>	<u>Category</u>	<u>From</u>	<u>To</u>
Shelby Hall Gibbons	Chair		01/01/2019	01/01/2021
Sandra Hottin	Vice-Chair	Labor Appointee	01/01/2019	06/01/2021
Sarah Prince	Member	State Tenant Rep	01/01/2019	01/01/2021
Vincenzo Ronghi	Member	State Appointee	01/01/2019	01/01/2022
Lori Stickles	Treasurer		01/01/2019	01/01/2021

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.	06/01/2020
B.	Advertise the public hearing in public postings.	06/02/2020
C.	Notify all LTO's of the hearing and provide access to the Proposed Annual Plan.	N/A
D.	Post draft AP for tenant and public viewing.	06/02/2020
E.	Hold quarterly meeting with LTO to review the draft AP. (Must occur before the LHA Board reviews the Annual Plan.)	N/A
F.	Annual Plan Hearing. Hosted by the LHA Board, with a quorum of members present.	07/20/2020
G.	Executive Director presents the Annual Plan to the Board.	07/20/2020
H.	Board votes to approve the AP.	07/20/2020

Certification

CERTIFICATION FOR SUBMISSION OF THE ANNUAL PLAN

I, Maureen Cayer, Executive Director of the Agawam 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.

Date of certification: 08/25/2020

The Department of Housing and Community Development (DHCD) completed its review of this Annual Plan (AP) on September 14, 2020. 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)	\$1,494,098.06		Total of all FF awards minus prior FF spending
LHA Emergency Reserve	\$224,114.71		Amount to reserve for emergencies
Net FF Funds (First 3 Years of the CIP)	\$1,269,983.35	\$1,230,492.75	Funds to plan & amount actually planned in the first 3 years of the CIP
ADA Set-aside	\$9,620.43	\$9,620.43	Accessibility projects
DMH Set-aside	\$0.00	\$0.00	Dept. of Mental Health facility
DDS Set-aside	\$0.00	\$0.00	Dept. of Developmental Services facility
Unrestricted Formula Funding (FF)	\$1,260,362.92	\$1,220,872.32	Funds awarded by DHCD to be used on projects selected by the LHA and approved by DHCD.
Special DHCD Funding	\$117,296.12	\$117,296.12	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	\$1,387,279.47	\$1,347,788.86	Total of all anticipated funding available for planned projects and the total of planned spending.

Additional notes about funding:

AHA worked to secure funds through Community Development Block Grant to repair roofs at the family development. 9 of the 12 buildings will have new roofs.

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**

Agawam 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	fy2021 Spent	fy2021 Planned	fy2022	fy2023	fy2024	fy2025
005049	2008 FF Master CFA	COUNTRY VIEW 667-01	\$850	\$850	\$0	\$0	\$0	\$0	\$0	\$0
005089	FF: Stair Replacement entrance stairs	J. J. BRADY VILLAGE 200-02	\$92,540	\$81,815	\$0	\$10,725	\$0	\$0	\$0	\$0
005097	FF: Kitchen Remodel - Phase 1 (6 buildings)	COLONIAL HAVEN 667-02	\$18,381	\$18,381	\$0	\$0	\$0	\$0	\$0	\$0
005099	FF: Senior center community room upgrades	MEADOWBROOK MANOR 667-03	\$258,808	\$254,033	\$0	\$4,775	\$0	\$0	\$0	\$0
005107	FF: 34 Franklin St - Complete Rehab - VU funding request	WADE VILLAGE 705-01	\$11,682	\$0	\$0	\$11,682	\$0	\$0	\$0	\$0
005111	FF: Replace Bulkhead Door	MEADOWBROOK MANOR 667-03	\$7,500	\$3,200	\$0	\$4,300	\$0	\$0	\$0	\$0
005112	Replace Roofs thru CDBG	J. J. BRADY VILLAGE 200-01	\$135,086	\$0	\$0	\$80,772	\$54,314	\$0	\$0	\$0
005113	Replace Pressure Reducing Valves	COLONIAL HAVEN 667-02	\$10,755	\$9,567	\$0	\$1,188	\$0	\$0	\$0	\$0
005114	Replace Three (3) Roofs at Brady Village	J. J. BRADY VILLAGE 200-01	\$0	\$31,300	\$0	\$0	\$0	\$0	\$0	\$0
005115	Bathroom floor and shower project -Unit #7 Meadowbrook Manor	MEADOWBROOK MANOR 667-03	\$56,620	\$42,400	\$0	\$0	\$0	\$0	\$0	\$0

Capital Improvement Plan (CIP)

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

Cap Hub Project Number	Project Name	Development(s)	Total Cost	Amount Spent Prior to Plan	fy2021 Spent	fy2021 Planned	fy2022	fy2023	fy2024	fy2025
005116	Renovation of Common Lav to be Accessible	COUNTRY VIEW 667-01	\$42,830	\$19,800	\$0	\$23,030	\$0	\$0	\$0	\$0
005117	Walkway Repair Phase 2 Re-Paving	COUNTRY VIEW 667-01	\$37,080	\$2,500	\$0	\$34,580	\$0	\$0	\$0	\$0
005118	HC Entrance to Admin Building	MEADOWBROOK MANOR 667-03	\$62,538	\$10,240	\$0	\$52,298	\$0	\$0	\$0	\$0
005119	Windows	MEADOWBROOK MANOR 667-03	\$129,000	\$0	\$0	\$84,772	\$44,229	\$0	\$0	\$0
005120	Replace Asphalt Roof at "Old section"	THE DANAHY SCHOOLHOUSE 667-04	\$77,593	\$0	\$6,140	\$77,593	\$0	\$0	\$0	\$0
005121	Replace Boilers	THE DANAHY SCHOOLHOUSE 667-04	\$147,000	\$0	\$0	\$101,243	\$45,758	\$0	\$0	\$0
005123	Replace Combination Boilers	WADE VILLAGE 705-01	\$61,581	\$2,630	\$0	\$58,951	\$0	\$0	\$0	\$0
005124	New Roll in Shower Remodel	MEADOWBROOK MANOR 667-03	\$41,875	\$0	\$0	\$41,875	\$0	\$0	\$0	\$0
•	Replace Existing Federal Pacific Panels	COUNTRY VIEW 667-01	\$379,591	\$0	\$0	\$0	\$0	\$2,015	\$162,582	\$118,995
•	Install Bathroom Vents	COUNTRY VIEW 667-01	\$120,000	\$0	\$0	\$0	\$0	\$59,978	\$60,023	\$0
•	Replace VCT Floor	COUNTRY VIEW 667-01	\$21,013	\$0	\$0	\$0	\$0	\$0	\$21,013	\$0
•	Replace rotted entryway wood surround	COLONIAL HAVEN 667-02	\$70,200	\$0	\$0	\$70,200	\$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	fy2021 Spent	fy2021 Planned	fy2022	fy2023	fy2024	fy2025
•	ASHP for Administrative Offices	MEADOWBROOK MANOR 667-03	\$66,000	\$0	\$0	\$66,000	\$0	\$0	\$0	\$0
•	Replace Exterior Sidewalks	MEADOWBROOK MANOR 667-03	\$66,000	\$0	\$0	\$0	\$66,000	\$0	\$0	\$0
•	Replace Asphalt Parking Lot	THE DANAHY SCHOOLHOUSE 667-04	\$178,550	\$0	\$0	\$75,004	\$103,547	\$0	\$0	\$0
•	Electrical upgrades and lighting replacement	COUNTRY VIEW 667-01	\$235,685	\$0	\$0	\$0	\$0	\$0	\$0	\$199,331
•	Replace Siding and Windows	WADE VILLAGE 705-01	\$169,766	\$0	\$0	\$0	\$65,298	\$104,469	\$0	\$0
TOTALS			\$2,498,521	\$476,714	\$6,140	\$798,985	\$379,145	\$166,461	\$243,618	\$318,326

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
005099	FF: Senior center community room upgrades	Abestos removal	\$0	\$5,100	\$0	\$0	\$0	\$0	\$0	\$0
005115	Bathroom floor and shower project -Unit #7 Meadowbrook Manor		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$56,620
005116	Renovation of Common Lav to be Accessible	community room bathroom HP modifications - reasonable accommodation	\$0	\$42,830	\$0	\$0	\$0	\$0	\$0	\$0
005118	HC Entrance to Admin Building	HP improvements to LHA office entrance and doors	\$0	\$62,538	\$0	\$0	\$0	\$0	\$0	\$0
005124	New Roll in Shower Remodel	Roll in shower	\$0	\$41,875	\$0	\$0	\$0	\$0	\$0	\$0
•	Replace Existing Federal Pacific Panels		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$96,000
TOTALS			\$0	\$152,343	\$0	\$0	\$0	\$0	\$0	\$152,620

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.

Agawam Housing Authority has not submitted an Alternate CIP.

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.

Agawam Housing Authority has not requested additional funding.

3. Overall goals of the Housing Authority's CIP

The goal of the 2021 CIP Plan will be to Replace the combination boilers at Wade Village. A project that needs to get done by the Winter.

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:

No significant changes

5. Requirements of previous CIP approval

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

6. Quarterly capital reports

Our most recent quarterly capital report (form 80 and 90) was submitted on 04/16/2020.

7. Capital Planning System (CPS) updates

Our CPS facility data has been updated with current condition information, including changes resulting from projects completed in the past year, as of 01/15/2020.

8. Project priorities

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

9. High priority deficiencies

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

See Attached

10. Accessibility

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

11. Special needs development

Agawam Housing Authority does not have a special needs (167 or 689 programs) development.

12. Energy and water consumption

Our 12 most recent monthly energy reports are for months 6/2019 to 6/2020.

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

667-01

667-03

In an attempt to regulate the heat, programmable thermostats were installed Summer 2018. The results have been mixed.

13. Energy or water saving initiatives

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

14. Vacancy rate

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

2.6% c. 667 (DHCD Goal 2%)

9.1% c. 200 (DHCD Goal 2%)

0% c. 705 (DHCD Goal 2%)

Agawam Housing Authority will address the excess vacancies in the following manner:
CHAMP

15. Vacancies

Agawam Housing Authority has no units listed as vacant, proposed to be vacant, or at risk of becoming vacant.

CIP Approval For Agawam Housing Authority for FY 2021

Formula Funding Capital Improvement Plan (CIP), WorkPlan 5001

9/11/2020

Congratulations! The CIP-2021 submitted by Agawam Housing Authority is approved, subject to the following conditions:

- 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.

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

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

CPS Number	FISH #	Project Name	TDC Amount *	Other Funding	DHCD Staff Arch/ Eng	WO/RFS Date
005-667-02-0-17-1637	005125	Replace rotted entryway wood surround	\$70,200.00	\$0.00	JOLSEN	10/01/2020
005-667-03-008-19-550	005126	ASHP for Administrative Offices	\$66,000.00	\$0.00	Mdumit	10/01/2020
005-667-04-S01-19-549	005127	Replace Asphalt Parking Lot	\$178,550.00	\$0.00	Boxend	11/01/2020
005-705-01-0-17-1632	005129	Replace Siding and Windows	\$169,766.00	\$0.00	JOLSEN	06/28/2021
005-667-03-S01-19-551	005130	Replace Exterior Sidewalks	\$66,000.00	\$0.00	Boxend	04/05/2021

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 Cindy Zabriskie-PM at (617) 573-1186 with any questions.

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

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

This document was created on 9/11/2020 by Cindy Zabriskie-PM, Project Manager

Maintenance and Repair Plan

Maintenance Objective

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

About This Maintenance and Repair Plan

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

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

Classification and Prioritization of Maintenance Tasks

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

- I. **Emergencies** - Emergencies are only those conditions which are **immediately threatening** to the life or safety of our residents, staff, or structures.
 - **Goal: initiated with 24 to 48 hours.**
- II. **Vacancy Refurbishment - Work necessary to make empty units ready for new tenants.**
 - After emergencies, the refurbishment of vacancies for immediate re-occupancy has the highest priority for staff assignments. **Everyday a unit is vacant is a day of lost rent.**
 - **Goal: vacancy work orders are completed within 30 calendar days or if not completed within that timeframe, LHA has a waiver.**
- III. **Preventive Maintenance** - Work which must be done to **preserve and extend the useful life** of various elements of your physical property and avoid emergency situations.
 - A thorough Preventive Maintenance Program and Schedule that deals with all elements of the physical property is provided later in the document.
 - The Preventive Maintenance Program is reviewed and updated annually and as new systems and facilities are installed.
- IV. **Programmed Maintenance** - Work which is important and is completed to the greatest extent possible within time and budget constraints. Programmed maintenance is grouped and scheduled to make its completion as efficient as possible. Sources of programmed maintenance include:
 - Routine Work includes those tasks that need to be done on a regular basis to keep our physical property in good shape. (Mopping, Mowing, Raking, Trash, etc.)
 - Inspections are the other source of programmed maintenance.
 - o Inspections are visual and operational examinations of parts of our property to determine their condition.
 - o All dwelling units, buildings and sites must be inspected at least annually.
 - o **Goal: Inspection-generated work orders are completed within 30 calendar days from the date of inspection, OR if cannot be completed within 30 calendar days, are added to the Deferred Maintenance Plan or the Capital Improvement Plan in the case of qualifying capital repairs (unless health/safety issue).**
- V. **Requested Maintenance** - Work which is requested by residents or others, does not fall into any category above, and should be accomplished as time and funds are available.
 - Requests from residents or others for maintenance work which does not fall into one of the other categories has the lowest priority for staff assignment.
 - **Goal: Requested work orders are completed in 14 calendar days from the date of tenant request or if not completed within that timeframe (and not a health or safety issue), the task is added and completed in a timely manner as a part of the Deferred Maintenance Plan and/or CIP.**

Emergency Request System

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

METHOD	CONTACT INFO.	TIMES
Call Answering Service	413-493-3605	Nights, Weekends, Holidays.
Call LHA at Phone Number	413-786-1297	Weekdays 8:30am - 4:30 pm
Other	Automatic Laundry -	617-969-4340

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 Agawam Housing Authority main office.

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

Normal Maintenance Request Process

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

METHOD	CONTACT INFO.	TIMES
Text Phone Number		
Call Answering Service	413-493-3605	Nights, Weekends, Holidays
Call Housing Authority Office	413-786-1297	Weekdays 8:30 am - 4:30 pm
Submit Online at Website		
Email to Following Email	ma.cayer@agawamhousin	Anytime
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: PHANetwork

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 Agawam 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?

Maintenance Operations have improved professionalism, efficiency, and ability as a result of clear expectations, and guidelines. The feedback we receive is constructive and focused on minimally critical problems.

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

AHA uses deferred and preventative maintenance charts to guide routine chores, inside and outside the buildings.

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

To perfect the deferred and preventative charts to improve the efficiency of the efforts put forth by the maintenance department.

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	\$407,546.00	\$10,000.00
Last Fiscal Year Actual Spending	\$363,501.00	\$350.00
Current Fiscal Year Budget	\$446,075.00	\$48,400.00

E. Unit Turnover Summary

# Turnovers Last Fiscal Year	19
Average time from date vacated to make Unit "Maintenance Ready"	34 days
Average time from date vacated to lease up of unit	67 days

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

The Deferred and Preventative maintenance plans are the same documents.

Attachments

These items have been prepared by the Agawam 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.

DHCD Review Comment Regarding the Attachments

DHCD staff have reviewed the LHA's maintenance plan attachments and have the following comments:

The deferred maintenance plan was the same as the preventive maintenance plan and neither document provided any mention of deferred maintenance. There was no deferred maintenance plan, no deferred maintenance list, or a deferred maintenance work order report.

Maintenance Plan Document
Agawam Housing Authority
2020

Housing Authority General Maintenance & Repair Statement of Priorities

- 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 constraint. Programmed maintenance is grouped and scheduled to make their completion as efficient as possible. Sources of programmed maintenance include:
 1. **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.)
 2. **Inspections** are the other source of programmed maintenance.
 - Inspections are visual and operational examinations of parts of our property to determine their condition.
 - All dwelling units, buildings and properties **must be inspected at least annually.**
 - **Goal: Inspection work orders are completed within 30 calendar days from the date of inspection, 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.**

Note: If the LHA has any examples, please list them below with any other additional comments.

Additional LHA comments/content:

Agawam Housing Authority will strive to complete requested work orders within a 24-48-hour time frame.

Emergency Response System-Standard Operating Procedure (SOP) (2 pages)

Emergency Response System – Two Key Parts:

- 1) System for responding to Emergencies: There exists an after-hours on call system to respond to emergency maintenance requests 24 hours a day and the system documents the results of that response.
- 2) Distributed Definition of What an Emergency is: LHA maintains a list (see list below) of items that are considered an emergency. Residents, staff and call service should have a clear definition of what an emergency is.

System for Responding to Emergencies:

1. Does your LHA have a 24 hour system for responding to emergencies?

YES	NO
X	

2. List of Emergencies.

The following is a list of, but not limited to situations that qualify as an emergency. If you have any questions regarding this list or other matters that may constitute an Emergency, please contact the [AHA] main office.

EMERGENCY
Fires of any kind
Gas leaks
Electric power failures
Elevator stoppage
Broken water pipes
Sewer blockage
Roof drain blockage
Roof leak
Security lock failure
Lock outs
No heat
Broken window glass
Snow or ice storm
Other/Write In (for the addition of any additional items)

NOT CONSIDERED EMERGENCIES	
Faucet Dripping	A Hole in the Wall
Closet Door off Track	The Door Squeaks
Screen Has Hole in it	There are Cobwebs in the Corner
1 of 4 Stove Burner is not Working	The Paint is Peeling

Drip Pans need replacing

Spray for seasonal Ants

3. How can tenants get in contact with the LHA if they have an **Emergency** at any time day or night?

METHOD	CONTACT INFO.	TIMES
Can Text Phone Number	N/A	N/A
Can Call (Answering Service)	413-493-3605	4:30 PM to 8:30 AM
Can Call LHA at Phone Number	413-786-1297 Any Extension	8:30 AM to 4:30 PM
	1001 CarrieAnne Terpening	
	1004 Geri Balicki	
	1002 Maureen Cayer	
Can Submit Online	N/A	N/A
Can Email	Ca.terpening@agawamhousing.org	8:30 AM to 4:30 PM

4. Has LHA distributed this Emergency Contact procedure to:

	YES	NO
Tenants	X	
Staff	X	
Answering Service	X	

Normal Maintenance Response System-Standard Operating Procedure (SOP)

Non-Emergency Response System:

- 1) System for Responding to **Non-Emergencies**: There exists a contact system to respond to **Non-Emergency** maintenance requests the system documents the results of that response.

System for Responding to Non-Emergencies:

1. Does your LHA have a system for responding to normal maintenance (**Non-emergencies**)?

YES	NO
X	

2. How can tenants get in contact with the LHA if they have a **Non-emergency** at any time day or night?
(check all that apply and fill in the accompanying details)

METHOD	CONTACT INFO.	TIMES
Can Text Phone Number during following hours	N/A	N/A
Can Call (Answering Service) at Phone Number	N/A	N/A
Can Call LHA at Phone Number	413-789-1297 Ext. 1001	8:30 AM to 4:30 PM
Can Submit Online at Website	N/A	N/A
Can Email to Following Email	Ca.terpening@agawamhousing.org	8:30 AM to 4:30 PM
Other	N/A	N/A

3. Has LHA distributed this Contact procedure to:

	YES	NO
Tenants	X	
Staff	X	
Answering Service (if applicable)	X	

Maintenance Plan Narrative

Narrative Question # 1	How would you assess your Maintenance Operations based on feedback your received from staff, tenants, DHCD (PMR & AUP), and any other sources?
We receive primarily positive feed- back from all mentioned. We constantly strive to be more efficient and make Agawam Housing Authority (AHA) a healthy, safe place to live.	

Narrative Question # 2	What changes have you made to maintenance operations since your last Annual Plan submission?
PHA network has been better utilized. Annual apartment inspections have become more efficient. We have added snow removal equipment.	

Narrative Question # 3	What are your maintenance goals for this coming year?
Strive to complete apartment turn overs on time. With the assistance of RCAT, address the exterior of some buildings impacted from weather and normal usage. Improve the integrity of aging exteriors, begin the process of bathroom upgrades for most properties.	

<u>Maintenance Budget Summary</u>			
	Overall Budget	Extraordinary Maintenance	Date
Current Fiscal Year Budget	194,746.00	48,400.00	9/30/20
Current Fiscal Year Spent to date	159,570.37	48,400.00	9/30/20
This upcoming Fiscal year Budget	146,075.00	0.00	9/30/21

<u>Unit Turnover Summary</u>	
# Turnovers last Fiscal year	22
Average time to make Unit "Maintenance Ready"	20 days
Average time to Lease –up unit	7 days/36 days

<u>Additional LHA comments/content:</u>
AHA unit turnover time was 7 days before CHAMP. AHA unit turnover time is now 36 days after the launch of CHAMP.

Work Order Management

LHA Uses the following type of Work Order System to record and track all work completed.		
Type of Work Order System	Check One	Comments
Computer Software System-Web Based (e.g. PHA Network, HAB, PHA-Web, etc.)	X	PHA Network
Computer Software System-Non-Web based (e.g. SHARP (MS Access), MS Excel, MS Word, etc.)	N/A	N/A
Manual System—Please specify in Comments section	N/A	N/A
Other-Please Specify in Comments section	N/A	N/A

Work orders are created using the following types/categories: (check all that apply)	
Emergency	X
Vacancy	X
Preventive Maintenance	X
Inspections	X
Routine	X
Tenant Requests	X
Deferred Maintenance	X

Work Order Process:

Step	Step Description	YES/NO
1	Maintenance Request taken/submitted per the Standard Operating procedures above	Y
2	Maintenance Requests logged into a computerized system or manual log	Y
3	Maintenance Report(s) or List(s) generated	Y
4	Work Orders Generated	Y
5	Work Orders Assigned	Y
6	Work Orders Tracked	Y
7	Work Orders Completed/Closed Out	Y

Routine Maintenance Schedule and Checklist

Agawam Housing Authority

**DEVELOPMENTS: 667-1, 667-2, 667-3,
667-4, 200-1, 705-1**

Landscaping and Grounds Routine Maintenance

[illegible]

Building Routine Maintenance														
Building Interior														
TASK	Frequency	By	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Hallways, Stairs, Lobbies, Community Rm - vacuum carpet, mop floors, sweep and vacuum public spaces, wipe down dirty walls	Weekly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Wash windows in public areas	Monthly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Toilets - Clean public toilets/restrooms	Weekly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Clean Staff toilets/restrooms	Weekly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Offices- Sweep / Vacuum offices	Weekly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Light Bulbs - Replace if burnt out in common areas and offices	As Needed	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Elevators- Clean cab walls and doors	Monthly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Sweep / Mop / Vacuum elevator floors	Monthly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Clean Dumpsters Areas- Pick up trash on the ground	As Needed	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Empty Common Room Trash - Laundry Room, Community Room, Bathrooms	Weekly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Other Routine Maintenance														
Inventory, Meeting, Training, Tools														
TASK	Frequency	By	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Maintain Authority inventory	Monitored Daily	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Attend Staff meetings	Daily Briefing	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Attend Training sessions	Annual	Staff				X								
Clean and sharpen tools	As Needed	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Sharpen mower blades	Annually	Staff				X								
Service Snow Removal Equipment	Annually	Staff									X			
NOTE: Routine (and Emergency) Work Orders will be created due to results from Inspections Maintenance Tasks.														

Preventive Maintenance Schedule and Checklist

Preventive Maintenance Schedule and Checklist

**LHA NAME: Agawam
Housing Authority**

DEVELOPMENT: 667-1, 667-2, 667-3, 667-4, 200-1 & 705

Buildings & Grounds Preventive Maintenance

Building Envelope

[illegible]

Preventive Maintenance Schedule and Checklist

**LHA NAME: Agawam
Housing Authority**

DEVELOPMENT: 667-1, 667-2, 667-3, 667-4, 200-1 & 705

Buildings & Grounds Preventive Maintenance

Building Interior – Common Areas

[illegible]

[illegible]

[illegible]

Dwelling Unit Preventive Maintenance – Preformed during Annual Inspections														
Heat and smoke detectors														
TASK	Frequency	By	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Battery Heat / Smoke Detectors - Test, Change batteries	Annually	Staff			667 -1		667 -4		667 -3	667 -2	200 -1 705			
Test hardwired detectors (with System)	Annually	Staff			667 -1		667 -4		667 -3	667 -2	200 -1 705			
Pest control														
Set Traps	Annually / As Needed	Staff			667 -1		667 -4		667 -3	667 -2	200 -1 705			
Floors														
Refinish floors	At Turnover/ As Needed	Staff / Vendor			667 -1		667 -4		667 -3	667 -2	200 -1 705			
Ceilings														
Refinish	At Turnover/ As Needed	Staff			667 -1		667 -4		667 -3	667 -2	200 -1 705			
Walls														
Refinish	At Turnover/ As Needed	Staff			667 -1		667 -4		667 -3	667 -2	200 -1 705			
Recaulk (kitchen and bath)	At Turnover/ As Needed	Staff			667 -1		667 -4		667 -3	667 -2	200 -1 705			
Kitchen fixtures														
KITCHEN - Inspect Range,	Annually	Staff			667 -1		667 -4		667 -3	667 -2	200 -1 705			
HVAC fixtures														
Air Source Heat Pumps - Vacuum, Clean Condenser	Annually	Staff			667 -1									
Unit Forced Hot Water - Check for Air locks, Bleed	As Needed	Staff / Vendor			667 -1		667 -4		667 -3	667 -2	200 -1 705			
Unit Electrical Baseboard - Vacuum around fins	During Turn Over	Staff			667 -1		667 -4		667 -3	667 -2	200 -1 705			
Unit Forced Hot Air - Vacuum Vents	During Turn Over	Staff			667 -1		667 -4		667 -3	667 -2	200 -1 705			
Unit Bathroom Fans - Inspect, Vacuum, Clean	Annually	Staff			667 -1		667 -4		667 -3	667 -2	200 -1 705			
Bathroom Plumbing & Fixtures														
Faucet & Toilet & Vanity Lights	Annually	Staff			667 -1		667 -4		667 -3	667 -2	200 -1			

											705			
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[illegible]

Inspection Schedule - Buildings, Grounds and Units

Inspections Schedule and Checklist														
NAME: AGAWAM HOUSING AUTHORITY			DEVELOPMENT: 667-1, 667-2, 667-3, 667-4, 200-1, 705											
Buildings & Grounds Inspections														
Building Envelope														
TASK	Frequency	By	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
ROOFS - Sloped/Flat and EPDM/Shingle/Metal	Bi-Annually / Annually	Staff				X						X		
WALLS - Brick, Vinyl, Shingle	Annually	Staff				X								
WINDOWS, DOORS - Seals, Operators	Annual Inspection	Staff				X								
FOUNDATIONS - Cracks, vent covers	Annually	Staff				X								
Building Interior														
FLOORS - Wood, Vinyl, Carpet	Annual Inspection	Staff				X								
CEILINGS	Annual Inspection	Staff				X								
WALLS	Annual Inspection	Staff				X								
Pest Control														
PEST CONTROL - Pests	As Needed	Vendor	X	X	X	X	X	X	X	X	X	X	X	X
Common Kitchen, Laundry														
KITCHEN - Inspect Appliances	Annually	Staff										X		
Kitchen, Bath - Cabinets, fixtures	Annually	Staff										X		
Trash Dumpsters														
Empty Trash / Recycle Cans	Weekly	Vendors	X	X	X	X	X	X	X	X	X	X	X	X

Dwelling Unit Inspections Schedule and Checklist														
AGAWAM HOUSING AUTHORITY			ALL DEVELOPMENTS: 667-1, 667-2, 667-3, 667-4, 200-1, 705											
TASK	Frequency	By	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Country View Estates 667-1														
Buildings 1 -7 (Units 1-40)	Annually	Staff			X									
Colonial Haven 667-2														
Buildings 1-13 (Units 1-52)	Annually	Staff								X				
Meadow Brook Manor 667-3														
Buildings 1-6 (Units 1-64)	Annually	Staff							X					
Danahy School House 667-4														
Apts. 1-35	Annually	Staff					X							
Brady Village 200-1														
Buildings 1-12 (44 Units: 1A-12D)	Annually	Staff									X			
Wade Village 705-1														
4 Buildings (7 Units: 24-36 Even only)	Annually	Staff									X			
Annual Inspection Task – Per Development listed above.														
Living Room														
Security/Entry Door	Annually	Staff			667-1		667-4		667-3	667-2	200-1 705			
Ceiling, Walls, Floor	Annually	Staff			667-1		667-4		667-3	667-2	200-1 705			
Electrical	Annually	Staff			667-1		667-4		667-3	667-2	200-1 705			
Window, Screen, Night Latches	Annually	Staff			667-1		667-4		667-3	667-2	200-1			

											705			
Kitchen														
Security/Entry Door	Annually	Staff			667-1		667-4		667-3	667-2	200-1 705			
Ceiling, Walls, Floor	Annually	Staff			667-1		667-4		667-3	667-2	200-1 705			
Windows, Screen, Night Latches	Annually	Staff			667-1		667-4		667-3	667-2	200-1 705			
Cabinets & Countertops	Annually	Staff			667-1		667-4		667-3	667-2	200-1 705			
Electrical	Annually	Staff			667-1		667-4		667-3	667-2	200-1 705			
Electric Stove, Coils, Drip Pans, Vent	Annually	Staff			667-1		667-4		667-3	667-2	200-1 705			
Sink, Sink drainage, faucet,	Annually	Staff			667-1		667-4		667-3	667-2	200-1 705			
Bathroom														
Security	Annually	Staff			667-1		667-4		667-3	667-2	200-1 705			
Electrical	Annually	Staff			667-1		667-4		667-3	667-2	200-1 705			
Ceiling, Walls, Floor	Annually	Staff			667-1		667-4		667-3	667-2	200-1 705			
Toilet	Annually	Staff			667-1		667-4		667-3	667-2	200-1 705			
Sink	Annually	Staff			667-1		667-4		667-3	667-2	200-1 705			
Tub / Shower	Annually	Staff			667-1		667-4		667-3	667-2	200-1 705			
Bedroom 1														
Entry Door	Annually	Staff			667-1		667-4		667-3	667-2	200-1 705			
Walls, Ceiling, Floor	Annually	Staff			667-1		667-4		667-3	667-2	200-1 705			
Window, Screen, Night Latches	Annually	Staff			667-1		667-4		667-3	667-2	200-1 705			
Electrical, Lighting	Annually	Staff			667-		667-		667-	667-	200-			

					1		4		3	2	1 705			
Bedroom 2														
Entry Door	Annually	Staff									200- 1 705			
Walls, Ceiling, Floor	Annually	Staff									200- 1 705			
Window, Screen, Night Latches	Annually	Staff									200- 1 705			
Electrical, Lighting	Annually	Staff									200- 1 705			
Bedroom 3														
Entry Door	Annually	Staff									200- 1 705			
Walls, Ceiling, Floor	Annually	Staff									200- 1 705			
Window, Screen, Night Latches	Annually	Staff									200- 1 705			
Electrical, Lighting	Annually	Staff									200- 1 705			
Basement														
Security / Entry Door	Annually	Staff									200- 1 705			
Use / Space	Annually	Staff									200- 1 705			
Ceiling, Walls, Floor	Annually	Staff									200- 1 705			
Electrical	Annually	Staff									200- 1 705			
Window, Screen, Light	Annually	Staff									200- 1 705			
Dyer Ventilation	Annually	Staff									200- 1 705			
HVAC														
Adequacy	Annually	Staff			667- 1		667- 4		667- 3	667- 2	200- 1 705			
Fuel Storage	Annually	Staff			667- 1		667- 4		667- 3	667- 2	200- 1 705			

											705			
Condition/Safety	Annually	Staff			667-1		667-4		667-3	667-2	200-1 705			
Plumbing														
Water Pressure/Quality	Annually	Staff			667-1		667-4		667-3	667-2	200-1 705			
Water Heater	Annually	Staff			667-1		667-4		667-3	667-2	200-1 705			
Water Temperature	Annually	Staff			667-1		667-4		667-3	667-2	200-1 705			
Plumbing/Piping	Annually	Staff			667-1		667-4		667-3	667-2	200-1 705			
Sewer/Septic	Annually	Staff			667-1		667-4		667-3	667-2	200-1 705			
Gas Fittings	Annually	Staff			667-1		667-4		667-3	667-2	200-1 705			
General Health & Safety														
Access/Egress/Security	Annually	Staff			667-1		667-4		667-3	667-2	200-1 705			
Interior Halls/Stairs	Annually	Staff			667-1		667-4		667-3	667-2	200-1 705			
Gargage/Debris/Clean	Annually	Staff			667-1		667-4		667-3	667-2	200-1 705			
Infestation	Annually	Staff			667-1		667-4		667-3	667-2	200-1 705			
Paint Condition	Annually	Staff			667-1		667-4		667-3	667-2	200-1 705			
Electrical	Annually	Staff			667-1		667-4		667-3	667-2	200-1 705			
Smoke Detectors	Annually	Staff			667-1		667-4		667-3	667-2	200-1 705			
Emergency Lighting	Annually	Staff			667-1		667-4		667-3	667-2	200-1 705			
Interior Air Quality	Annually	Staff			667-1		667-4		667-3	667-2	200-1 705			

AHA- Annual Plan 2020

Asbestos	Annually	Staff			667-1		667-4		667-3	667-2	200-1 705			
Dampness/Wet	Annually	Staff			667-1		667-4		667-3	667-2	200-1 705			
Handicap Suitability	Annually	Staff			667-1		667-4		667-3	667-2	200-1 705			
Other Interior Hazards	Annually	Staff			667-1		667-4		667-3	667-2	200-1 705			
Exterior														
Roof	Annually	Staff			667-1		667-4		667-3	667-2	200-1 705			
Gutters, Drains, Siding, Trim	Annually	Staff			667-1		667-4		667-3	667-2	200-1 705			
Porches, Stairs, Rails	Annually	Staff			667-1		667-4		667-3	667-2	200-1 705			
Foundation	Annually	Staff			667-1		667-4		667-3	667-2	200-1 705			
Yard, Site, Parking, Walking	Annually	Staff			667-1		667-4		667-3	667-2	200-1 705			
Battery Heat / Smoke Detectors														
Inspect Condition	Annually	Staff			667-1		667-4		667-3	667-2	200-1 705			
Inspect System Heat thermostats (in Units)	Annually	Staff			667-1		667-4		667-3	667-2	200-1 705			
Pest control														
Inspect Unit	Annually	Staff			667-1		667-4		667-3	667-2	200-1 705			

Development Information						
Development No.		667-1	667-2	667-3	667-4	200-1 / 200-2
Year Built		1963	1968	1972	1948 / 1988 Addition	1948
Development Name & Address		Country View Estates. 95 N. Westfield St.	Colonial Haven 885 Main St.	Meadow Brook Manor. 66 Meadow Brook Manor	Danahy School House Apts. 51 Maple St.	Brady Village 775 Springfield St.
Major Renovation (Year ONLY).		2011, 2014, 2018	2014, 2015, 2016	2002, 2011, 2019	1987, 2009, 2016	2008, 2011, 2017, 2019
Check the Box if applicable		CHECK BOX	CHECK BOX	CHECK BOX	CHECK BOX	CHECK BOX
No of Floors	1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	2 – 4	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	4 – 6	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	+ 8	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
No of Units	40	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	52	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	64	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	35	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Facilities	Community Rm	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	Laundry	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	Main Office	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Reception	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Maintenance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Storage	Garage	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
	Storage Shed	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Container	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Off-Site	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Roof Systems	Shingles	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	EPDM	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	Metal	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	BUR	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Building Systems	Elevator	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Chair Lift	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Generator	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Access Control	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fire Safety Systems	Fire Alarm	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Monitored	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Fire Pump	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Sprinklers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Heat	Gas	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Propane	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Co-Gen	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Electric	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Hot Water	Gas	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Propane	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Co-Gen	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Electric	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Provide Development Details. Check Applicable Boxes						
Development No.	705-1	Click here to enter text.	Click here to enter text.	Click here to enter text.	Click here to enter text.	Click here to enter text.
Year Built	1989	Click here to enter text.	Click here to enter text.	Click here to enter text.	Click here to enter text.	Click here to enter text.
Development Name & Address	Wade Village 24-36 Franklin St.	Click here to enter text.	Click here to enter text.	Click here to enter text.	Click here to enter text.	Click here to enter text.
Major Renovation (Year ONLY).	2016	Click here to enter text.	Click here to enter text.	Click here to enter text.	Click here to enter text.	Click here to enter text.
Check the Box if applicable	CHECK BOX	CHECK BOX	CHECK BOX	CHECK BOX	CHECK BOX	CHECK BOX
No of Floors	1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	2 – 4	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	4 – 6	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	+ 8	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
No of Units	1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	7	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Facilities	Community Rm	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Laundry	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Main Office	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Reception	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Maintenance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Storage	Garage	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Storage Shed	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Container	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Off-Site	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Roof Systems	Shingles	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	EPDM	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Metal	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	BUR	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Building Systems	Elevator	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Chair Lift	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Generator	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Access Control	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fire Safety Systems	Fire Alarm	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Monitored	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Fire Pump	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Sprinklers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Heat	Gas	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Propane	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Co-Gen	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Electric	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Hot Water	Gas	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Propane	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Co-Gen	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Electric	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Building Systems

HEATING SYSTEMS

Electric Heat – 667-1, 667-2, 667-3						
Heating System	Baseboard		Wall Heater		Heat Pumps	
1 Unit per 1 Apartment	Yes <input checked="" type="checkbox"/>	No <input type="checkbox"/>	Yes <input checked="" type="checkbox"/>	No <input type="checkbox"/>	Yes <input checked="" type="checkbox"/>	No <input type="checkbox"/>
1 Unit per Building	Yes <input type="checkbox"/>	No <input type="checkbox"/>	Yes	No <input type="checkbox"/>	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Serviced by:	Serviced by (Phone #):		On-Call Contract			
Turnbull Electric	413-786-4528		Yes: <input type="checkbox"/> No: <input checked="" type="checkbox"/>			
Northup Electric HVAC	413-786-8930		Yes: <input type="checkbox"/> No: <input checked="" type="checkbox"/>			

Oil / Gas Heat – 667-4, 200-1/200-2, 705		
Heating System	Oil-Fired	Gas-Fired
Heating System	<input type="checkbox"/>	<input checked="" type="checkbox"/>
1 Unit per 1 Apartment	Yes <input checked="" type="checkbox"/>	No <input type="checkbox"/>
1 Unit per Building	Yes <input checked="" type="checkbox"/>	No <input type="checkbox"/>
Serviced by:	Serviced by (Phone #):	On-Call Contract
CLARK HVAC	413-786-8443	Yes: <input checked="" type="checkbox"/> No: <input type="checkbox"/>

HOT WATER SYSTEMS

Hot Water	Electric <input type="checkbox"/>	Oil <input type="checkbox"/>	Gas <input type="checkbox"/>
1 Unit per 1 Apartment	Yes <input checked="" type="checkbox"/>	No <input type="checkbox"/>	
1 Unit per Building	Yes <input checked="" type="checkbox"/>	No <input type="checkbox"/>	
LHA-Owned / Rented	Rented <input checked="" type="checkbox"/>	LHA-Owned <input checked="" type="checkbox"/>	
Rent 2 Hot water tanks	In the laundry room for 667-2	New England Water Company	
Serviced by:	Serviced by (Phone #):	On-Call Contract	
CLARK HVAC	413-786-8443	Yes: <input type="checkbox"/> No: <input checked="" type="checkbox"/>	
Northup Electric Hvac	413-786-8930	Yes: <input type="checkbox"/> No: <input checked="" type="checkbox"/>	
Boulanger's Plumbing	413-527-3240	Yes: <input type="checkbox"/> No: <input checked="" type="checkbox"/>	

ROOF SYSTEMS

DEV #: 667-1	Install Date	Warranty	Shingle	EPDM	Metal	BUR
Address: 95 N.Westfield St.	2006	Yes <input checked="" type="checkbox"/>	Yes <input checked="" type="checkbox"/>	Yes <input type="checkbox"/>	Yes <input type="checkbox"/>	Yes <input type="checkbox"/>
DEV #: 667-2	Install Date	Warranty	Shingle	EPDM	Metal	BUR
Address: 885 Main St	2000	Yes <input checked="" type="checkbox"/>	Yes <input checked="" type="checkbox"/>	Yes <input type="checkbox"/>	Yes <input type="checkbox"/>	Yes <input type="checkbox"/>
DEV #: 667-3	Install Date	Warranty	Shingle	EPDM	Metal	BUR
Address: 66 MeadowBrook Manor	2009	Yes <input checked="" type="checkbox"/>	Yes <input checked="" type="checkbox"/>	Yes <input type="checkbox"/>	Yes <input type="checkbox"/>	Yes <input type="checkbox"/>
DEV #: 667-4	Install Date	Warranty	Shingle	EPDM	Metal	BUR
Address: Danahy School House	1985	Yes <input type="checkbox"/>	Yes <input checked="" type="checkbox"/>	Yes <input type="checkbox"/>	Yes <input type="checkbox"/>	Yes <input type="checkbox"/>
DEV #: -200-1	Install Date	Warranty	Shingle	EPDM	Metal	BUR
Address: 775 Springfield St.	1994	Yes <input type="checkbox"/>	Yes <input checked="" type="checkbox"/>	Yes <input type="checkbox"/>	Yes <input type="checkbox"/>	Yes <input type="checkbox"/>
DEV #: 705-1	Install Date	Warranty	Shingle	EPDM	Metal	BUR
Address: 24-36 Franklin St	1985	Yes <input type="checkbox"/>	Yes <input checked="" type="checkbox"/>	Yes <input type="checkbox"/>	Yes <input type="checkbox"/>	Yes <input type="checkbox"/>

FIRE PROTECTION (SPRINKLER AND FIRE ALARM SYSTEMS)

Fire Alarm System:	Non-Addressable	Addressable Monitored	Phone	Cell
If YES, Check Box	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
System Name	SILENT KNIGHT		Install Date: 2012	
FD Radio Connection	Alerted by IBS Electronics & Security		Last Test: 10/03/2019	
Under Warranty?	Yes: <input type="checkbox"/>		No: <input checked="" type="checkbox"/>	
Service Company	I.B.S.	SPLFD MA 413-739-2271		

ELEVATORS / CHAIR LIFTS

Elevator:		Elevator #1	Elevator #2	Elevator #3	Elevator #4
If YES, Check Box		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Type	Hydraulic	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Traction	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Brand Name:		Elevator Systems State ID# 6-P-13 ID# 10025-1			
Year Installed:		1987	Click here to enter text.	Click here to enter text.	Click here to enter text.
Inspected Date		Feb. 2020			
Serviced / Maintained by: Include Phone Number		BAYSTATE ELEVATOR 275 Silver Street, Agawam, MA 01001 786-7000			

GFCI, ARC FAULT PROTECTION, ELECTRIC PANELS

GFCI	Kitchen	Bathroom	Exterior	Other
	Yes <input checked="" type="checkbox"/>	Yes <input checked="" type="checkbox"/>	Yes <input checked="" type="checkbox"/>	Yes <input type="checkbox"/>
Tamper-Resistant	Yes <input type="checkbox"/> No <input type="checkbox"/>			
Arc Fault Protection	Kitchen	Bathroom	Bedrooms	Living
	Yes <input type="checkbox"/>	Yes <input type="checkbox"/>	Yes <input type="checkbox"/>	Yes <input type="checkbox"/>
Tamper-Resistant	Yes <input type="checkbox"/> No <input type="checkbox"/>			
Electric Panels	Federal Pacific		In Closet	
	Yes <input checked="" type="checkbox"/>	No <input type="checkbox"/>	Yes <input checked="" type="checkbox"/>	No <input type="checkbox"/>
Amps	60 <input checked="" type="checkbox"/>	100 <input checked="" type="checkbox"/>	Other 400AMP	

EXTERIOR AND COMMON LIGHTING

Lighting:	Exterior (Wall mount)	Exterior (Pole Mount)	Entry Ways	Hallways
LED (Arrays)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
LED (Medium Base)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Incandescent	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Halogen	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
HPS / LPS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

OTHER

Laundry Rooms		
Property	Washers	Dryers
Country View	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Colonial Haven	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Meadowbrook Manor	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Danahy Schoolhouse	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Serviced By:	Serviced by (Phone #):	On Call Contact
Automatic Laundry	888-699-2035	Yes: <input type="checkbox"/> No: <input checked="" type="checkbox"/>
Affordable Duct Cleaning	413-786-9853	Yes: <input type="checkbox"/> No: <input checked="" type="checkbox"/>

Vehicles & Small Engines		
MAKE	MODEL	YEAR
Ford	F350	2008
Ford	F250	2018
Ford	F350 Dump	2008
John Deere	Lawn Mower	2014
Ventrac	Snow Machine	2018
Serviced By:	Serviced by (Phone #):	On Call Contact
Sarat Ford Lincoln	413-206-2035	Yes: <input type="checkbox"/> No: <input checked="" type="checkbox"/>
Taplin Power Equipment	413-781-4352	Yes: <input type="checkbox"/> No: <input checked="" type="checkbox"/>

VENDOR LIST		
NAME	ADDRESS	PHONE
CLARK HVAC	15 Barbara Lane Feeding Hills, MA 01033	1-413-786-8443
NORTHUP ELECTRICAL PLUMBING	73 Bowles Road Agawam, MA 01001	1-413-786-8930
BOULANGERS PLUMBING & HEATING	373 Main Street Easthampton, MA 01027	1-413-536-8845
NEW ENGLAND WATER COMPANY	P.O. Box 1485 Littleton, MA 01460	1-800-445-5523
I.B.S. ELECTRIC	225 Armory Street Springfield, MA 01104	1-413-739-2271
TECH ROOFING	896 Sheridan Street Chicopee, MA 01020	1-413-331-5667
BAYSTATE ELEVATOR	275 Silver Street Agawam, MA 01001	1-413-786-7000
AFFORDABLE DUCT CLEANING	80 S. Ramah Circle Agawam, MA 01001	1-413-786-9853
AUTOMATIC LAUNDRY	45 Border Street West Newton, MA 02465	1-617-969-4340
SARAT FORD LINCOLN	245 Springfield Street Agawam, MA 01001	1-413-206-2035
TAPLIN YARD, PUMP & POWER EQUIPMENT	197 Main Street Agawam, MA 01001	1-413-781-4352
BRAMAN INSECT & PEST CONTROL	147 Almgren Drive Agawam, MA 01001	1-800-338-6757

Maintenance Plan (Program and Policy)

1. Introduction

This document outlines the Agawam Housing Authority maintenance program and procedures.

Description of AHA Developments:

667-1

Country View Estates, located at 95 North Westfield St., this development has 40 one-bedroom apartments. These units are in 7 one-story buildings with each apartment having a front and back door opening directly to the outside. This site also includes a stand-alone community building, with laundry facilities, public bathrooms and a small kitchen. There is also a maintenance workshop located beneath building 4.

667-2

Colonial Haven Apts., Located at 885 Main St., this development has 52 one-bedroom apts. These units are in 13 one-story buildings with each apt having a front and back door opening directly to the outside. This also includes a stand-alone community building, with laundry facilities, public bathrooms and a small kitchen. There is also a free-standing maintenance shed.

667-3

Meadowbrook Manor Apts. located at 66 Meadowbrook Manor. This development has 64 one-bedroom apts. These units are in six two story buildings, with each apt. having a front and back entrance. The site includes a stand-alone building consisting of a laundry facility, public bathrooms, kitchen, gathering area, and AHA office. This property also has a garage, used as maintenance headquarters for all properties.

667-4

Danahy School House Apts., located at 51 Maple St., this development has 35 one-bedroom apts., These units are in one three story building. Each apt has one entrance leading to a common hall and an elevator. Of the 35 apts., 10 are congregate units with shared kitchen and bath areas. Building also has a laundry facility, public bathrooms and another kitchen area. The first level has a maintenance room and boiler room.

200-1

Brady Village Apts., located at 775 Springfield St., this development has a total of 44 town house units, 8 three bedroom, 36 two bedrooms. These units are in 12 two story buildings. Each apt has afffront and rear entrance directly to the outside.

705-1

Wade Village, located at 24-36 Franklin St., this development has a total of four stand-alone buildings. One 3-bedroom single family ranch style home, and three side by side duplex 3-bedroom homes. This property also has a maintenance garage used for storage.

2. Staffing

Agawam Housing Authority has 3 FT maintenance.

Agawam has 3FT administrative, including the Executive Director

3. Tracking of Maintenance Work

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

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

The maintenance person completing a work order is responsible for updating/completing the work order from the computerized work order system.

4. Routine Maintenance

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

a) Interior of the Community Building

At least twice times a week, the Maintenance Supervisor will conduct a visual inspection of the community room, laundry room and public bathrooms. Based on this visual inspection, these areas will receive the custodial attention needed to keep these areas clean, attractive and hazard free. These tasks will include but not be limited to: vacuuming, sweeping, dry moping and washing the kitchen/laundry/bathroom floors, washing down the laundry areas sink, washing machines and dryers and emptying the waste baskets, washing all glass and door surfaces, cleaning the public bathrooms and restocking toilet paper, paper towels and soap and emptying the waste baskets, dry moping and washing the community room floor, emptying the waste baskets and cleaning the kitchen.

All surfaces in the laundry and public bathrooms will be thoroughly washed and disinfected. As necessary these floors will be washed and buffed to keep their appearance neat and clean.

b) Exterior

Daily, the Maintenance Supervisor should inspect the sites walkways and parking areas. As necessary, these areas should be broom cleaned and free of any visible trash or tripping hazards. The lawns will be mowed as necessary to keep the grass height below 3 inches. In the spring and fall all grass area should be thoroughly raked and cleaned to

remove the accumulation of dead grass, leaves and other debris. The plantings around the site should be kept neatly trimmed and free of trash and debris.

During the winter months, all walkways and parking areas will be kept free and clear of snow and ice. If snow and ice conditions occur outside of the normal workday and workweek, the maintenance staff will report to the Administrative Office for snow and ice removal purposes and will be dispatched to this location by the Maintenance Supervisor. The walkways will be handled using the snow blower assigned to the site and hand tools. Other AHA maintenance staff will handle the areas of the site that can be cleaned by a plow. Prior to the start of each winter season the Maintenance Supervisor and Executive Director will meet and walk the site to determine if any adjustments are needed to the snow removal plan for the site.

Trash removal at the site is provided by an outside contractor hired by the Authority. Residents are responsible for placing their household trash in barrels provided by the Authority and stored at designated sites throughout property. The barrels will be weekly at the designated pick-up area, by the contracted trash removal company. As needed the barrels will be cleaned and disinfected by the Authority's maintenance staff.

5) Annual Unit Inspections

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

6) Preventive Maintenance

Because of the complexity of the AHA mechanical systems at this site preventive maintenance is provided through a combination of outside contractors and AHA staff.

a) Fire Protection

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

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

b) Roof

Each building is equipped with shingle roofs. In the fall and spring of each year, the maintenance staff should conduct a visual inspection of the roofs. During the inspection, the staff person is looking for any lifting shingles or loose flashing. At the same time, the maintenance person will make certain all of the roof drains and gutters appear to be free and clear of any obstructions. Any problems observed during this inspection should be brought to the immediate attention of the Maintenance Supervisor.

c) Exterior Masonry

In the spring and fall, the maintenance staff will conduct a visual inspection, of the building's masonry and concrete. Look for gaps in the mortar, spalling bricks, spalling in the concrete vertical and horizontal surfaces.

d) Space Heating

The heat at Country View Estates, Colonial Haven & Meadowbrook Manor is electric baseboard heating. The heat at Danahy Schoolhouse is forced gas fired hot water system. There is 1 boiler serving the Danahy Schoolhouse. Prior to the start of each heating season, the boilers will be serviced by an outside contractor to make certain they are in proper working condition. The electric heat systems at Country View Estates, Colonial Haven and Meadowbrook Manor vents will be cleaned yearly by Maintenance staff. During unit inspections and the inspection of the common areas, the building maintenance person should make certain the heating elements and thermostats in all units are operating correctly. On a weekly basis, during the heating season, a maintenance staff member should conduct a visual inspection of these AHA boiler rooms to spot any obvious leaks and to detect any abnormal sounds in the circulator motors associated with this system. At Brady Village there is a gas fired forced hot air system in each building with a total of 12. At Wade Village each apartment has a combo gas fired heat & hot water system. Wade Village systems are serviced once a year by a vendor. These systems are within tenant apartments and are checked on an annual basis during Annual Inspections to ensure the systems are working properly.

e) Domestic Hot Water

At Danahy Schoolhouse the domestic hot water is heated by natural gas in one boiler room, for the building. On a weekly basis, a maintenance person will conduct a visual inspection of this AHA mechanical area to spot any obvious leaks and to detect any abnormal sounds in the circulator motors associated with this system. On an annual basis, the boilers should be inspected by the authority's HVAC contractor to make certain the equipment is operating within the appropriate operating parameters. At Country View Estates, Meadowbrook Manor & Colonial Haven, the domestic hot water is provided by electric hot water heaters, on a monthly basis, a maintenance person will conduct a visual inspection of this AHA mechanical area to spot any obvious leaks and to detect any

abnormal sounds in the circulator motors associated with this system. On an annual basis, the boilers should be inspected by the authority's HVAC contractor to make certain the equipment is operating within the appropriate operating parameters. At Brady Village there is a gas fired forced hot water system in each building with a total of 12. At Wade Village each apartment has a combo gas fired heat & hot water system. Wade Village systems are serviced once a year by a vendor. These systems are within tenant apartments and are checked on an annual basis during Annual Inspections to ensure the systems are working properly.

f) Plumbing & Electrical Repairs

The AHA maintenance staff is expected to have the skills necessary to perform most minor plumbing and electrical repairs such as repairing a leaking faucet or a defective light switch. When the maintenance staff encounter a plumbing or electrical problem they are not trained to handle or are comfortable with they are to contact the Executive Director. Based on the nature of the problem, the Maintenance Supervisor/Executive Director will authorize calling in an outside plumber or electrician.

g) Extermination/Pest Control

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

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

7) Vacancy Turnaround

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

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

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

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

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

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

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

8) Maintenance Charges

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

A written itemized bill will be sent to resident. Failure to promptly pay a maintenance charge or enter into and keep a repayment agreement for said charge is grounds for eviction. A resident may appeal the assessment of a maintenance charge to the Executive Director.

9) Definition of Maintenance Emergencies

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

Maintenance Plan Document
Agawam Housing Authority
2020

Housing Authority General Maintenance & Repair Statement of Priorities

- 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 constraint. Programmed maintenance is grouped and scheduled to make their completion as efficient as possible. Sources of programmed maintenance include:
 1. 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.)
 2. Inspections are the other source of programmed maintenance.
 - Inspections are visual and operational examinations of parts of our property to determine their condition.
 - All dwelling units, buildings and properties **must be inspected at least annually.**
 - **Goal: Inspection work orders are completed within 30 calendar days from the date of inspection, 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.**

Note: If the LHA has any examples, please list them below with any other additional comments.

Additional LHA comments/content:

Agawam Housing Authority will strive to complete requested work orders within a 24-48-hour time frame.

Emergency Response System-Standard Operating Procedure (SOP) (2 pages)

Emergency Response System – Two Key Parts:

- 1) System for responding to Emergencies: There exists an after-hours on call system to respond to emergency maintenance requests 24 hours a day and the system documents the results of that response.
- 2) Distributed Definition of What an Emergency is: LHA maintains a list (see list below) of items that are considered an emergency. Residents, staff and call service should have a clear definition of what an emergency is.

System for Responding to Emergencies:

1. Does your LHA have a 24 hour system for responding to emergencies?

YES	NO
X	

2. List of Emergencies.

The following is a list of, but not limited to situations that qualify as an emergency. If you have any questions regarding this list or other matters that may constitute an Emergency, please contact the [AHA] main office.

EMERGENCY
Fires of any kind
Gas leaks
Electric power failures
Elevator stoppage
Broken water pipes
Sewer blockage
Roof drain blockage
Roof leak
Security lock failure
Lock outs
No heat
Broken window glass
Snow or ice storm
Other/Write In (for the addition of any additional items)

NOT CONSIDERED EMERGENCIES	
Faucet Dripping	A Hole in the Wall
Closet Door off Track	The Door Squeaks
Screen Has Hole in it	There are Cobwebs in the Corner
1 of 4 Stove Burner is not Working	The Paint is Peeling

Drip Pans need replacing

Spray for seasonal Ants

3. How can tenants get in contact with the LHA if they have an **Emergency** at any time day or night?

METHOD	CONTACT INFO.	TIMES
Can Text Phone Number	N/A	N/A
Can Call (Answering Service)	413-493-3605	4:30 PM to 8:30 AM
Can Call LHA at Phone Number	413-786-1297 Any Extension	8:30 AM to 4:30 PM
	1001 CarrieAnne Terpening	
	1004 Geri Balicki	
	1002 Maureen Cayer	
Can Submit Online	N/A	N/A
Can Email	Ca.terpening@agawamhousing.org	8:30 AM to 4:30 PM

4. Has LHA distributed this Emergency Contact procedure to:

	YES	NO
Tenants	X	
Staff	X	
Answering Service	X	

Normal Maintenance Response System-Standard Operating Procedure (SOP)

Non-Emergency Response System:

- 1) System for Responding to **Non-Emergencies**: There exists a contact system to respond to **Non-Emergency** maintenance requests the system documents the results of that response.

System for Responding to Non-Emergencies:

1. Does your LHA have a system for responding to normal maintenance (**Non-emergencies**)?

YES	NO
X	

2. How can tenants get in contact with the LHA if they have a **Non-emergency** at any time day or night?
(check all that apply and fill in the accompanying details)

METHOD	CONTACT INFO.	TIMES
Can Text Phone Number during following hours	N/A	N/A
Can Call (Answering Service) at Phone Number	N/A	N/A
Can Call LHA at Phone Number	413-789-1297 Ext. 1001	8:30 AM to 4:30 PM
Can Submit Online at Website	N/A	N/A
Can Email to Following Email	Ca.terpening@agawamhousing.org	8:30 AM to 4:30 PM
Other	N/A	N/A

3. Has LHA distributed this Contact procedure to:

	YES	NO
Tenants	X	
Staff	X	
Answering Service (if applicable)	X	

Maintenance Plan Narrative

Narrative Question # 1	How would you assess your Maintenance Operations based on feedback your received from staff, tenants, DHCD (PMR & AUP), and any other sources?
We receive primarily positive feed- back from all mentioned. We constantly strive to be more efficient and make Agawam Housing Authority (AHA) a healthy, safe place to live.	

Narrative Question # 2	What changes have you made to maintenance operations since your last Annual Plan submission?
PHA network has been better utilized. Annual apartment inspections have become more efficient. We have added snow removal equipment.	

Narrative Question # 3	What are your maintenance goals for this coming year?
Strive to complete apartment turn overs on time. With the assistance of RCAT, address the exterior of some buildings impacted from weather and normal usage. Improve the integrity of aging exteriors, begin the process of bathroom upgrades for most properties.	

<u>Maintenance Budget Summary</u>			
	Overall Budget	Extraordinary Maintenance	Date
Current Fiscal Year Budget	194,746.00	48,400.00	9/30/20
Current Fiscal Year Spent to date	159,570.37	48,400.00	9/30/20
This upcoming Fiscal year Budget	146,075.00	0.00	9/30/21

<u>Unit Turnover Summary</u>	
# Turnovers last Fiscal year	22
Average time to make Unit "Maintenance Ready"	20 days
Average time to Lease –up unit	7 days/36 days

<u>Additional LHA comments/content:</u>
AHA unit turnover time was 7 days before CHAMP. AHA unit turnover time is now 36 days after the launch of CHAMP.

Work Order Management

LHA Uses the following type of Work Order System to record and track all work completed.		
Type of Work Order System	Check One	Comments
Computer Software System-Web Based (e.g. PHA Network, HAB, PHA-Web, etc.)	X	PHA Network
Computer Software System-Non-Web based (e.g. SHARP (MS Access), MS Excel, MS Word, etc.)	N/A	N/A
Manual System—Please specify in Comments section	N/A	N/A
Other-Please Specify in Comments section	N/A	N/A

Work orders are created using the following types/categories: (check all that apply)	
Emergency	X
Vacancy	X
Preventive Maintenance	X
Inspections	X
Routine	X
Tenant Requests	X
Deferred Maintenance	X

Work Order Process:

Step	Step Description	YES/NO
1	Maintenance Request taken/submitted per the Standard Operating procedures above	Y
2	Maintenance Requests logged into a computerized system or manual log	Y
3	Maintenance Report(s) or List(s) generated	Y
4	Work Orders Generated	Y
5	Work Orders Assigned	Y
6	Work Orders Tracked	Y
7	Work Orders Completed/Closed Out	Y

Routine Maintenance Schedule and Checklist

Agawam Housing Authority

DEVELOPMENTS: 667-1, 667-2, 667-3, 667-4, 200-1, 705-1

Landscaping and Grounds Routine Maintenance

[illegible]

Building Routine Maintenance														
Building Interior														
TASK	Frequency	By	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Hallways, Stairs, Lobbies, Community Rm - vacuum carpet, mop floors, sweep and vacuum public spaces, wipe down dirty walls	Weekly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Wash windows in public areas	Monthly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Toilets - Clean public toilets/restrooms	Weekly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Clean Staff toilets/restrooms	Weekly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Offices- Sweep / Vacuum offices	Weekly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Light Bulbs - Replace if burnt out in common areas and offices	As Needed	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Elevators- Clean cab walls and doors	Monthly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Sweep / Mop / Vacuum elevator floors	Monthly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Clean Dumpsters Areas- Pick up trash on the ground	As Needed	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Empty Common Room Trash - Laundry Room, Community Room, Bathrooms	Weekly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Other Routine Maintenance														
Inventory, Meeting, Training, Tools														
TASK	Frequency	By	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Maintain Authority inventory	Monitored Daily	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Attend Staff meetings	Daily Briefing	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Attend Training sessions	Annual	Staff				X								
Clean and sharpen tools	As Needed	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Sharpen mower blades	Annually	Staff				X								
Service Snow Removal Equipment	Annually	Staff									X			
NOTE: Routine (and Emergency) Work Orders will be created due to results from Inspections Maintenance Tasks.														

Preventive Maintenance Schedule and Checklist

Preventive Maintenance Schedule and Checklist

**LHA NAME: Agawam
Housing Authority**

DEVELOPMENT: 667-1, 667-2, 667-3, 667-4, 200-1 & 705

Buildings & Grounds Preventive Maintenance

Building Envelope

[illegible]

Preventive Maintenance Schedule and Checklist

**LHA NAME: Agawam
Housing Authority**

DEVELOPMENT: 667-1, 667-2, 667-3, 667-4, 200-1 & 705

Buildings & Grounds Preventive Maintenance

Building Interior – Common Areas

[illegible]

[illegible]

[illegible]

Dwelling Unit Preventive Maintenance – Preformed during Annual Inspections														
Heat and smoke detectors														
TASK	Frequency	By	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Battery Heat / Smoke Detectors - Test, Change batteries	Annually	Staff			667 -1		667 -4		667 -3	667 -2	200 -1 705			
Test hardwired detectors (with System)	Annually	Staff			667 -1		667 -4		667 -3	667 -2	200 -1 705			
Pest control														
Set Traps	Annually / As Needed	Staff			667 -1		667 -4		667 -3	667 -2	200 -1 705			
Floors														
Refinish floors	At Turnover/ As Needed	Staff / Vendor			667 -1		667 -4		667 -3	667 -2	200 -1 705			
Ceilings														
Refinish	At Turnover/ As Needed	Staff			667 -1		667 -4		667 -3	667 -2	200 -1 705			
Walls														
Refinish	At Turnover/ As Needed	Staff			667 -1		667 -4		667 -3	667 -2	200 -1 705			
Recaulk (kitchen and bath)	At Turnover/ As Needed	Staff			667 -1		667 -4		667 -3	667 -2	200 -1 705			
Kitchen fixtures														
KITCHEN - Inspect Range,	Annually	Staff			667 -1		667 -4		667 -3	667 -2	200 -1 705			
HVAC fixtures														
Air Source Heat Pumps - Vacuum, Clean Condenser	Annually	Staff			667 -1									
Unit Forced Hot Water - Check for Air locks, Bleed	As Needed	Staff / Vendor			667 -1		667 -4		667 -3	667 -2	200 -1 705			
Unit Electrical Baseboard - Vacuum around fins	During Turn Over	Staff			667 -1		667 -4		667 -3	667 -2	200 -1 705			
Unit Forced Hot Air - Vacuum Vents	During Turn Over	Staff			667 -1		667 -4		667 -3	667 -2	200 -1 705			
Unit Bathroom Fans - Inspect, Vacuum, Clean	Annually	Staff			667 -1		667 -4		667 -3	667 -2	200 -1 705			
Bathroom Plumbing & Fixtures														
Faucet & Toilet & Vanity Lights	Annually	Staff			667 -1		667 -4		667 -3	667 -2	200 -1			

											705			
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[illegible]

Inspection Schedule - Buildings, Grounds and Units

Inspections Schedule and Checklist														
NAME: AGAWAM HOUSING AUTHORITY			DEVELOPMENT: 667-1, 667-2, 667-3, 667-4, 200-1, 705											
Buildings & Grounds Inspections														
Building Envelope														
TASK	Frequency	By	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
ROOFS - Sloped/Flat and EPDM/Shingle/Metal	Bi-Annually / Annually	Staff				X						X		
WALLS - Brick, Vinyl, Shingle	Annually	Staff				X								
WINDOWS, DOORS - Seals, Operators	Annual Inspection	Staff				X								
FOUNDATIONS - Cracks, vent covers	Annually	Staff				X								
Building Interior														
FLOORS - Wood, Vinyl, Carpet	Annual Inspection	Staff				X								
CEILINGS	Annual Inspection	Staff				X								
WALLS	Annual Inspection	Staff				X								
Pest Control														
PEST CONTROL - Pests	As Needed	Vendor	X	X	X	X	X	X	X	X	X	X	X	X
Common Kitchen, Laundry														
KITCHEN - Inspect Appliances	Annually	Staff										X		
Kitchen, Bath - Cabinets, fixtures	Annually	Staff										X		
Trash Dumpsters														
Empty Trash / Recycle Cans	Weekly	Vendors	X	X	X	X	X	X	X	X	X	X	X	X

Dwelling Unit Inspections Schedule and Checklist														
AGAWAM HOUSING AUTHORITY			ALL DEVELOPMENTS: 667-1, 667-2, 667-3, 667-4, 200-1, 705											
TASK	Frequency	By	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Country View Estates 667-1														
Buildings 1 -7 (Units 1-40)	Annually	Staff			X									
Colonial Haven 667-2														
Buildings 1-13 (Units 1-52)	Annually	Staff								X				
Meadow Brook Manor 667-3														
Buildings 1-6 (Units 1-64)	Annually	Staff							X					
Danahy School House 667-4														
Apts. 1-35	Annually	Staff					X							
Brady Village 200-1														
Buildings 1-12 (44 Units: 1A-12D)	Annually	Staff									X			
Wade Village 705-1														
4 Buildings (7 Units: 24-36 Even only)	Annually	Staff									X			
Annual Inspection Task – Per Development listed above.														
Living Room														
Security/Entry Door	Annually	Staff			667-1		667-4		667-3	667-2	200-1 705			
Ceiling, Walls, Floor	Annually	Staff			667-1		667-4		667-3	667-2	200-1 705			
Electrical	Annually	Staff			667-1		667-4		667-3	667-2	200-1 705			
Window, Screen, Night Latches	Annually	Staff			667-1		667-4		667-3	667-2	200-1			

											705			
Kitchen														
Security/Entry Door	Annually	Staff			667-1		667-4		667-3	667-2	200-1 705			
Ceiling, Walls, Floor	Annually	Staff			667-1		667-4		667-3	667-2	200-1 705			
Windows, Screen, Night Latches	Annually	Staff			667-1		667-4		667-3	667-2	200-1 705			
Cabinets & Countertops	Annually	Staff			667-1		667-4		667-3	667-2	200-1 705			
Electrical	Annually	Staff			667-1		667-4		667-3	667-2	200-1 705			
Electric Stove, Coils, Drip Pans, Vent	Annually	Staff			667-1		667-4		667-3	667-2	200-1 705			
Sink, Sink drainage, faucet,	Annually	Staff			667-1		667-4		667-3	667-2	200-1 705			
Bathroom														
Security	Annually	Staff			667-1		667-4		667-3	667-2	200-1 705			
Electrical	Annually	Staff			667-1		667-4		667-3	667-2	200-1 705			
Ceiling, Walls, Floor	Annually	Staff			667-1		667-4		667-3	667-2	200-1 705			
Toilet	Annually	Staff			667-1		667-4		667-3	667-2	200-1 705			
Sink	Annually	Staff			667-1		667-4		667-3	667-2	200-1 705			
Tub / Shower	Annually	Staff			667-1		667-4		667-3	667-2	200-1 705			
Bedroom 1														
Entry Door	Annually	Staff			667-1		667-4		667-3	667-2	200-1 705			
Walls, Ceiling, Floor	Annually	Staff			667-1		667-4		667-3	667-2	200-1 705			
Window, Screen, Night Latches	Annually	Staff			667-1		667-4		667-3	667-2	200-1 705			
Electrical, Lighting	Annually	Staff			667-		667-		667-	667-	200-			

					1		4		3	2	1 705			
Bedroom 2														
Entry Door	Annually	Staff									200- 1 705			
Walls, Ceiling, Floor	Annually	Staff									200- 1 705			
Window, Screen, Night Latches	Annually	Staff									200- 1 705			
Electrical, Lighting	Annually	Staff									200- 1 705			
Bedroom 3														
Entry Door	Annually	Staff									200- 1 705			
Walls, Ceiling, Floor	Annually	Staff									200- 1 705			
Window, Screen, Night Latches	Annually	Staff									200- 1 705			
Electrical, Lighting	Annually	Staff									200- 1 705			
Basement														
Security / Entry Door	Annually	Staff									200- 1 705			
Use / Space	Annually	Staff									200- 1 705			
Ceiling, Walls, Floor	Annually	Staff									200- 1 705			
Electrical	Annually	Staff									200- 1 705			
Window, Screen, Light	Annually	Staff									200- 1 705			
Dyer Ventilation	Annually	Staff									200- 1 705			
HVAC														
Adequacy	Annually	Staff			667- 1		667- 4		667- 3	667- 2	200- 1 705			
Fuel Storage	Annually	Staff			667- 1		667- 4		667- 3	667- 2	200- 1			

											705			
Condition/Safety	Annually	Staff			667-1		667-4		667-3	667-2	200-1 705			
Plumbing														
Water Pressure/Quality	Annually	Staff			667-1		667-4		667-3	667-2	200-1 705			
Water Heater	Annually	Staff			667-1		667-4		667-3	667-2	200-1 705			
Water Temperature	Annually	Staff			667-1		667-4		667-3	667-2	200-1 705			
Plumbing/Piping	Annually	Staff			667-1		667-4		667-3	667-2	200-1 705			
Sewer/Septic	Annually	Staff			667-1		667-4		667-3	667-2	200-1 705			
Gas Fittings	Annually	Staff			667-1		667-4		667-3	667-2	200-1 705			
General Health & Safety														
Access/Egress/Security	Annually	Staff			667-1		667-4		667-3	667-2	200-1 705			
Interior Halls/Stairs	Annually	Staff			667-1		667-4		667-3	667-2	200-1 705			
Gargage/Debris/Clean	Annually	Staff			667-1		667-4		667-3	667-2	200-1 705			
Infestation	Annually	Staff			667-1		667-4		667-3	667-2	200-1 705			
Paint Condition	Annually	Staff			667-1		667-4		667-3	667-2	200-1 705			
Electrical	Annually	Staff			667-1		667-4		667-3	667-2	200-1 705			
Smoke Detectors	Annually	Staff			667-1		667-4		667-3	667-2	200-1 705			
Emergency Lighting	Annually	Staff			667-1		667-4		667-3	667-2	200-1 705			
Interior Air Quality	Annually	Staff			667-1		667-4		667-3	667-2	200-1 705			

Asbestos	Annually	Staff			667-1		667-4		667-3	667-2	200-1 705			
Dampness/Wet	Annually	Staff			667-1		667-4		667-3	667-2	200-1 705			
Handicap Suitability	Annually	Staff			667-1		667-4		667-3	667-2	200-1 705			
Other Interior Hazards	Annually	Staff			667-1		667-4		667-3	667-2	200-1 705			
Exterior														
Roof	Annually	Staff			667-1		667-4		667-3	667-2	200-1 705			
Gutters, Drains, Siding, Trim	Annually	Staff			667-1		667-4		667-3	667-2	200-1 705			
Porches, Stairs, Rails	Annually	Staff			667-1		667-4		667-3	667-2	200-1 705			
Foundation	Annually	Staff			667-1		667-4		667-3	667-2	200-1 705			
Yard, Site, Parking, Walking	Annually	Staff			667-1		667-4		667-3	667-2	200-1 705			
Battery Heat / Smoke Detectors														
Inspect Condition	Annually	Staff			667-1		667-4		667-3	667-2	200-1 705			
Inspect System Heat thermostats (in Units)	Annually	Staff			667-1		667-4		667-3	667-2	200-1 705			
Pest control														
Inspect Unit	Annually	Staff			667-1		667-4		667-3	667-2	200-1 705			

Development Information						
Development No.		667-1	667-2	667-3	667-4	200-1 / 200-2
Year Built		1963	1968	1972	1948 / 1988 Addition	1948
Development Name & Address		Country View Estates. 95 N. Westfield St.	Colonial Haven 885 Main St.	Meadow Brook Manor. 66 Meadow Brook Manor	Danahy School House Apts. 51 Maple St.	Brady Village 775 Springfield St.
Major Renovation (Year ONLY).		2011, 2014, 2018	2014, 2015, 2016	2002, 2011, 2019	1987, 2009, 2016	2008, 2011, 2017, 2019
Check the Box if applicable		CHECK BOX	CHECK BOX	CHECK BOX	CHECK BOX	CHECK BOX
No of Floors	1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	2 – 4	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	4 – 6	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	+ 8	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
No of Units	40	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	52	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	64	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	35	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Facilities	Community Rm	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	Laundry	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	Main Office	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Reception	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Maintenance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Storage	Garage	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
	Storage Shed	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Container	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Off-Site	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Roof Systems	Shingles	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	EPDM	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	Metal	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	BUR	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Building Systems	Elevator	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Chair Lift	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Generator	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Access Control	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fire Safety Systems	Fire Alarm	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Monitored	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Fire Pump	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Sprinklers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Heat	Gas	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Propane	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Co-Gen	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Electric	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Hot Water	Gas	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Propane	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Co-Gen	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Electric	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Provide Development Details. Check Applicable Boxes						
Development No.		705-1	Click here to enter text.	Click here to enter text.	Click here to enter text.	Click here to enter text.
Year Built		1989	Click here to enter text.	Click here to enter text.	Click here to enter text.	Click here to enter text.
Development Name & Address		Wade Village 24-36 Franklin St.	Click here to enter text.	Click here to enter text.	Click here to enter text.	Click here to enter text.
Major Renovation (Year ONLY).		2016	Click here to enter text.	Click here to enter text.	Click here to enter text.	Click here to enter text.
Check the Box if applicable		CHECK BOX	CHECK BOX	CHECK BOX	CHECK BOX	CHECK BOX
No of Floors	1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	2 – 4	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	4 – 6	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	+ 8	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
No of Units	1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	7	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Facilities	Community Rm	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Laundry	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Main Office	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Reception	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Maintenance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Storage	Garage	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Storage Shed	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Container	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Off-Site	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Roof Systems	Shingles	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	EPDM	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Metal	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	BUR	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Building Systems	Elevator	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Chair Lift	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Generator	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Access Control	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fire Safety Systems	Fire Alarm	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Monitored	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Fire Pump	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Sprinklers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Heat	Gas	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Propane	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Co-Gen	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Electric	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Hot Water	Gas	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Propane	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Co-Gen	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Electric	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Building Systems

HEATING SYSTEMS

Electric Heat – 667-1, 667-2, 667-3						
Heating System	Baseboard		Wall Heater		Heat Pumps	
1 Unit per 1 Apartment	Yes <input checked="" type="checkbox"/>	No <input type="checkbox"/>	Yes <input checked="" type="checkbox"/>	No <input type="checkbox"/>	Yes <input checked="" type="checkbox"/>	No <input type="checkbox"/>
1 Unit per Building	Yes <input type="checkbox"/>	No <input type="checkbox"/>	Yes	No <input type="checkbox"/>	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Serviced by:	Serviced by (Phone #):		On-Call Contract			
Turnbull Electric	413-786-4528		Yes: <input type="checkbox"/> No: <input checked="" type="checkbox"/>			
Northup Electric HVAC	413-786-8930		Yes: <input type="checkbox"/> No: <input checked="" type="checkbox"/>			

Oil / Gas Heat – 667-4, 200-1/200-2, 705		
Heating System	Oil-Fired	Gas-Fired
Heating System	<input type="checkbox"/>	<input checked="" type="checkbox"/>
1 Unit per 1 Apartment	Yes <input checked="" type="checkbox"/>	No <input type="checkbox"/>
1 Unit per Building	Yes <input checked="" type="checkbox"/>	No <input type="checkbox"/>
Serviced by:	Serviced by (Phone #):	On-Call Contract
CLARK HVAC	413-786-8443	Yes: <input checked="" type="checkbox"/> No: <input type="checkbox"/>

HOT WATER SYSTEMS

Hot Water	Electric <input type="checkbox"/>	Oil <input type="checkbox"/>	Gas <input type="checkbox"/>
1 Unit per 1 Apartment	Yes <input checked="" type="checkbox"/>	No <input type="checkbox"/>	
1 Unit per Building	Yes <input checked="" type="checkbox"/>	No <input type="checkbox"/>	
LHA-Owned / Rented	Rented <input checked="" type="checkbox"/>	LHA-Owned <input checked="" type="checkbox"/>	
Rent 2 Hot water tanks	In the laundry room for 667-2	New England Water Company	
Serviced by:	Serviced by (Phone #):	On-Call Contract	
CLARK HVAC	413-786-8443	Yes: <input type="checkbox"/> No: <input checked="" type="checkbox"/>	
Northup Electric Hvac	413-786-8930	Yes: <input type="checkbox"/> No: <input checked="" type="checkbox"/>	
Boulanger's Plumbing	413-527-3240	Yes: <input type="checkbox"/> No: <input checked="" type="checkbox"/>	

ROOF SYSTEMS

DEV #: 667-1	Install Date	Warranty	Shingle	EPDM	Metal	BUR
Address: 95 N.Westfield St.	2006	Yes <input checked="" type="checkbox"/>	Yes <input checked="" type="checkbox"/>	Yes <input type="checkbox"/>	Yes <input type="checkbox"/>	Yes <input type="checkbox"/>
DEV #: 667-2	Install Date	Warranty	Shingle	EPDM	Metal	BUR
Address: 885 Main St	2000	Yes <input checked="" type="checkbox"/>	Yes <input checked="" type="checkbox"/>	Yes <input type="checkbox"/>	Yes <input type="checkbox"/>	Yes <input type="checkbox"/>
DEV #: 667-3	Install Date	Warranty	Shingle	EPDM	Metal	BUR
Address: 66 MeadowBrook Manor	2009	Yes <input checked="" type="checkbox"/>	Yes <input checked="" type="checkbox"/>	Yes <input type="checkbox"/>	Yes <input type="checkbox"/>	Yes <input type="checkbox"/>
DEV #: 667-4	Install Date	Warranty	Shingle	EPDM	Metal	BUR
Address: Danahy School House	1985	Yes <input type="checkbox"/>	Yes <input checked="" type="checkbox"/>	Yes <input type="checkbox"/>	Yes <input type="checkbox"/>	Yes <input type="checkbox"/>
DEV #: -200-1	Install Date	Warranty	Shingle	EPDM	Metal	BUR
Address: 775 Springfield St.	1994	Yes <input type="checkbox"/>	Yes <input checked="" type="checkbox"/>	Yes <input type="checkbox"/>	Yes <input type="checkbox"/>	Yes <input type="checkbox"/>
DEV #: 705-1	Install Date	Warranty	Shingle	EPDM	Metal	BUR
Address: 24-36 Franklin St	1985	Yes <input type="checkbox"/>	Yes <input checked="" type="checkbox"/>	Yes <input type="checkbox"/>	Yes <input type="checkbox"/>	Yes <input type="checkbox"/>

FIRE PROTECTION (SPRINKLER AND FIRE ALARM SYSTEMS)

Fire Alarm System:	Non-Addressable	Addressable Monitored	Phone	Cell
If YES, Check Box	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
System Name	SILENT KNIGHT		Install Date: 2012	
FD Radio Connection	Alerted by IBS Electronics & Security		Last Test: 10/03/2019	
Under Warranty?	Yes: <input type="checkbox"/>		No: <input checked="" type="checkbox"/>	
Service Company	I.B.S.	SPLFD MA 413-739-2271		

ELEVATORS / CHAIR LIFTS

Elevator:		Elevator #1	Elevator #2	Elevator #3	Elevator #4
If YES, Check Box		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Type	Hydraulic	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Traction	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Brand Name:		Elevator Systems State ID# 6-P-13 ID# 10025-1			
Year Installed:		1987	Click here to enter text.	Click here to enter text.	Click here to enter text.
Inspected Date		Feb. 2020			
Serviced / Maintained by: Include Phone Number		BAYSTATE ELEVATOR 275 Silver Street, Agawam, MA 01001 786-7000			

GFCI, ARC FAULT PROTECTION, ELECTRIC PANELS

GFCI	Kitchen	Bathroom	Exterior	Other
	Yes <input checked="" type="checkbox"/>	Yes <input checked="" type="checkbox"/>	Yes <input checked="" type="checkbox"/>	Yes <input type="checkbox"/>
Tamper-Resistant	Yes <input type="checkbox"/> No <input type="checkbox"/>			
Arc Fault Protection	Kitchen	Bathroom	Bedrooms	Living
	Yes <input type="checkbox"/>	Yes <input type="checkbox"/>	Yes <input type="checkbox"/>	Yes <input type="checkbox"/>
Tamper-Resistant	Yes <input type="checkbox"/> No <input type="checkbox"/>			
Electric Panels	Federal Pacific		In Closet	
	Yes <input checked="" type="checkbox"/>	No <input type="checkbox"/>	Yes <input checked="" type="checkbox"/>	No <input type="checkbox"/>
Amps	60 <input checked="" type="checkbox"/>	100 <input checked="" type="checkbox"/>	Other 400AMP	

EXTERIOR AND COMMON LIGHTING

Lighting:	Exterior (Wall mount)	Exterior (Pole Mount)	Entry Ways	Hallways
LED (Arrays)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
LED (Medium Base)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Incandescent	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Halogen	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
HPS / LPS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

OTHER

Laundry Rooms		
Property	Washers	Dryers
Country View	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Colonial Haven	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Meadowbrook Manor	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Danahy Schoolhouse	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Serviced By:	Serviced by (Phone #):	On Call Contact
Automatic Laundry	888-699-2035	Yes: <input type="checkbox"/> No: <input checked="" type="checkbox"/>
Affordable Duct Cleaning	413-786-9853	Yes: <input type="checkbox"/> No: <input checked="" type="checkbox"/>

Vehicles & Small Engines		
MAKE	MODEL	YEAR
Ford	F350	2008
Ford	F250	2018
Ford	F350 Dump	2008
John Deere	Lawn Mower	2014
Ventrac	Snow Machine	2018
Serviced By:	Serviced by (Phone #):	On Call Contact
Sarat Ford Lincoln	413-206-2035	Yes: <input type="checkbox"/> No: <input checked="" type="checkbox"/>
Taplin Power Equipment	413-781-4352	Yes: <input type="checkbox"/> No: <input checked="" type="checkbox"/>

VENDOR LIST		
NAME	ADDRESS	PHONE
CLARK HVAC	15 Barbara Lane Feeding Hills, MA 01033	1-413-786-8443
NORTHUP ELECTRICAL PLUMBING	73 Bowles Road Agawam, MA 01001	1-413-786-8930
BOULANGERS PLUMBING & HEATING	373 Main Street Easthampton, MA 01027	1-413-536-8845
NEW ENGLAND WATER COMPANY	P.O. Box 1485 Littleton, MA 01460	1-800-445-5523
I.B.S. ELECTRIC	225 Armory Street Springfield, MA 01104	1-413-739-2271
TECH ROOFING	896 Sheridan Street Chicopee, MA 01020	1-413-331-5667
BAYSTATE ELEVATOR	275 Silver Street Agawam, MA 01001	1-413-786-7000
AFFORDABLE DUCT CLEANING	80 S. Ramah Circle Agawam, MA 01001	1-413-786-9853
AUTOMATIC LAUNDRY	45 Border Street West Newton, MA 02465	1-617-969-4340
SARAT FORD LINCOLN	245 Springfield Street Agawam, MA 01001	1-413-206-2035
TAPLIN YARD, PUMP & POWER EQUIPMENT	197 Main Street Agawam, MA 01001	1-413-781-4352
BRAMAN INSECT & PEST CONTROL	147 Almgren Drive Agawam, MA 01001	1-800-338-6757

Maintenance Plan (Program and Policy)

1. Introduction

This document outlines the Agawam Housing Authority maintenance program and procedures.

Description of AHA Developments:

667-1

Country View Estates, located at 95 North Westfield St., this development has 40 one-bedroom apartments. These units are in 7 one-story buildings with each apartment having a front and back door opening directly to the outside. This site also includes a stand-alone community building, with laundry facilities, public bathrooms and a small kitchen. There is also a maintenance workshop located beneath building 4.

667-2

Colonial Haven Apts., Located at 885 Main St., this development has 52 one-bedroom apts. These units are in 13 one-story buildings with each apt having a front and back door opening directly to the outside. This also includes a stand-alone community building, with laundry facilities, public bathrooms and a small kitchen. There is also a free-standing maintenance shed.

667-3

Meadowbrook Manor Apts. located at 66 Meadowbrook Manor. This development has 64 one-bedroom apts. These units are in six two story buildings, with each apt. having a front and back entrance. The site includes a stand-alone building consisting of a laundry facility, public bathrooms, kitchen, gathering area, and AHA office. This property also has a garage, used as maintenance headquarters for all properties.

667-4

Danahy School House Apts., located at 51 Maple St., this development has 35 one-bedroom apts., These units are in one three story building. Each apt has one entrance leading to a common hall and an elevator. Of the 35 apts., 10 are congregate units with shared kitchen and bath areas. Building also has a laundry facility, public bathrooms and another kitchen area. The first level has a maintenance room and boiler room.

200-1

Brady Village Apts., located at 775 Springfield St., this development has a total of 44 town house units, 8 three bedroom, 36 two bedrooms. These units are in 12 two story buildings. Each apt has afffront and rear entrance directly to the outside.

705-1

Wade Village, located at 24-36 Franklin St., this development has a total of four stand-alone buildings. One 3-bedroom single family ranch style home, and three side by side duplex 3-bedroom homes. This property also has a maintenance garage used for storage.

2. Staffing

Agawam Housing Authority has 3 FT maintenance.

Agawam has 3FT administrative, including the Executive Director

3. Tracking of Maintenance Work

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

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

The maintenance person completing a work order is responsible for updating/completing the work order from the computerized work order system.

4. Routine Maintenance

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

a) Interior of the Community Building

At least twice times a week, the Maintenance Supervisor will conduct a visual inspection of the community room, laundry room and public bathrooms. Based on this visual inspection, these areas will receive the custodial attention needed to keep these areas clean, attractive and hazard free. These tasks will include but not be limited to: vacuuming, sweeping, dry moping and washing the kitchen/laundry/bathroom floors, washing down the laundry areas sink, washing machines and dryers and emptying the waste baskets, washing all glass and door surfaces, cleaning the public bathrooms and restocking toilet paper, paper towels and soap and emptying the waste baskets, dry moping and washing the community room floor, emptying the waste baskets and cleaning the kitchen.

All surfaces in the laundry and public bathrooms will be thoroughly washed and disinfected. As necessary these floors will be washed and buffed to keep their appearance neat and clean.

b) Exterior

Daily, the Maintenance Supervisor should inspect the sites walkways and parking areas. As necessary, these areas should be broom cleaned and free of any visible trash or tripping hazards. The lawns will be mowed as necessary to keep the grass height below 3 inches. In the spring and fall all grass area should be thoroughly raked and cleaned to

remove the accumulation of dead grass, leaves and other debris. The plantings around the site should be kept neatly trimmed and free of trash and debris.

During the winter months, all walkways and parking areas will be kept free and clear of snow and ice. If snow and ice conditions occur outside of the normal workday and workweek, the maintenance staff will report to the Administrative Office for snow and ice removal purposes and will be dispatched to this location by the Maintenance Supervisor. The walkways will be handled using the snow blower assigned to the site and hand tools. Other AHA maintenance staff will handle the areas of the site that can be cleaned by a plow. Prior to the start of each winter season the Maintenance Supervisor and Executive Director will meet and walk the site to determine if any adjustments are needed to the snow removal plan for the site.

Trash removal at the site is provided by an outside contractor hired by the Authority. Residents are responsible for placing their household trash in barrels provided by the Authority and stored at designated sites throughout property. The barrels will be weekly at the designated pick-up area, by the contracted trash removal company. As needed the barrels will be cleaned and disinfected by the Authority's maintenance staff.

5) Annual Unit Inspections

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

6) Preventive Maintenance

Because of the complexity of the AHA mechanical systems at this site preventive maintenance is provided through a combination of outside contractors and AHA staff.

a) Fire Protection

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

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

b) Roof

Each building is equipped with shingle roofs. In the fall and spring of each year, the maintenance staff should conduct a visual inspection of the roofs. During the inspection, the staff person is looking for any lifting shingles or loose flashing. At the same time, the maintenance person will make certain all of the roof drains and gutters appear to be free and clear of any obstructions. Any problems observed during this inspection should be brought to the immediate attention of the Maintenance Supervisor.

c) Exterior Masonry

In the spring and fall, the maintenance staff will conduct a visual inspection, of the building's masonry and concrete. Look for gaps in the mortar, spalling bricks, spalling in the concrete vertical and horizontal surfaces.

d) Space Heating

The heat at Country View Estates, Colonial Haven & Meadowbrook Manor is electric baseboard heating. The heat at Danahy Schoolhouse is forced gas fired hot water system. There is 1 boiler serving the Danahy Schoolhouse. Prior to the start of each heating season, the boilers will be serviced by an outside contractor to make certain they are in proper working condition. The electric heat systems at Country View Estates, Colonial Haven and Meadowbrook Manor vents will be cleaned yearly by Maintenance staff. During unit inspections and the inspection of the common areas, the building maintenance person should make certain the heating elements and thermostats in all units are operating correctly. On a weekly basis, during the heating season, a maintenance staff member should conduct a visual inspection of these AHA boiler rooms to spot any obvious leaks and to detect any abnormal sounds in the circulator motors associated with this system. At Brady Village there is a gas fired forced hot air system in each building with a total of 12. At Wade Village each apartment has a combo gas fired heat & hot water system. Wade Village systems are serviced once a year by a vendor. These systems are within tenant apartments and are checked on an annual basis during Annual Inspections to ensure the systems are working properly.

e) Domestic Hot Water

At Danahy Schoolhouse the domestic hot water is heated by natural gas in one boiler room, for the building. On a weekly basis, a maintenance person will conduct a visual inspection of this AHA mechanical area to spot any obvious leaks and to detect any abnormal sounds in the circulator motors associated with this system. On an annual basis, the boilers should be inspected by the authority's HVAC contractor to make certain the equipment is operating within the appropriate operating parameters. At Country View Estates, Meadowbrook Manor & Colonial Haven, the domestic hot water is provided by electric hot water heaters, on a monthly basis, a maintenance person will conduct a visual inspection of this AHA mechanical area to spot any obvious leaks and to detect any

abnormal sounds in the circulator motors associated with this system. On an annual basis, the boilers should be inspected by the authority's HVAC contractor to make certain the equipment is operating within the appropriate operating parameters. At Brady Village there is a gas fired forced hot water system in each building with a total of 12. At Wade Village each apartment has a combo gas fired heat & hot water system. Wade Village systems are serviced once a year by a vendor. These systems are within tenant apartments and are checked on an annual basis during Annual Inspections to ensure the systems are working properly.

f) Plumbing & Electrical Repairs

The AHA maintenance staff is expected to have the skills necessary to perform most minor plumbing and electrical repairs such as repairing a leaking faucet or a defective light switch. When the maintenance staff encounter a plumbing or electrical problem they are not trained to handle or are comfortable with they are to contact the Executive Director. Based on the nature of the problem, the Maintenance Supervisor/Executive Director will authorize calling in an outside plumber or electrician.

g) Extermination/Pest Control

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

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

7) Vacancy Turnaround

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

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

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

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

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

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

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

8) Maintenance Charges

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

A written itemized bill will be sent to resident. Failure to promptly pay a maintenance charge or enter into and keep a repayment agreement for said charge is grounds for eviction. A resident may appeal the assessment of a maintenance charge to the Executive Director.

9) Definition of Maintenance Emergencies

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

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 09/30/2019. It also shows the approved budget for the current year (2020) 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 Agawam Housing Authority operating reserve at the end of fiscal year 2019 was \$431,296.00, which is 72.3% 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 Agawam Housing Authority.						
REVENUE						
Account Number	Account Class	2019 Approved Revenue Budget	2019 Actual Amounts Received	2020 Approved Revenue Budget	% Change from 2019 Actual to 2020 Budget	2020 Dollars Budgeted per Unit per Month
3110	Shelter Rent - Tenants	\$985,000.00	\$980,835.00	\$993,679.00	1.3%	\$342.18
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	\$500.00	\$449.00	\$500.00	11.4%	\$0.17
3611	Interest on Investments - Restricted	\$0.00	\$0.00	\$0.00	0%	\$0.00
3690	Other Revenue	\$13,500.00	\$11,431.00	\$13,500.00	18.1%	\$4.65
3691	Other Revenue - Retained	\$20,000.00	\$41,111.00	\$26,000.00	-36.8%	\$8.95
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)	\$286,281.00	\$242,975.00	\$420,441.00	73%	\$144.78
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	\$2,500.00	\$0.00	-100%	\$0.00
3000	TOTAL REVENUE	\$1,305,281.00	\$1,279,301.00	\$1,454,120.00	13.7%	\$500.73

Consolidated Budget (400-1) for all state-aided 667 (Elderly), 200 (family), and 705 (scattered site family) developments owned by Agawam Housing Authority.						
EXPENSES						
Account Number	Account Class	2019 Approved Expense Budget	2019 Actual Amounts Spent	2020 Approved Expense Budget	% Change from 2019 Actual to 2020 Budget.	2020 Dollars Budgeted per Unit per Month
4110	Administrative Salaries	\$170,144.00	\$170,013.00	\$173,652.00	2.1%	\$59.80
4120	Compensated Absences	\$0.00	\$4,388.00	\$0.00	-100%	\$0.00
4130	Legal	\$9,000.00	\$2,636.00	\$9,000.00	241.4%	\$3.10
4140	Members Compensation	\$3,900.00	\$3,463.00	\$3,900.00	12.6%	\$1.34
4150	Travel & Related Expenses	\$4,900.00	\$1,395.00	\$4,900.00	251.3%	\$1.69
4170	Accounting Services	\$10,356.00	\$10,356.00	\$10,668.00	3%	\$3.67
4171	Audit Costs	\$4,410.00	\$3,780.00	\$4,410.00	16.7%	\$1.52
4180	Penalties & Interest	\$0.00	\$0.00	\$0.00	0%	\$0.00
4190	Administrative Other	\$39,845.00	\$38,640.00	\$44,445.00	15%	\$15.30
4191	Tenant Organization	\$1,452.00	\$0.00	\$1,452.00	100%	\$0.50
4100	TOTAL ADMINISTRATION	\$244,007.00	\$234,671.00	\$252,427.00	7.6%	\$86.92
4310	Water	\$46,250.00	\$45,303.00	\$46,250.00	2.1%	\$15.93
4320	Electricity	\$304,500.00	\$271,397.00	\$304,500.00	12.2%	\$104.86
4330	Gas	\$24,310.00	\$21,870.00	\$24,310.00	11.2%	\$8.37
4340	Fuel	\$0.00	\$0.00	\$0.00	0%	\$0.00
4360	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	\$105,000.00	\$103,235.00	\$105,000.00	1.7%	\$36.16
4392	Net Meter Utility Credit (Negative Amount)	\$-123,000.00	\$-124,408.00	\$-123,000.0	-1.1%	\$-42.36
4300	TOTAL UTILITIES	\$357,060.00	\$317,397.00	\$357,060.00	12.5%	\$122.95

Consolidated Budget (400-1) for all state-aided 667 (Elderly), 200 (family), and 705 (scattered site family) developments owned by Agawam Housing Authority.						
EXPENSES						
Account Number	Account Class	2019 Approved Expense Budget	2019 Actual Amounts Spent	2020 Approved Expense Budget	% Change from 2019 Actual to 2020 Budget	2020 Dollars Budgeted per Unit per Month
4410	Maintenance Labor	\$194,746.00	\$159,571.00	\$197,275.00	23.6%	\$67.93
4420	Materials & Supplies	\$93,000.00	\$72,024.00	\$99,000.00	37.5%	\$34.09
4430	Contract Costs	\$119,800.00	\$131,906.00	\$149,800.00	13.6%	\$51.58
4400	TOTAL MAINTENANCE	\$407,546.00	\$363,501.00	\$446,075.00	22.7%	\$153.61
4510	Insurance	\$51,400.00	\$51,091.00	\$60,400.00	18.2%	\$20.80
4520	Payment in Lieu of Taxes	\$4,000.00	\$3,859.00	\$4,000.00	3.7%	\$1.38
4540	Employee Benefits	\$195,021.00	\$209,035.00	\$207,620.00	-0.7%	\$71.49
4541	Employee Benefits - GASB 45	\$0.00	\$-292,514.00	\$0.00	-100%	\$0.00
4542	Pension Expense - GASB 68	\$0.00	\$16,903.00	\$0.00	-100%	\$0.00
4570	Collection Loss	\$10,000.00	\$13,896.00	\$10,000.00	-28%	\$3.44
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	\$260,421.00	\$2,270.00	\$282,020.00	12323.8%	\$97.11
4610	Extraordinary Maintenance	\$10,000.00	\$350.00	\$48,400.00	13728.6%	\$16.67
4611	Equipment Purchases - Non Capitalized	\$0.00	\$0.00	\$20,000.00	100%	\$6.89
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	\$368,229.00	\$0.00	-100%	\$0.00
4600	TOTAL OTHER EXPENSES	\$10,000.00	\$368,579.00	\$68,400.00	-81.4%	\$23.55
4000	TOTAL EXPENSES	\$1,279,034.00	\$1,286,418.00	\$1,405,982.00	9.3%	\$484.15

Consolidated Budget (400-1) for all state-aided 667 (Elderly), 200 (family), and 705 (scattered site family) developments owned by Agawam Housing Authority.						
SUMMARY						
Account Number	Account Class	2019 Approved Budget	2019 Actual Amounts	2020 Approved Budget	% Change from 2019 Actual to 2020 Budget	2020 Dollars Budgeted per Unit per Month
3000	TOTAL REVENUE	\$1,305,281.00	\$1,279,301.00	\$1,454,120.00	13.7%	\$500.73
4000	TOTAL EXPENSES	\$1,279,034.00	\$1,286,418.00	\$1,405,982.00	9.3%	\$484.15
2700	NET INCOME (DEFICIT)	\$26,247.00	\$-7,117.00	\$48,138.00	-776.4%	\$16.58
7520	Replacements of Equip. - Capitalized	\$33,500.00	\$39,829.00	\$0.00	-100%	\$0.00
7540	Betterments & Additions - Capitalized	\$0.00	\$0.00	\$0.00	0%	\$0.00
7500	TOTAL NONOPERATING EXPENDITURES	\$33,500.00	\$39,829.00	\$0.00	-100%	\$0.00
7600	EXCESS REVENUE OVER EXPENSES	\$-7,253.00	\$-46,946.00	\$48,138.00	-202.5%	\$16.58

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 \$40.00 per unit per month, as of July 1, 2019.

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 6/30/19, all deficit LHAs may keep 100% of the net meter credit savings.

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 be 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 6/30/19 all LHAs may retain 100% of their total net meter credit savings, and should report those savings as Other Revenue – Retained on line #3691

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: 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.

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 2019 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 Agawam Housing Authority's understanding of why they received the rating, while the responses describe their goals and the means by which they will meet or improve upon the performance-based assessment standards established by DHCD in the PMR. When the PMR rating is 'Operational Guidance', the LHA may have responded, but was not required to.

Category: Management

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

Rating: No Findings

Reason: The 705 rating was a result of one unit left abandoned, and the administrative transfer of a family previously housed in the 200 development.

Response: The actions taken to identify an abandonment have been minimized ambiguity and miscommunication. The transfer application was a series of misunderstandings and miscommunications that were not well handled.

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: Corrective Action

Reason: The AHA follows protocols to collect rents including private conference notices for conferences regarding late rent, court filings, and appearances.

Response: The AHA is still following protocols to collect rents as required by regulation.

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

Rating: Operational Guidance

Reason: The ED for the AHA is responsible for the submissions of statements and certifications. More than once, the ED forgot to submit the reports or certifications.

Response: The ED has a schedule of submissions and certifications entered into an electronic calendar. An electronic reminder is sent to prompt the ED to perform the submissions and certifications in a timely manner.

Criterion: Completion of mandatory online board member training

Rating: Corrective Action

Reason: As a volunteer Board, there is nothing that is done to encourage the members to complete the training aside from reminders at meetings and emails.

Response: The ED will continue to encourage the members to complete the training in a timely fashion.

DHCD response for the Management Category:

The AHA received a rating of "corrective Action" in the Tenant Accounts Receivable (TAR) category because TAR data was not submitted to the DHCD application system by the deadline, therefore an evaluation of the data could not be performed.

Category: Financial

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

Rating: No Findings

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

Rating: No Findings

Category: Capital Planning

Criterion: Capital Improvement Plan (CIP) submitted on time.

Rating: Operational Guidance

Reason: The Capital Plan was submitted at the time the budget was submitted. The budget was submitted months after the start of the AHA fiscal year because of the inefficiency of the administrative supports in Boston.

Response: The AHA will submit the Capital Plan when it is finished.

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

Rating: No Findings

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	2	2
Tenant related violations	1	1

Category: Facility Management - Inspections

Criterion: LHA Conducted 100% of the Unit Inspections.

Rating: Corrective Action

Reason: One unit was inspected when it was turned over by maintenance. The tenant who was to occupy the unit was hospitalized for several months. The months the unit was not occupied and the time between the unit turnover inspection and the annual inspection. The maintenance department did not perform the annual inspection because there has not been someone living in the unit. The AHA had been consistently made aware of the condition of the unit by the family of the hospitalized tenant. It was a waste of time to inspect an unoccupied unit.

The other unit was identified as a problem because the inspection was not completed because the tenant was dead but her belongings had not been removed yet.

The final identified failure was an inspection done as unit turnover inspection and timing lent itself to have the same unit be in the mix for the annual inspection. It was completed to find tenant had been rough on the unit and not informed the AHA of damages.

Response: There is nothing proactive the AHA can do about the lack of communication between tenants and the AHA relating to the condition of their unit. The protocols followed to begin work on a unit after a death is the AHA waits for the keys to be returned for possession. We do not enter the unit during the time between notification the tenant has passed and when we take possession.

There are some units that will be inspected twice in a short period of time between the move-in date and the inspection cycle falls.

The most important identified failure by the AHA is the most difficult to understand. The hospitalization of a tenant does not mean there is not an occupant just noting in the unit to inspect. The decision was made to skip the unoccupied unit because we had been made aware of the condition of the unit by the family who came to pay the rent and provide updates on the progress being made to return to her new unit.

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

Rating: Corrective Action

Reason: There were no repairs left undone. This is wrong

Response: There are no work orders left unfinished.

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

Rating: Corrective Action

Reason: This is wrong. The work orders generated by unit inspections are done within the allocated time frame.

Response: There are no steps to take as the work orders that are generated are done so within the allocated time.

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

Rating: No Findings

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: No Findings

DHCD response for the Facility Management - Inspections Category:

The PMR scheduling letter was dated and received by the AHA on 12/5/2019. The PMR was scheduled and conducted on 1/9/2020. On January 7, 2020, the DHCD office sent out a "24 hour notice" that reiterated the information within the scheduling letter and also stated: "To expedite the on-site visit, please prepare in advance the following: 1) Please make copies of the Inspection Reports and corresponding Work Orders for the following units...."****Please inform us if any of the selected units were not occupied during your annual inspections***" DHCD FMS will select a different unit for the PMR, if we are notified in advance that the unit was vacant during the time of inspections. DHCD staff were not notified that the unit was vacant until the PMR exit interview. Additionally, on arrival, there were some printed documents but not the required inspection reports. AHA did not follow the instructions per the 24 Hour Notice resulting in a Corrective Action rating.

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: Corrective Action

Reason: The comprehensive work order system was given to the inspection team was exactly the template provided to the AHA at a training. The information given to the AHA was that the template was what was needed to satisfy the PMR. The department issued template was not satisfactory to the PMR.

Response: The AHA has recreated the template to satisfy the requirements of the PMR

Criterion: Routine work orders should be identified, tracked, reportable and completed 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: No Findings

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

Additional Remarks:

The PMR inspector would not take the time to listen to the explanation of the inspection findings saying that it was late in the day. The team was 20 minutes late arriving at the housing authority so the extra time to listen to the explanation should not have been an imposition. When the ED pressed the inspector to take the time to listen she was told, "We can call Laura Taylor if you would like". Unsure as to why that was a relevant statement, the ED asked why? The inspector asked the second member of the team if "calling Laura Taylor was a good idea?" The exchange was making the second team member uncomfortable. No resolution was agreed on because the inspector began to put his equipment away in preparation to leave.

The request for a reasonable accommodation from a tenant does not have to come in a formal manner. This HA does not change or alter a unit if it will upset or agitate the tenant. That practice will not change.

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

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 Improvement Plan (CIP) Submitted	<p>Housing authorities are required to submit a five-year capital plan every year.</p> <ul style="list-style-type: none"> • "No Findings" =Submitted on time and no modifications required or modifications made within 45 days. • "Operational Guidance" =Up to 45 days late and no modifications required or modifications made within 45 days. • "Corrective Action" =More than 45 days late or modifications required and not completed within 45 days.
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 Agawam Housing Authority:

Policy	Last Ratified by Board Vote	Notes
*Rent Collection Policy	08/19/2014	
*Personnel Policy	03/18/2014	
*Capitalization Policy	02/16/2016	
*Procurement Policy	02/16/2016	
*Grievance Policy	01/01/2010	This is a piece of the State Lease-
Smoking Policy	07/24/2014	
Credit/Debit Card Policy	10/17/2016	
Emergency Response Plan	12/17/2016	Approved as Part of Human Resources Manual.
Other – Define in the ‘Notes’ column	04/06/2016	Abandonment Policy Approved
Travel Policy	12/17/2016	Approved as Part of Human Resource Manual.
Parking	12/21/2019	

* Starred policies are required by DHCD. Policies without a “Latest Revision” date are not yet in force.

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

Waivers

Agawam Housing Authority has received the following waivers from DHCD's regulations. This list does not include vacancy waivers, pet waivers, or any waivers that would release personally identifiable tenant or applicant data.

Description	Reason	Date Waiver Approved by DHCD	Date Expired
Waiver to join RCAT	Assistance in timely execution of capital projects	07/10/2019	07/10/2022

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

Glossary

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

AHVP: Alternative Housing Voucher Program

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

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

ANUEL: Allowable Non-Utility Expense Level

AP: Annual Plan

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

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

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

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

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

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

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

CNA: Capital Needs Assessment

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

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

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

DHCD: Massachusetts Department of Housing & Community Development

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

FF: Formula Funding

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

FYE: Fiscal Year End

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

HHA: Host Housing Authority for the RCAT program.

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

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

LHA: Local Housing Authority

LTO: Local Tenants Organization

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

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

MOR: Management and Occupancy Report

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

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

- July Meeting Minutes show no Tenant Communication
- Tenant Satisfaction Survey
- Performance Management Review

Agawam Housing Authority
Regular Board Meeting
July 20, 2020

Members of the Agawam Housing Authority met virtually via GoToMeeting session on July 20, 2020 at 6:08 P.M.

A copy of the notice of this meeting was electronically filed on the Agawam Housing Authority website, along with the notice of service of the same are filed with the minutes and made a part hereof.

The July Board meeting met the standards of compliance.

Present:

Commissioner Ronghi
Commissioner Hall-Gibbons
Commissioner Stickles
Commissioner Prince

Not Present:

Commissioner Hottin

Also Present:

Maureen Cayer
Pat Cove

The Roll was called, and 4 Commissioners were present at 6:00 PM.

Agenda Item #1

A. Old Business

1. Approval of Regular Board Meeting Minutes of May 18, 2020. Commissioner Prince made a motion to accept the minutes of the May 18, 2020 as presented. Commissioner Ronghi seconded the motion. Three Commissioners were in favor. Commissioner Stickles abstained from the vote.

2. Approval of the check register from May 19, 2020 – June 15, 2020. No questions were asked. Commissioner Prince made a motion to accept the May 19, 2020- June 15, 2020 check register as presented. The second check register for Board approval is from June 16, 2020- July 15, 2020. Commissioner Prince made a motion to approve the check register from June 16, 2020- July 15, 2020. Commissioner Ronghi seconded the motion. Check register accepted as presented.

Agenda Item#2

A. **CFA Approval** for modifications to bathroom upgrades. The Request for change to the Contract for Financial Assistance is #12. Commissioner Prince made a motion to approve the modification to CFA #12. Commissioner Ronghi seconded the motion. All Commissioners were in favor.

B. **Presentation of Annual Plan.**

Maureen presented the Annual Plan to the Commissioners in a format that encouraged conversation and questions about any of the segments.

The Commissioners complimented the efforts of the staff of the AHA on the thoroughness of the Annual Plan.

A motion was presented by Commissioner Prince to accept the Annual Plan as presented. Commissioner Ronghi seconded the motion to accept the Annual Plan as presented. Four Commissioners voted to approve the Annual Plan 2021.

Executive Directors Report

1. Maureen informed the Commissioners of the construction that is currently progressing at the developments including the PVPC roofing project at Brady Village. There is a bathroom project, reasonable accommodation project for barrier free bathroom upgrades, pavement, and the barrier free bathroom project at Country View is in the final stages.
The question was asked when the tenants can use the Community Room. Maureen answered the reason to keep the community room closed is to maintain the health and wellness of the tenants because the AHA can not ensure the cleanliness of everyone who uses the room. Commissioner Ronghi added to the explanation the number of people able to congregate increased to 25 but the number was not the concern for the AHA. The maintenance of the health and wellness is the concern so the Community Room will remain closed until there is definitive guidance from the Governor.
2. There is not a timeline for the AHA to reopen to the public under the current recommendations. DHCD is thinking about how to dictate the LHA's across the State reopen when there is evidence that almost all aspects of the work are being done without opening to the public. AHA will wait to have guidance from the Governor in Phase four.
3. The AHA received a refund check from the unemployment insurance for a lower percentage of claims than was anticipated.
4. The Regional Attorney program is operational in Western Massachusetts. The firm the AHA is using is John Liebel from Springfield. Attorney Liebel has represented the AHA several times and been exceptional to work with.

Tenant Communications

Adjournment

A motion to adjourn was made by Commissioner Prince at 6:43pm. Commissioner Stickles seconded. All four Commissioners were in favor.

Respectfully Submitted,

Maureen M. Cayer
Executive Director

Recorded by,
Maureen M. Cayer

AGAWAM HOUSING AUTHORITY

Chapter 200, 667, and 705 Housing (combined)

Summary 2016 - 2017

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

- **Chapter 200 and 705 housing:** In the spring of 2016, surveys were sent to 9772 housing units. 3240 surveys were filled out and returned.
- **Chapter 667 housing:**
 - In the fall of 2016, surveys were sent to 9624 housing units and 5511 surveys were filled out and returned.
 - In the fall of 2017, surveys were sent to 6024 housing units and 3391 surveys were filled out and returned
- In the **Agawam Housing Authority**, surveys were sent to a total of **232** Chapter 667, 705, and 200 housing units; **140** surveys were completed.

This report provides some information about how the residents from the **Agawam Housing Authority** who answered the survey responded. It compares their answers to those from residents in the entire state and to those from medium LHAs in Western Massachusetts. These medium LHAs in Western Massachusetts include: Agawam, Greenfield, West Springfield, and Westfield.

Communication

Residents were asked about how they interacted with the Agawam Housing Authority in the last 12 months. The table below shows what percentage of residents said they did each of the following:

	Agawam Housing Authority	Medium LHAs in Western MA*	Entire State
Contacted management about a problem or concern.....	77%	80%	80%
Felt they were usually or always treated with courtesy and respect when they contacted management.....	77%	80%	84%
Saw the Capital Improvement Plan.....	17%	19%	28%
Saw the Operating Budget.....	7%	10%	16%
Knew the Executive Director held a meeting with residents...	40%	40%	45%

* Medium LHAs in Western Massachusetts include: Agawam, Greenfield, West Springfield, and Westfield.

Services and Programs

65% of the Agawam Housing Authority residents who responded to the survey said they would be interested in services and programs. Here are the services and programs residents said they would be most interested in participating in:

	Agawam Housing Authority	Medium LHAs in Western MA	Entire State
Job training programs.....	11%	17%	13%
Money management programs (<i>budgeting, taxes, income building</i>).....	17%	17%	15%
Children's programs (<i>tutoring, childcare, afterschool programs</i>).....	9%	17%	12%
Health and Medical Services (<i>visiting nurse, meal programs</i>).....	36%	35%	33%
Adult Education (<i>GED, ESL, educational counseling</i>)	7%	16%	15%

Maintenance and Repair

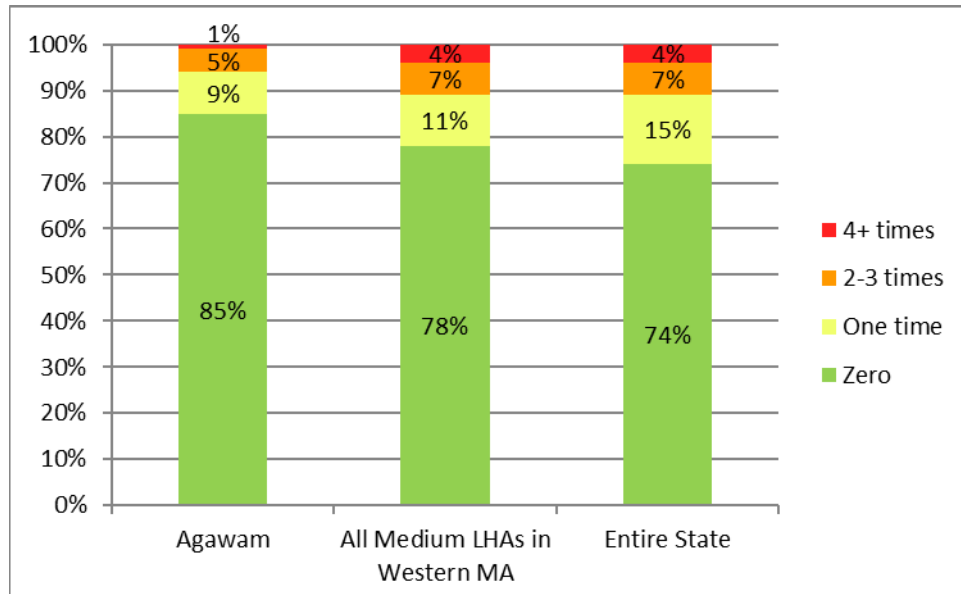
- **Who had problems?** Less than one-fifth of respondents had a problem with their heating and just under half had a plumbing problem in the last 12 months.

	Agawam Housing Authority	Medium LHAs in Western MA	Entire State
Had a heating problem.....	14%	22%	25%
Had a problem with water or plumbing.....	45%	42%	50%

- **Heating Problems**

How many times did residents have heating problems?

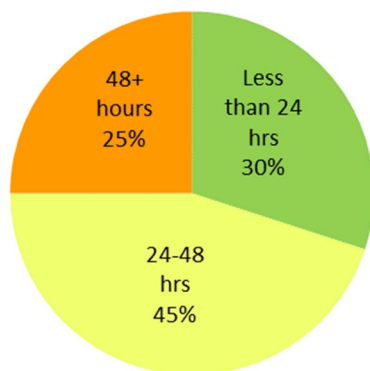
The charts below shows how many times respondents had heat problems in the last 12 months. The green part of the bars shows what percentage of residents did not have the problem at all. The yellow shows who had the problem one time. The orange shows those who had the problem 2-3 times. And the red shows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



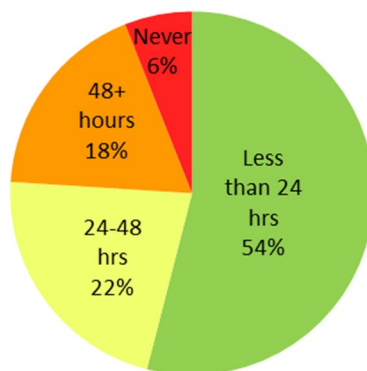
How long did it take to fix the heating problems?

For those respondents who had problems, we asked how long it usually took for the problems to be fixed – less than 24 hours, 24 - 48 hours, more than 48 hours, or never fixed.

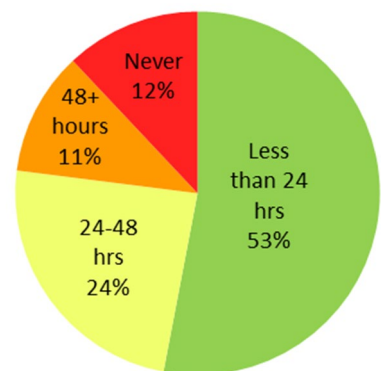
Agawam Housing Authority



Medium LHAs in Western MA



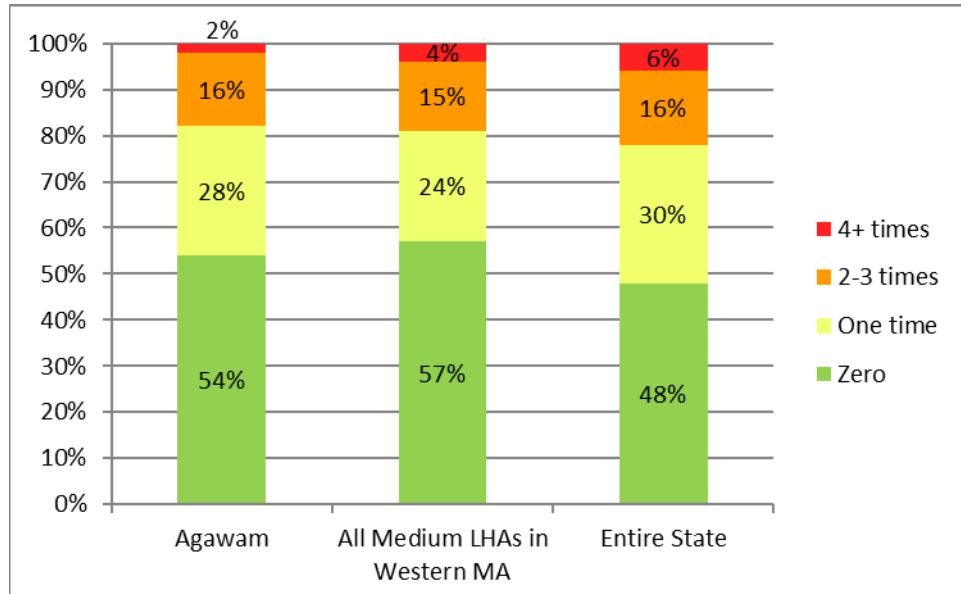
Entire State



- **Water or Plumbing Problems**

How many times did residents have problems with their water or plumbing?

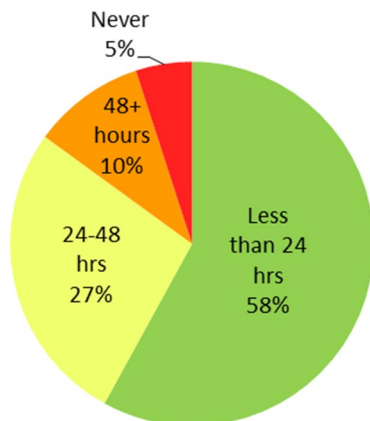
The charts below shows how many times respondents had water or plumbing problems in the last 12 months. The green part of the bars shows what percentage of residents did not have the problem at all. The yellow shows who had the problem one time. The orange shows those who had the problem 2-3 times. And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



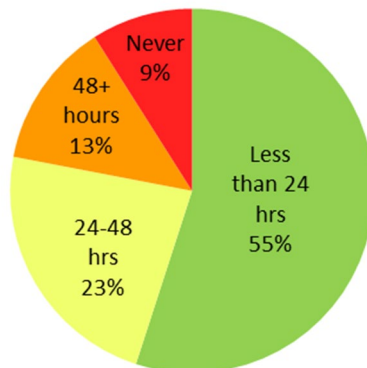
How long did it take to fix the water or plumbing problems?

For those respondents who had problems, we asked how long it usually took for the problems to be fixed – less than 24 hours, 24 - 48 hours, more than 48 hours, or never fixed.

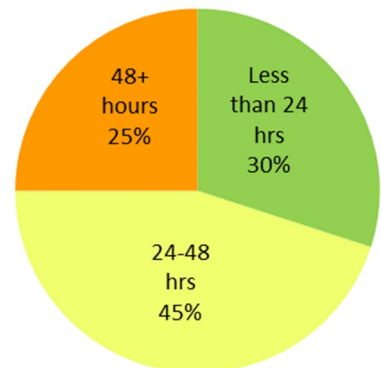
Agawam Housing Authority



Medium LHAs in Western MA

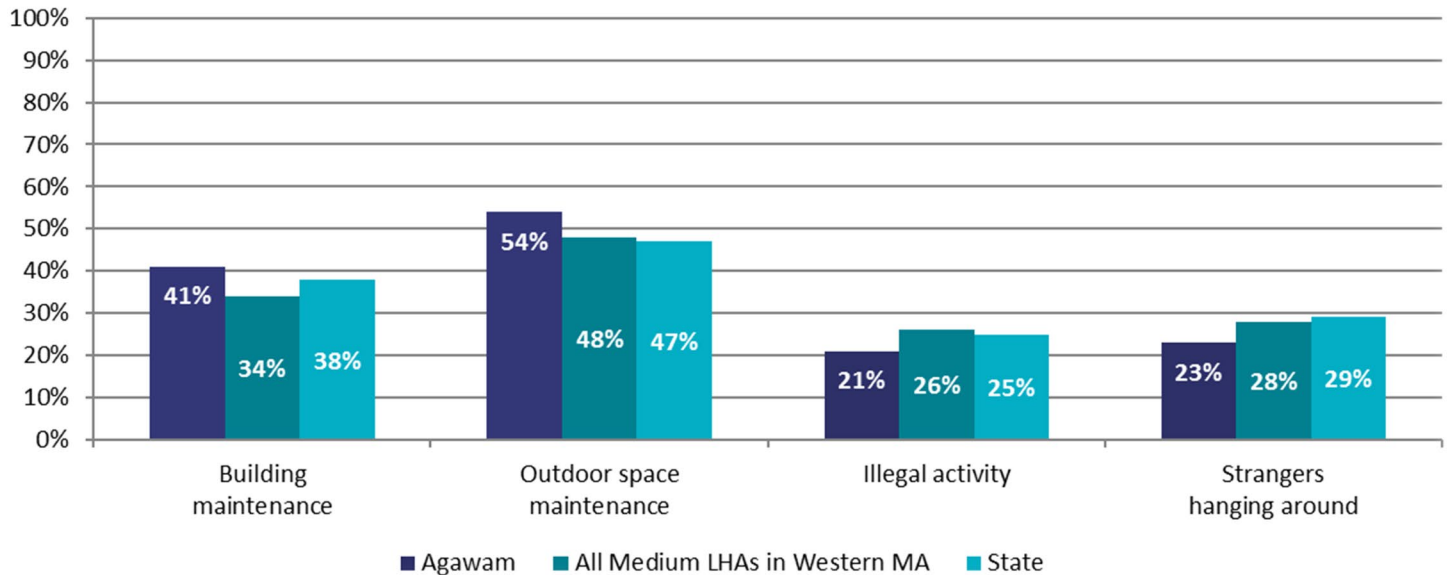


Entire State



- **What other problems did respondents have?** Respondents were asked how often they had problems with: building maintenance (*such as clean halls and stairways and having lights and elevators that work*), outdoor space maintenance (*such as litter removal and clear walk ways*), illegal activity in the development, and strangers hanging around who should not be there. The chart below shows what percentage of respondents said that they “always” or “sometimes” had this problem in the last 12 months.

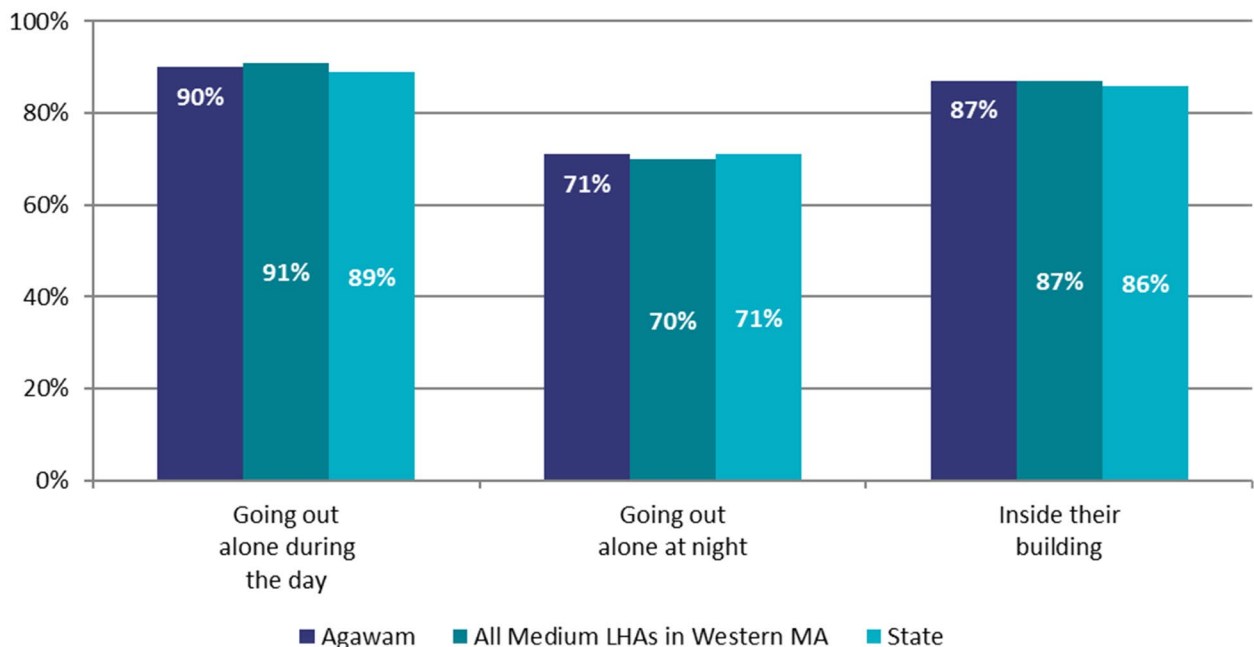
Respondents who “always” or “sometimes” had problems with...



Safety

Respondents were asked how safe they felt in their building and going outside alone. The chart below shows what percentage of people said they felt “very safe” or “mostly” safe.

Respondents who felt “very safe” or “mostly safe”



Agawam Housing Authority

Performance Management Review (PMR) Report

Fiscal Year End 9/30/2019

*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

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

Housing Authority	Agawam Housing Authority
Fiscal Year Ending	09/30/2019
Housing Management Specialist	Evelyn Muasya
Facilities Management Specialist	Bruce Budrick

Criteria	Score/Rating			
	Management			
Occupancy Rate	c.667	c.705	c.200	Cumulative
	No Findings	Operational Guidance	No Findings	No Findings
Tenant Accounts Receivable (TAR)	c.667	c.705	c.200	Cumulative
	Corrective Action	Corrective Action	Corrective Action	Corrective Action
Board Member Training	Corrective Action			
Certifications and Reporting Submissions	Operational Guidance			
	Financial			
Adjusted Net Income	No Findings			
Operating Reserves	No Findings			

LHA Agawam Housing Authority

Occupancy

Rating All: No Findings
Rating 667: No Findings
Rating 200: No Findings
Rating 705: Operational Guidance

- ☐ 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: Operational Guidance rating for the 705 program. Waivers should be requested as soon as possible for qualified vacant units. See Public Housing Notice 2013-07 for additional guidance, review Attachment A.**

Tenant Accounts Receivable (TAR)

Rating All: Corrective Action
Rating 667: Corrective Action
Rating 200: Corrective Action
Rating 705: Corrective Action

- ☐ Create or update rent collection policy and procedures and submit to DHCD for review, with supporting Board vote.
- ☐ Adhere to your rent collection policy and lease, i.e. sending notices, reminder letters, 14 day notice to quit, 30 day notice etc. Send notices to tenants early and frequently.
- ☐ Increase ways to accept rent payment, i.e. check scanners, lock boxes, electronic debit, autopay, etc.
- ☐ Consider using small claims court (<https://www.mass.gov/info-details/massachusetts-law-about-small-claims>)
- ☐ Create written repayment agreements, either in house or court ordered, and ensure they are adhered to.
- ☐ Evaluate vacated balances to better understand what is collectible and what is unlikely to be collected. Don't allow tenant balances to build-up before doing lease enforcement. Review aged receivables report regularly.
- ☐ Set reasonable thresholds for commencing legal action.
- ☐ Ensure proper documentation of past due balances and collection efforts with tenants.
- ☒ **Other: Unable to make recommendations for this category because TAR data was not submitted by due dates, an evaluation could not be performed. Review PHN 2018-08 and PHN 2017-13.**

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:**

Adjusted Net Income/Revenue

Rating: No Findings

Revenue:

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

Expense:*Salaries*

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

Legal

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

Utilities

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

Maintenance

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

- ☐ **Other:**

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:**

PMR Capital Benchmarks for LHA Fiscal Year 2019

DEPARTMENT OF HOUSING AND COMMUNITY DEVELOPMENT (DHCD) PMR Fiscal Year 2019	
For a detailed report of the Performance Management Review (PMR), please contact the Local Housing Authority	
Criteria	Score/Rating
	Capital
Capital Improvement Plan (CIP) Submitted	Operational Guidance
Capital Spending	No Findings

DEPARTMENT OF HOUSING AND COMMUNITY DEVELOPMENT (DHCD) PMR Physical Condition Ratings	
Housing Authority	Agawam Housing Authority
Fiscal Year Ending	9/30/2019
Housing Management Specialist	Evelyn Muasya
Facilities Management Specialist	Bruce Budrick

Inspection and Work Order System Criteria	Rating
Inspections	
LHA conducted 100% of the unit inspections.	Corrective Action
Inspections report noted 100% of the necessary repairs in each unit.	Corrective Action
100% of inspection-related work orders were generated.	Corrective Action
Work order system identifies, tracks, and can produce reports for inspection work orders.	No Findings
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).	No Findings
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.	Corrective Action
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.	No Findings
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	Agawam Housing Authority
Fiscal Year Ending	9/30/2019
Housing Management Specialist	Evelyn Muasya
Facilities Management Specialist	Bruce Budrick

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 - Corrective Action

- ☐ 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:

AHA completed most of their Annual Inspections during the fiscal year but a couple of the randomly selected were not completed during the fiscal year. AHA should provide alternate units if selected units were vacant according to 24 hour notice.

Criteria B: Inspection report noted 100% of the necessary repairs in each unit - Corrective Action

- ☐ 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:

One of the selected units was not inspected during the fiscal year. AHA should notify DHCD if any of the selected units were vacant and not inspected according to 24 hour notice.

Criteria C: 100% of inspection-related work orders were generated - Corrective Action

- ☐ 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:

AHA completed most of their Annual Inspections during the fiscal year but a couple of the randomly selected were not completed during the fiscal year. AHA should provide alternate units if selected units were vacant according to 24 hour notice.

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

Criteria D: Inspection - No Findings

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 - No Findings

Criteria G: Emergency - No Findings

Criteria I: Vacancy - No Findings

Criteria M: Requested - No Findings

- ☐ 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 - Corrective Action

- ☐ 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:

AHA has a Preventive Maintenance List but has not yet scheduled all the items on the list in their work order system and has not created work orders for all preventive maintenance. AHA should customize their PM schedule and create recurring work orders for the required preventive maintenance in their plan.

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: