

## Notice of Public Hearing

### The Fairhaven Housing Authority invites all tenants and the general public to a review of the Authority's Proposed Annual Plan for Fiscal Year 2021

The Annual Plan is intended to provide insight into the Authority's operations and plans for the coming fiscal year as they affect the Authority's state-aided public housing. The Proposed Annual Plan is comprised of the following elements:

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

Hearing time and date: **1:00 PM on 09/17/2020**

Hearing location: Oxford Terrace Comm Room, 275 Main St. Fhvn MA  
remote access

<https://global.gotomeeting.com/join/437983581rhaven> -see below-

Residents and the general public are invited to review the Annual Plan before the hearing and may submit public comments as noted below. The Authority shall consider the concerns of any Local Tenants' Organization (LTO) or Resident Advisory Board (RAB) regarding needs and priorities and incorporate some or all of such needs and priorities in the draft plan if deemed by the Authority to be consistent with sound management. Substantive comments will be summarized and included in the Annual Plan when it is submitted to the Department of Housing and Community Development (DHCD).

- o Copies of the Annual Plan are available at the Authority's office or may be reviewed online at <https://tinyurl.com/LHA-MA-AnnualPlan>
- o Comments may be submitted orally at the hearing, by emailing the housing authority office, or by submitting written comments at the housing authority office. Comments must be received no later than the close of the public hearing.
- o For reasonable accommodation requests contact the housing authority office by 09/09/2020 at 03:00 PM.
- o Contact information for Fairhaven Housing Authority:  
Office: 275 Main Street, Fairhaven, MA 02719  
Phone: (508) 993-1144  
Email: [fhvnhousing@comcast.net](mailto:fhvnhousing@comcast.net)

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United States (Toll Free): 1 877 568 4106

Access Code: 437-983-581

E-mail your request to [fhvnhousing@comcast.net](mailto:fhvnhousing@comcast.net)

or Call the office at 508-993-1144 or mail to Fairhaven Housing Authority Office , 275 Main St.  
Fairhaven, MA 02719

## Aviso de audiencia pública

### El/La Fairhaven Housing Authority invita a todos los arrendatarios y al público en general a una revisión del Plan Anual Propuesto por la autoridad para el año fiscal 2021

El Plan anual tiene como objetivo dar a conocer las operaciones de la autoridad y sus planes para el año fiscal entrante en lo que respecta a sus iniciativas de vivienda pública con financiamiento estatal. El Plan anual propuesto comprende los siguientes elementos:

1. Plan de mejoras de capital propuesto (5 años)
2. Plan de mantenimiento y reparaciones propuesto
3. Presupuesto operativo actual
4. Respuestas a los hallazgos en la Revisión de gestión del desempeño (PMR)
5. Listado de las políticas de la autoridad de vivienda
6. Listado de las exenciones a las normas vigentes del Departamento de Vivienda y Desarrollo Comunitario (DHCD)
7. Otros elementos

Fecha y hora de la audiencia: **1:00 PM** del **09/17/2020**

Lugar de la audiencia: Oxford Terrace Comm Room, 275 Main St. Fhvn MA  
remote access

<https://global.gotomeeting.com/join/437983581rhaven> -see below-

Invitamos a los residentes y al público en general a leer el Plan anual antes de la audiencia y a hacer comentarios públicos por los medios que se indican más abajo. La autoridad tomará en consideración las inquietudes de cualquier organización de arrendatarios locales (LTO) o junta asesora de residentes (RAB) en relación con las necesidades y prioridades. Si las considera consistentes con los principios de buena gestión, la autoridad incorporará dichas necesidades y prioridades -en parte o en su totalidad- en la versión preliminar del plan. Los comentarios sustantivos se resumirán e incluirán en el Plan anual cuando este se envíe al Departamento de Vivienda y Desarrollo Comunitario (DHCD).

- o Puede obtener copias del Plan anual en la oficina de la autoridad o consultar el Plan por Internet en <https://tinyurl.com/LHA-MA-AnnualPlan>. El Plan está disponible únicamente en inglés.
- o Si desea hacer comentarios, puede hacerlo oralmente en la audiencia o enviar los comentarios por correo electrónico o postal a la oficina de la autoridad de vivienda. Los comentarios se deben recibir antes del cierre de la audiencia pública.
- o Si tiene una solicitud razonable en relación con una discapacidad, póngase en contacto con la oficina de la autoridad de vivienda antes del 09/09/2020 a las 03:00 PM.
- o Información de contacto de Fairhaven Housing Authority:  
Oficina: 275 Main Street, Fairhaven, MA 02719  
Teléfono: (508) 993-1144  
Correo electrónico: [fhvnhousing@comcast.net](mailto:fhvnhousing@comcast.net)

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or Call the office at 508-993-1144 or mail to Fairhaven Housing Authority Office , 275 Main St. Fairhaven,  
MA 02719

សេចក្តីជូនដំណឹងអំពីសវនកម្មសាធារណៈ

Fairhaven Housing Authority អញ្ជើញអ្នកជួល  
និងសាធារណជនទូទៅទាំងអស់ឲ្យមើលឡើងវិញនូវផែនការ  
ប្រចាំឆ្នាំដែលបានដាក់ស្នើរបស់អាជ្ញាធរសម្រាប់ឆ្នាំសារពើពន្ធ  
2021

ផែនការប្រចាំឆ្នាំមានគោលបំណងផ្តល់ការយល់ដឹងអំពីបុរេកម្មភាព និងផែនការរបស់អាជ្ញាធរ  
សម្រាប់ឆ្នាំសារពើពន្ធខាងមុខនេះ ព្រោះរ៉ាប់រងរាល់ដល់នៃឱ្យមានសាធារណៈដែលជួយដោយ  
របៀបរបស់អាជ្ញាធរ។ ផែនការប្រចាំឆ្នាំដែលបានដាក់ស្នើ មានជាតុដូចខាងក្រោម៖

1. ផែនការកែលម្អអនុបត្ថម្ភដែលបានដាក់ស្នើ (5 ឆ្នាំ)
2. ផែនការជួសជុល និងថែទាំដែលបានដាក់ស្នើ
3. ថវិកាបុរេកម្មភាពបច្ចុប្បន្ន
4. ការផ្តល់យោបល់ពីលទ្ធផលនៃការពិនិត្យមើលឡើងវិញនូវការគ្រប់គ្រងការបំពេញការងារ (PMR)
5. បញ្ជីគោលនយោបាយអាជ្ញាធរលំនៅដ្ឋាន
6. បញ្ជីការលះបង់សិទ្ធិពីបទប្បញ្ញត្តិគ្រប់គ្រងរបស់ក្រសួងអភិវឌ្ឍន៍សហគមន៍ និងលំនៅដ្ឋាន (DHCD)
7. ធាតុផ្សេងទៀត

កាលបរិច្ឆេទ និងម៉ោងសវនកម្ម៖

1:00 PM នៅ 09/17/2020

ទីកន្លែងសវនកម្ម៖

Oxford Terrace Comm Room, 275 Main St. Fhvn MA

remote access

<https://global.gotomeeting.com/join/437983581rhaven> -see below-

គេហទំព័រ

និងសាធារណជនទូទៅគួរមានអញ្ជើញឱ្យពិនិត្យមើលឡើងវិញនូវផែនការប្រចាំឆ្នាំមុនពេលបើកសវនាការ  
ហើយអាចបញ្ចូលមតិសាធារណៈដូចមានកត់សម្គាល់ខាងក្រោម។

អាជ្ញាធរគួរតែគ្រប់គ្រងរាល់ឆ្នាំរបស់អង្គការរបស់អ្នកជួលក្នុងមូលដ្ឋាន (LTO) ឬក្រុមប្រឹក្សាសាលាបាលីគេហទំព័រ  
(RAB) អំពីតម្រូវការ និងអាទិភាពនានា ហើយបញ្ចូលតម្រូវការ និងអាទិភាពទាំងនោះមួយចំនួន  
ឬទាំងអស់ទៅក្នុងសេចក្តីព្យាងផែនការ បើអាជ្ញាធរយល់ថាសមស្របជាមួយការគ្រប់គ្រងដែលត្រូវគ្រប់គ្រង។ មតិសំខាន់  
ៗនឹងគួរមានសង្ខេប និងបញ្ចូលទៅក្នុងផែនការប្រចាំឆ្នាំ នៅពេលគួរមានដាក់ជូនក្រសួងអភិវឌ្ឍន៍សហគមន៍  
និងលំនៅដ្ឋាន (DHCD)។

- o សេចក្តីជូនដំណឹងនៃផែនការប្រចាំឆ្នាំ មាននៅការិយាល័យរបស់អាជ្ញាធរ  
ឬអាចពិនិត្យមើលឡើងវិញលើបណ្តាញតាមរយៈ <https://tinyurl.com/LHA-MA-AnnualPlan>។  
មានជាភាសាអង់គ្លេសស្របច្បាប់។
- o មតិសាធារណៈគួរមានផ្តល់ដោយផ្ទាល់មាត់នៅក្នុងសវនាការ  
ដោយផ្ទាល់មាត់នៃការិយាល័យអាជ្ញាធរលំនៅដ្ឋាន  
ឬដោយដាក់មតិជាលាយលក្ខណ៍អក្សរនៅការិយាល័យអាជ្ញាធរលំនៅដ្ឋាន។  
មតិសាធារណៈត្រូវតែផ្តល់ឱ្យមានមុនពេលបិទសវនាការសាធារណៈ។
- o សម្រាប់សំណើសុំការសុំនាក់សំណើសមរម្យ សូមទាក់ទងការិយាល័យអាជ្ញាធរលំនៅដ្ឋានក្រុមប្រឹក្សា 09/09/2020  
នៅម៉ោង 03:00 PM។
- o ព័ត៌មានទំនាក់ទំនងសម្រាប់ Fairhaven Housing Authority៖  
ការិយាល័យ៖ 275 Main Street, Fairhaven, MA 02719  
ទូរស័ព្ទ៖ (508) 993-1144  
អ៊ីមែល៖ [fhvnhousing@comcast.net](mailto:fhvnhousing@comcast.net)

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Fairhaven, MA 02719

## Thông báo Điều trần Công khai

### Fairhaven Housing Authority

## xin mời tất cả những người thuê nhà và cộng đồng đến tham dự buổi đánh giá Kế hoạch Hàng năm Đề xuất cho Năm Tài chính của Cơ quan Quản lý 2021

Kế hoạch Hàng năm này nhằm đem lại cái nhìn sâu sắc đối với các hoạt động của Cơ quan Quản lý và các kế hoạch cho năm tài chính sắp tới vì chúng ảnh hưởng đến vấn đề gia cư công cộng có sự trợ giúp của tiểu bang của Cơ quan Quản lý. Kế hoạch Hàng năm Đề xuất bao gồm các thành phần sau:

1. Kế hoạch Cải tạo Cơ bản Đề xuất (5 năm)
2. Kế hoạch Bảo trì và Sửa chữa Đề xuất
3. Ngân sách Vận hành Hiện tại
4. Trả lời đối với những phát hiện trong bản Đánh giá Quản lý Hoạt động (PMR)
5. Danh sách các chính sách của cơ quan quản lý gia cư
6. Danh sách các quyết định miễn tuân thủ các quy định chi phối của Sở Gia cư và Phát triển Cộng đồng (DHCD)
7. Các thành phần khác

Ngày và giờ điều trần: **1:00 PM và 09/17/2020**

Địa điểm điều trần: Oxford Terrace Comm Room, 275 Main St. Fhvn MA  
remote access

<https://global.gotomeeting.com/join/437983581rhaven> -see below-

Các cư dân và cộng đồng được mời tham gia xem xét Kế hoạch Hàng năm trước phiên điều trần và có thể gửi ý kiến đóng góp của công chúng như được mô tả dưới đây. Cơ quan Quản lý phải cân nhắc các quan ngại của bất kỳ Tổ chức của Người Thuê nhà Địa phương (LTO) hay Hội đồng Cố vấn Cư dân (RAB) nào về các nhu cầu và ưu tiên và kết hợp một số hoặc tất cả các nhu cầu và ưu tiên đó trong bản thảo kế hoạch nếu Cơ quan Quản lý coi là phù hợp với việc quản lý hợp lý. Các ý kiến đóng góp có cơ sở sẽ được tóm tắt và đưa vào nội dung Kế hoạch Hàng năm khi nộp cho Sở Gia cư và Phát triển Cộng đồng (DHCD).

- o Các bản sao của Kế hoạch Hàng năm sẵn có tại văn phòng Cơ quan Quản lý hoặc quý vị có thể xem trực tuyến tại <https://tinyurl.com/LHA-MA-AnnualPlan>. Các bản này chỉ có bằng Tiếng Anh.
- o Các ý kiến đóng góp có thể được nộp bằng lời tại buổi điều trần, gửi email cho văn phòng cơ quan quản lý gia cư, hoặc nộp ý kiến bằng văn bản tại văn phòng cơ quan quản lý gia cư. Các ý kiến đóng góp phải được nhận không muộn hơn giờ kết thúc phiên điều trần.
- o Để đưa ra các yêu cầu về biện pháp điều chỉnh đặc biệt hợp lý, hãy liên hệ với văn phòng cơ quan quản lý gia cư trước 09/09/2020 lúc 03:00 PM.
- o Thông tin liên hệ cho Fairhaven Housing Authority:  
Văn phòng: 275 Main Street, Fairhaven, MA 02719  
Điện thoại: (508) 993-1144  
Email: [fhvnhousing@comcast.net](mailto:fhvnhousing@comcast.net)

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Fairhaven, MA 02719

# 开公众听证会的通知

## Fairhaven Housing Authority 邀请所有租户和公众 对本管理局的 2021 财政年度建议的《年度计划》进行审查

该《年度计划》旨在深入了解本管理局的运作和下一财政年度的计划，因为它们会影响到本管理局的由马萨诸塞州资助和管理的公共住房。建议的年度计划包括以下内容：

1. 建议的资本改善计划（5年）
2. 建议的维修计划
3. 当前的运营预算
4. 对绩效管理审查（PMR）调查结果的回应
5. 住房管理局政策一览表
6. 从住房和社区发展部（DHCD）的法规可豁免的条例清单
7. 其他基本点

听证会时间和日期: **1:00 PM 在 09/17/2020**

听证会地点: Oxford Terrace Comm Room, 275 Main St. Fhvn MA

remote access

<https://global.gotomeeting.com/join/437983581rhaven> -see below-

请租户和公众在听证会之前审阅《年度计划》，并可以按照以下说明提交公众意见。本管理局将考虑任何地方租户组织（LTO）或居民咨询委员会（RAB）对需求和需优先考虑的事项的关注，并在管理局认为是与明智、稳妥的管理相一致的情况下，将部分或全部此类需求和需优先考虑的事项纳入计划草案。公众的实质性意见会被汇总并纳入《年度计划》，然后被提交给住房和社区发展部（DHCD）。

- 可以在管理局的办公室获得《年度计划》的副本，或者可以上网进入 <https://tinyurl.com/LHA-MA-AnnualPlan> 在线查看。那些副本或网上内容是用英语的。
- 各位要提出评论，可以在听证会上通过口头方式、或通过向住房管理局的办公室发送电子邮件、或在住房管理局的办公室当面提交书面评论。所有评论必须在公众听证会结束之前收到。
- 对于合理的需通融的要求，请在 09/09/2020 之前通过 03:00 PM 与住房管理局的办公室联系。
- Fairhaven Housing Authority 的联系方式：  
办公室： 275 Main Street, Fairhaven, MA 02719  
电话： (508) 993-1144  
电子邮件： [fhvnhousing@comcast.net](mailto:fhvnhousing@comcast.net)

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Fairhaven, MA 02719

## Aviso de Audiência Pública

### O Fairhaven Housing Authority convida todos os locatários e o público em geral para uma revisão do plano anual proposto pela Autoridade para o ano fiscal 2021

O Plano Anual é destinado a fornecer insights sobre as operações e planos da Autoridade para o próximo ano fiscal, uma vez que afetam as habitações públicas da Autoridade estadual. O plano anual proposto é composto pelos seguintes elementos:

1. Plano de melhoria de capital proposto (5 anos)
2. Plano de manutenção e reparação proposto
3. Orçamento operacional atual
4. Respostas aos achados da Revisão de Gerenciamento de Desempenho (PMR)
5. Lista de políticas da autoridade habitacional
6. Lista de isenções de regulamentos aplicáveis do Departamento de Habitação e Desenvolvimento Comunitário (DHCD)
7. Outros elementos

Data e hora da audiência: **1:00 PM em 09/17/2020**

Local da audiência: Oxford Terrace Comm Room, 275 Main St. Fhvn MA

remote access

<https://global.gotomeeting.com/join/437983581rhaven> -see below-

Os residentes e o público em geral são convidados a revisar o Plano Anual antes da audiência e podem enviar comentários públicos, conforme indicado abaixo. A Autoridade deve considerar as preocupações de qualquer Organização de Locatários Locais (LTO) ou Conselho Consultivo de Residentes (RAB) em relação às necessidades e prioridades e incorporar algumas ou todas essas necessidades e prioridades ao projeto do plano se a Autoridade considerar que é consistente com a boa gestão. Os comentários substanciais serão resumidos e incluídos no Plano Anual quando este for submetido ao Departamento de Habitação e Desenvolvimento Comunitário (DHCD).

- Cópias do Plano Anual estão disponíveis no escritório da Autoridade ou podem ser analisadas on-line em <https://tinyurl.com/LHA-MA-AnnualPlan>. Estas estão apenas no idioma inglês.
- Os comentários podem ser apresentados oralmente na audiência, por e-mail para o escritório da autoridade habitacional ou por escrito para o escritório da autoridade habitacional. Os comentários devem ser recebidos, no máximo, até o encerramento da audiência pública.
- Para solicitações razoáveis de acomodação, entre em contato com o escritório da autoridade habitacional em 09/09/2020 às 03:00 PM.
- Informações de contato para Fairhaven Housing Authority:  
Escritório: 275 Main Street, Fairhaven, MA 02719  
Telefone: (508) 993-1144  
E-mail: [fhvnhousing@comcast.net](mailto:fhvnhousing@comcast.net)

**Detailed Instructions for Remote Access**

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You can also dial in using your phone.

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## Уведомление о публичном слушании

### Fairhaven Housing Authority приглашает всех жильцов и представителей общественности принять участие в рассмотрении предлагаемого Жилищным управлением Годового плана на фискальный год 2021

Целью Годового плана является представление сведений о деятельности и планах Жилищного управления на предстоящий фискальный год в том, что касается предоставления социального жилья Жилищным управлением при поддержке штата Массачусетс. Предлагаемый Годовой план включает следующие разделы:

1. Предлагаемый план капитального ремонта (5-летний);
2. Предлагаемый план технического обслуживания и ремонта;
3. Текущий операционный бюджет;
4. Ответы по результатам оценки организации хозяйственной деятельности (PMR);
5. Список политик Жилищного управления;
6. Список отказов от постановлений Департамента жилищного хозяйства и общественного развития (DHCD);
7. Другие разделы.

Время слушания: **1:00 PM** Дата слушания **09/17/2020**

Место проведения слушания: Oxford Terrace Comm Room, 275 Main St. Fhvn MA  
remote access

<https://global.gotomeeting.com/join/437983581rhaven> -see below-

Жильцы и представители общественности приглашаются принять участие в рассмотрении Годового плана перед началом слушания и могут делать открытые замечания, как указано ниже. Жилищное управление рассмотрит замечания Местной жилищной организации (LTO) или Жилищного консультационного совета (RAB), касающиеся потребностей и приоритетов жильцов, и включит все такие приоритеты и потребности или их часть в проект плана, если Жилищное управление посчитает, что они соответствуют принципам рационального управления. Содержательные замечания будут резюмированы и включены в Годовой план при его подаче в Департамент жилищного хозяйства и общественного развития (DHCD).

- о Копии Годового плана можно получить в офисе Жилищного управления или на сайте: <https://tinyurl.com/LHA-MA-AnnualPlan>. Документы доступны только на английском языке.
- о Замечания можно сделать устно в ходе слушания, а также отправить их по электронной почте в офис Жилищного управления или оставив их в письменном виде в офисе Жилищного управления. Замечания должны быть получены до закрытия публичного слушания.
- о Разумные запросы о размещении можно направить в офис Жилищного управления до 09/09/2020 03:00 PM.
- о Контактная информация Fairhaven Housing Authority:
  - Офис: 275 Main Street, Fairhaven, MA 02719
  - Телефон: (508) 993-1144
  - Адрес эл. почты: [fhvnhousing@comcast.net](mailto:fhvnhousing@comcast.net)

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Fairhaven, MA 02719

## Avi Odisyon Piblik

### The Fairhaven Housing Authority

## ap envite tout lokatè ak piblik la an jeneral nan yon revizyon Plan Anyèl pou Ane Fiskal la ke Administrasyon an Pwopoze 2021

Plan Anyèl la fèt nan entansyon pou bay apèsi sou operasyon Otorite a ak plan pou ane fiskal k ap vini a nan fason k ap afekte lojman piblik Administrasyon ke eta a finanse. Plan Anyèl yo pwopoze a te gen eleman sa yo ladann:

1. Plan Amelyorasyon Kapital yo Pwopoze (5-an)
2. Plan Antretyen ak Reparasyon yo Pwopoze
3. Bidjè Operasyon Aktyèl
4. Rezilta Revizyon Repons Jesyon Pèfòmans lan (Performance Management Review, PMR)
5. Lis règleman administrasyon lojman yo
6. Lis egzonasyon règlemantasyon k ap fè otorite nan Depatman Lojman ak Devlopman Kominotè a (Department of Housing and Community Development, DHCD)
7. Lòt eleman yo

Dat ak lè odision: **1:00 PM** nan dat **09/17/2020**

Adrès odision an: Oxford Terrace Comm Room, 275 Main St. Fhvn MA  
remote access

<https://global.gotomeeting.com/join/437983581rhaven> -see below-

N ap envite rezidan yo ak piblik la an jeneral pou vin fè revizyon Plan Anyèl la avan odision an epi yo gendwa soumèt kòmantè piblik jan sa note annapre a. Administrasyon an pral konsidere enkyetid nenpòt Òganizasyon Lokatè Lokal (LTO) oswa Komite Konsiltatif Rezidan (Resident Advisory Board, RAB) anrapò ak bezwen preyorite epi enkòpore kèlke nan yo oswa tout nan bezwen sa yo ak priyorite yo nan dokiman plan an si Administrasyon an jije ke sa nesèsè pou on bon jesyon. Y ap fè rezime kòmantè enpòtan yo epi mete yo nan Plan Anyèl la lè yo te soumèt li bay Depatman Lojman ak Devlopman Kominotè (Department of Housing and Community Development, DHCD).

- Kopi Plan Anyèl yo disponib nan biwo Administrasyon an oswa w ka revize anliy nan <https://tinyurl.com/LHA-MA-AnnualPlan>. Sa yo se nan lang Anglè sèlman.
- Yo gendwa soumèt kòmantè yo vèbalman nan odision an, pa imèl bay biwo administrasyon lojman an, oswa nan soumisyon kòmantè ekri w yo nan biwo administrasyon lojman an. Yo ta dwe voye kòmantè yo nan yon moman ki pa pi ta pase odision piblik la.
- Pou demand akomodasyon rezonab kontakte biwo administrasyon lojman an kote w ap 09/09/2020 a 03:00 PM.
- Enfòmasyon kontak pou Fairhaven Housing Authority:  
Biwo: 275 Main Street, Fairhaven, MA 02719  
Telefòn: (508) 993-1144  
Imèl: [fhvnhousing@comcast.net](mailto:fhvnhousing@comcast.net)

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## Fairhaven Housing Authority Proposed 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 Fairhaven 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. Cover sheet for tenant satisfaction surveys
  - b. Tenant Satisfaction Survey - COMBO
  - c. Performance Management Review.
  - d. PMR Responses

**State-Aided Public Housing Developments**

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

Dev No	Type	Development Name	Num Bldgs	Year Built	Dwelling Units
667-05	Elderly	ANTHONY HAVEN 667-05	1	1989	24
667-04	Elderly	DANA COURT 667-04	1	1982	55
667-01	Elderly	GREEN MEADOWS 667-01	9	1966	41
667-02	Elderly	GREEN MEADOWS II 667-02	2	1971	52
667-03	Elderly	OXFORD TERRACE 667-03	5	1976	108
	Family	Family units in smaller developments	3		6
Total			21		286

**LHA Central Office**

Fairhaven Housing Authority  
275 Main Street, Fairhaven, MA, 02719  
Krisanne Sheedy, Executive Director  
Phone: 508-993-1144  
Email: fhvnhousing@comcast.net

**LHA Board of Commissioners**

	<u>Role</u>	<u>Category</u>	<u>From</u>	<u>To</u>
Carol Alphonso		Tenant	06/22/2020	03/31/2023
John Farrell	Member		04/01/2018	03/31/2023
Jean Rousseau	Vice-Chair	State Appointee	05/01/2019	04/30/2024
Anne Silveira	Treasurer		05/01/2019	04/30/2024
Jay Simmons	Chair		05/01/2017	04/30/2022

Plan History

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

REQUIREMENT		DATE COMPLETED
A.	Advertise the public hearing on the LHA website.	07/24/2020
B.	Advertise the public hearing in public postings.	07/24/2020
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.	07/24/2020
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.	
G.	Executive Director presents the Annual Plan to the Board.	
H.	Board votes to approve the AP.	

This Annual Plan (AP) will be reviewed by the Department of Housing and Community Development (DHCD) following the public comment period, the public hearing, and LHA Board approval.

**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)	\$1,601,657.56		Total of all FF awards minus prior FF spending
LHA Emergency Reserve	\$240,248.63		Amount to reserve for emergencies
Net FF Funds (First 3 Years of the CIP)	\$1,361,408.93	\$1,402,572.60	Funds to plan & amount actually planned in the first 3 years of the CIP
ADA Set-aside	\$8,817.33	\$8,000.00	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)	\$1,352,591.60	\$1,394,572.60	Funds awarded by DHCD to be used on projects selected by the LHA and approved by DHCD.
Special DHCD Funding	\$4,971,524.00	\$4,971,524.00	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	\$6,332,932.93	\$6,374,096.60	Total of all anticipated funding available for planned projects and the total of planned spending.

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

**Capital Improvement Plan (CIP)****Regional Capital Assistance Team**

Fairhaven 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
094030	2008 FF Master CFA	GREEN MEADOWS 667-01	\$4,588	\$4,588	\$0	\$0	\$0	\$0	\$0	\$0
094051	FF: Roof-top exhaust fan to assist/add 4 kitchen exhaust fans 667-3	GREEN MEADOWS 667-01	\$145,003	\$143,483	\$0	\$1,520	\$0	\$0	\$0	\$0
094052	FF: Repave Parking Lot - Dana Court	DANA COURT 667-04	\$359,564	\$286,683	\$0	\$72,881	\$0	\$0	\$0	\$0
094054	FF: Replace Boilers & Hot Water Heater Tanks - Rev	DANA COURT 667-04	\$214,975	\$124,175	\$0	\$800	\$0	\$0	\$0	\$0
094057	FF: ADA Automatic Door Openers at So and No Entrance and Community Room	OXFORD TERRACE 667-03	\$84,358	\$43,658	\$0	\$700	\$0	\$0	\$0	\$0
094059	FF: Replace Hot Water Boiler & Circulator Oxford Terrace- Rev	OXFORD TERRACE 667-03	\$201,450	\$145,515	\$0	\$650	\$0	\$0	\$0	\$0
094062	FY18 Sustainability - Energy - Trees	OXFORD TERRACE 667-03	\$5,000	\$0	\$0	\$5,000	\$0	\$0	\$0	\$0
094063	FF: Repair Concrete Stairs and Brick	ANTHONY HAVEN 667-05	\$168,872	\$155,462	\$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
094064	FF: 3 Stall Garage/Bay New Construction	OXFORD TERRACE 667-03	\$672,000	\$51,779	\$537	\$58,888	\$561,335	\$0	\$0	\$0
094065	FF: Replace Windows 667-02	GREEN MEADOWS 667-01	\$152,288	\$102,142	\$0	\$10,146	\$0	\$0	\$0	\$0
094066	FF: Roof Top Exhaust Fan Replacement	GREEN MEADOWS 667-01	\$143,000	\$126,560	\$0	\$16,440	\$0	\$0	\$0	\$0
094068	FF: Common Area Carpet Replacement 667-5	ANTHONY HAVEN 667-05	\$20,000	\$0	\$0	\$20,000	\$0	\$0	\$0	\$0
094069	ModPHASE 2020 Phase 1: Units upgrades,Emergency Generator, Fire Safety Upgrade	OXFORD TERRACE 667-03	\$4,932,524	\$0	\$0	\$259,729	\$2,894,848	\$1,777,949	\$0	\$0
094070	H&S FY20: Fire Alarm Repair		\$15,000	\$0	\$0	\$15,000	\$0	\$0	\$0	\$0
094071	H&S FY20: replace bath fans/tub cut		\$9,500	\$0	\$0	\$9,500	\$0	\$0	\$0	\$0
094072	H&S FY20: Metal Ramp to Courtyard		\$2,000	\$0	\$0	\$2,000	\$0	\$0	\$0	\$0
094073	H&S FY20: Trim or Remove Tree		\$5,000	\$0	\$0	\$5,000	\$0	\$0	\$0	\$0
094074	H&S FY20: Stair Treads		\$2,500	\$0	\$0	\$2,500	\$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
•	Exterior Door Replacement - Green Meadows	GREEN MEADOWS 667-01	\$363,688	\$0	\$0	\$0	\$0	\$46,485	\$317,204	\$0
•	Roof Replacement - (Green Meadow) 667-01	GREEN MEADOWS 667-01	\$360,296	\$0	\$0	\$0	\$0	\$0	\$60,109	\$300,188
•	Fire Alarm Replacement	GREEN MEADOWS 667-01	\$259,731	\$0	\$0	\$27,173	\$232,559	\$0	\$0	\$0
•	Common Area Window Replacement	OXFORD TERRACE 667-03	\$41,643	\$0	\$0	\$0	\$0	\$0	\$0	\$22,215
•	Repave Parking Lot	ANTHONY HAVEN 667-05	\$352,999	\$0	\$0	\$31,531	\$321,469	\$0	\$0	\$0
•	Hardwire Smoke and CO Detectors	GREEN MEADOWS II 667-02	\$126,683	\$0	\$0	\$0	\$0	\$0	\$0	\$23,526
<b>TOTALS</b>			\$8,642,661	\$1,184,043	\$537	\$539,456	\$4,010,209	\$1,824,433	\$377,313	\$345,929

## Capital Improvement Plan (CIP)

## FUNDS IN ADDITION TO ANNUAL FORMULA FUNDING AWARD

Cap Hub Project Number	Project Name	DHCD Special Award Comment	Special DHCD Awards				Other Funding			
			Emergency Reserve	Compliance Reserve	Sustainability	Special Awards	CDBG	CPA	Operating Reserve	Other Funds
094054	FF: Replace Boilers & Hot Water Heater Tanks - Rev	E-Bidding/E-Hosting rebate for #094054	\$0	\$0	\$0	\$0	\$0	\$50,000	\$0	\$40,000
094057	FF: ADA Automatic Door Openers at So and No Entrance and Community Room		\$0	\$0	\$0	\$0	\$0	\$40,000	\$0	\$0
094059	FF: Replace Hot Water Boiler & Circulator Oxford Terrace- Rev		\$0	\$0	\$0	\$0	\$0	\$55,285	\$0	\$0
094062	FY18 Sustainability - Energy - Trees	Tree replacement	\$0	\$0	\$5,000	\$0	\$0	\$0	\$0	\$0
094063	FF: Repair Concrete Stairs and Brick		\$0	\$0	\$0	\$0	\$0	\$60,000	\$0	\$0
094065	FF: Replace Windows 667-02		\$0	\$0	\$0	\$0	\$0	\$40,000	\$0	\$0
094069	ModPHASE 2020 Phase 1: Units upgrades, Emergency Generator, Fire Safety Upgrade		\$0	\$0	\$0	\$4,932,524	\$0	\$0	\$0	\$0
094070	H&S FY20: Fire Alarm Repair	H&S FY20: Fire Alarm Repair	\$0	\$0	\$0	\$15,000	\$0	\$0	\$0	\$0

**Capital Improvement Plan (CIP)****FUNDS IN ADDITION TO ANNUAL FORMULA FUNDING AWARD**

Cap Hub Project Number	Project Name	DHCD Special Award Comment	Special DHCD Awards				Other Funding			
			Emergency Reserve	Compliance Reserve	Sustain- ability	Special Awards	CDBG	CPA	Operating Reserve	Other Funds
094071	H&S FY20: replace bath fans/tub cut	H&S FY20: replace bath fans/tub cut	\$0	\$0	\$0	\$9,500	\$0	\$0	\$0	\$0
094072	H&S FY20: Metal Ramp to Courtyard	H&S FY20: Metal Ramp to Courtyard	\$0	\$0	\$0	\$2,000	\$0	\$0	\$0	\$0
094073	H&S FY20: Trim or Remove Tree	H&S FY20: Trim or Remove Tree	\$0	\$0	\$0	\$5,000	\$0	\$0	\$0	\$0
094074	H&S FY20: Stair Treads	H&S FY20: Stair Treads	\$0	\$0	\$0	\$2,500	\$0	\$0	\$0	\$0
<b>TOTALS</b>			\$0	\$0	\$5,000	\$4,966,524	\$0	\$245,285	\$0	\$40,000

## **Capital Improvement Plan (CIP) Narrative**

### **Including Requests to DHCD & Supporting Statements**

#### **1. Request for increased spending flexibility.**

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

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

- Other

FISH'd project 094064 was expected to be spent in Year 1, but due to budget and bidding issues, the project will be re-bid in early spring 2021 which will cause spending to occur in Year 2. Caphub schedule appears accurate. We are proposing to move the 667-5 Repave Parking Lot forward and add 667-1 Fire Alarm Replacement to begin in Year 1, but realistically most of that spending will not occur until beginning of FY22. Then 667-1 Exterior Doors will begin in Year 3. Therefore, the spending rules are not met for years 1, 2 or 3 individually, but the overall 3-year spending is within 20%+/- of the total 3-year CAP share, and year 4 and 5 spending rules are met

#### **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.

Fairhaven Housing Authority has not requested additional funding.

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

The LHA's goals are to maintain our properties in excellent working order on a daily basis, to improve accessibility for our residents, and to update major building systems and envelope components. To accomplish this we will continue to work on developing a new maintenance garage to provide need space for materials and equipment. We are also proposing a repaving project at our 667-05 (the last of our 667 developments to receive new paving) that will improve access and safety, a major fire alarm replacement at our 667-01 development to maintain fire safety, various building envelopment improvement projects and a fire safety improvement project at our 667-02 development.

**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:

FY21 CIP shows an increase in the TDC for FISH 094064 due to budget changes, includes a new CPS project for fire alarm replacement at 667-1 to address a failing and outdated system, shows a decreased TDC for the paving project at 667-05, shows an increased TDC for hardwiring smoke and CO detectors at 667-02, and includes a new project to replace large failed windows in one of the common areas at our 667-03 development. Additionally, we deselected a fire alarm upgrades project that was in the last CIP because that scope will be incorporated into our Modphase project.

**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 06/11/2020.

**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 07/14/2020.

**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:

Several projects are not included in the plan due to insufficient funding. Projects will be addressed as funding becomes available. Some projects will likely be included in the large Modphase projects.

## 10. Accessibility

We have identified the following accessibility deficiencies in our portfolio:

Accessible parking and route to building at 667-05 is in need of improvement, accessible kitchens and baths at 667-03 are outdated and do not comply with current standards.

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

We have included a paving project at 667-05 which will include accessibility improvements, and accessibility deficiencies at 667-03 will be addressed during the Modphase project.

## 11. Special needs development

Fairhaven 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 5/2020.

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

705-01

A letter will be issued to our 705 tenants asking them to be conscientious and conservative when using the water, specifically: To immediately report to the FHA any dripping faucets, leaking or running toilets, to not allow faucets to run without purpose, to shorten lengthy showers, to run full loads of laundry and to not wash vehicles on the property, run hoses or sprinklers or fill pools , and report any leaking outdoor water connections.

## 13. Energy or water saving initiatives

Fairhaven Housing Authority is currently pursuing energy or water-saving audits or grants as note We are waiting for a LEAN audit which may request DHCD sustainability funding in the future.

#### **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% c. 667 (DHCD Goal 2%)

0% c. 200 (DHCD Goal 2%)

0% c. 705 (DHCD Goal 2%)

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

The Authority is showing higher than normal vacancy rates at the current time due to Covid-19 and processing of applicants and applications through CHAMP. Multiple Units have been leased as of 7/15/2020.

#### **15. Vacancies**

Fairhaven Housing Authority has units that are currently vacant that it proposes to keep vacant or offline:

Development #	# of Units	Reason
---------------	------------	--------

Fairhaven Housing Authority has not proposed to newly vacate or re-purpose any units.

Fairhaven Housing Authority has not identified any units at risk of becoming vacant.

Maintenance and Repair Plan

**Maintenance Objective**

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

**About This Maintenance and Repair Plan**

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

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

### **Classification and Prioritization of Maintenance Tasks**

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

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

### Emergency Request System

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

<b>METHOD</b>	<b>CONTACT INFO.</b>	<b>TIMES</b>
Call Answering Service	508-993-1144	Non-business hours
Call LHA at Phone Number	508-993-1144	During business hours, with answerin

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 Fairhaven Housing Authority main office.

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

### Normal Maintenance Request Process

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

<b>METHOD</b>	<b>CONTACT INFO.</b>	<b>TIMES</b>
Text Phone Number		
Call Answering Service	508-993-1144	Non-business hours
Call Housing Authority Office	508-993-1144	During business hours, with answering
Submit Online at Website		
Email to Following Email		
Other		

### Work Order Management

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

Type of work order system:

Work order classification used:

Emergency	
Vacancy	
Preventative Maintenance	
Routine	
Inspections	
Tenant Requests	

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

C. Our work order process includes the following steps:

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

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

We use PHA Web for all work orders.

### **Maintenance Plan Narrative**

Following are Fairhaven Housing Authority's answers to questions posed by DHCD.

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

Our maintenance staff is personable and professional. The tenants often call or write expressing their pleasure with the maintenance staff and the work they have done. The tenants are always very appreciative of the great job they do with snow removal .

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

We engaged an answering service and are working on getting everyone, tenants and staff, familiar with the use of the new service.

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

The goal for the upcoming year is to get back on track following the pandemic.

**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	\$419,025.00	\$242,000.00
Last Fiscal Year Actual Spending	\$348,687.00	\$135,936.00
Current Fiscal Year Budget	\$426,508.00	\$242,000.00

**E. Unit Turnover Summary**

# Turnovers Last Fiscal Year	29
Average time from date vacated to make Unit "Maintenance Ready"	58 days
Average time from date vacated to lease up of unit	74 days

**Attachments**

These items have been prepared by the Fairhaven 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.

**Fairhaven Housing Authority**

**Preventative Maintenance Plan**

**2020**

# Apartment Preventative Maintenance

## **Every 2 Years**

Recaulking of Bathroom sinks and tubs, Kitchen sinks

Recaulking @ roof flashing

Inspect Condenser Coils on Heat Pumps at Oxford Terrace for leaks/Damage

## **Annually**

Change Smoke Detector Batteries

Change Carbon Monoxide Batteries

Change Heat Filters

Clean Stove Valves and Lines

Inspect Apartments for General Maintenance & Cleanliness

- Test Emergency Pull Cords

Recharge Emergency Lighting Batteries

Spray down with a hose all exterior condenser units to remove debris, dirt, pollen, leaves clipping

Check fan coil on Heat Pump/Split Device for buildup of sludge.

## **Quarterly -**

OXFORD TERRACE **ONLY – Clean internal heat pump filters 4x per year**

May – July – October – Jan/Feb.

## **Monthly**

Clean/Test Smoke Detectors

Test Emergency Lighting

Application of Insecticide/Baiting – Common Areas by Exterminator

**WEEKLY**

Test Emergency Generator

**WINTER MONTHS**

**When excess of 2' in snow accumulation occurs check outdoor heat pump units to be sure snow is shoveled away from front of any condenser mounted on a 2' stand.**

# BUILDINGS & GROUNDS PREVENTATIVE MAINTENANCE

## **Every 2 Years**

Caulking of Common Area Bathroom & Kitchen Sinks

Inspect Building Exterior for Termites

## **Annual**

Test Fire Alarm System – (Fire Alarm Service Company)

Test Fire Extinguishers – Recharge/Replace \_ Fire Extinguisher Compliance Company

Building Inspections – Interior Common Areas

Building Exterior - Structure & Roof

Building Exterior - Site (paving, walkways, exterior stairs/ramps, gazebos, curbs, dumpsters, recycle totes)

Change Batteries - Smoke Detectors

Carbon Monoxide Detectors

Change Common Area Heat Filters

Truck Vehicle Inspections

State Elevator Inspections

Boiler Testing/Inspection

## **Bimonthly**

Gutter and Downspout Cleaning

Catch Basin/Parking Lot Drain Cleaning/Clearing

## **Monthly**

Check Exterior for PESTS/RODENTS – Exterminate

Check Hallway Carpets and Common Area Flooring for tripping hazards, holes

Walk interior stairs , check stair treads for tripping hazards, secure railings

Check Laundry Equipment and utility connections.

Check Automatic Exterior Doors – Functioning Properly

## MECHANICAL AND ELECTRICAL SYSTEMS PREVENTATIVE MAINTENANCE

### **Boilers**

#### **Semi -Annually**

Lubricate

Change Filters

#### **Monthly**

Clean/Purge

Test

#### **Weekly – Heating Season**

Check Boiler Pressure

### **Air Conditioners**

#### **Annually**

Change Filters

#### **Weekly – Cooling Season**

Check Temperature

Adjust Timers

## **Elevator**

### **Annually**

Contract with Elevator Service Company

Schedule State Inspection/Certification

### **Monthly**

Service/Maintenance done by Elevator Service Company

### **Weekly**

Visually inspect, observe and use

## **Water System**

### **Annually**

Test System Integrity

Change Washers

Clean

### **Semi Annually**

Lubricate valves and pumps

### **Weekly**

Test Pressure

## **Electrical System**

### **Annually**

Clean

Tighten connections in transformers and junctions

Check Generator Transfer Switches

Replace roof fans to insure proper ventilation

Semi Annually

Re-set Outdoor lighting timers to coordinate with Day Light Savings

### **Monthly**

Test – Check building buzzer systems

### **Weekly**

Check security, Test Surveillance Cameras

## **Sewer System**

### **Quarterly**

Have system flushed/roto rooted – Contract with sewer/drain cleaner company

## Deferred Maintenance Plan

Item	Date added to Deferred Maintenance Plan	Item Description	Location or Unit Number	Reason Deferred	Estimated Cost	Material Needed	Original Work Order Number	Target Completion Date	Actual Completion Date	Other Comments
Bath Fan	7/10/2018		11 - 667/5		300	fan	842	Jan-21	n/a	
Bathroom Floor	2/21/2019	replace tiles		occupied unit	500	VCT tiles	1662			
loose tub tiles	3/5/2019	replace tiles	15 -667/1	occupied unit	500	tub tiles	1756	Dec-20	n/a	
peeling paint	3/28/2019	touch up	109- 667/3	non priority	150	paint	1867	n/a		at turnover
tub grout + caulk	3/28/2019	grout +caulk	146 -667/3	time	75	grout/caulk	1868	Dec-20	n/a	
ceiling blistering	3/28/2019	paint	101-667/3	non priority	500	paint	1869	n/a		at turnover
bath fan, kitchen floor	4/22/2019	fan + VCT tiles	36-705	scheduling	2000	Fan + VCT tiles	1993	Dec-20	n/a	
wall + ceiling stain	5/1/2019	paint	107-667/3	non priority	500	paint	2051	n/a		at turnover
bath fan + remodel	5/6/2019	fan + door	38-705	scheduling	1200	fan +door	2076	Mar-20		COVID
bath fan + remodel	5/6/2019	fan + door	42-705	scheduling	1200	fan + door	2077	Mar-20		COVID
bath fan + remodel	5/6/2019	fan + door	34-705	scheduling	1200	fan + door	2078	Mar-20		COVID
bath fan + remodel	5/6/2019	fan + door	40-705	scheduling	1200	fan + door	2079	Mar-20		COVID
bath fan + remodel	5/6/2019	fan + door	32-705	scheduling	1200	fan + door	2080	Mar-20		COVID
							2081			
kitchen faucet	12/17/2019	replacefaucet	232-667/3	oversight	75	faucet	2874	Jul-20	Jul-20	
peeling paint	12/17/2019	paint bathroom	107-667/3	non-priority	750	paint	2907	n/a		at turnover

**Operating Budget**

The tables on the following pages show the approved budget and actual income and spending per budget account (row) for the fiscal year ending 12/31/2019. 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.

Refer also to the Performance Management Review (PMR) section of this Annual Report for the LHA's response to a "Corrective Action" finding for the "Adjusted Net Income" rating.

**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 Fairhaven Housing Authority operating reserve at the end of fiscal year 2019 was \$1,385,771.00, which is 200.2% of the full reserve amount defined above.

**Annual Plan 2021**  
**Annual Operating Budget**

Consolidated Budget (400-1) for all state-aided 667 (Elderly), 200 (family), and 705 (scattered site family) developments owned by Fairhaven Housing Authority.						
<b>REVENUE</b>						
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	\$1,320,011.00	\$1,371,405.00	\$1,377,155.00	0.4%	\$402.68
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	\$25,564.00	\$24,178.00	\$19,949.00	-17.5%	\$5.83
3611	Interest on Investments - Restricted	\$0.00	\$0.00	\$0.00	0%	\$0.00
3690	Other Revenue	\$32,500.00	\$29,099.00	\$32,500.00	11.7%	\$9.50
3691	Other Revenue - Retained	\$36,000.00	\$95,937.00	\$0.00	-100%	\$0.00
3692	Other Revenue - Operating Reserves	\$34,307.00	\$0.00	\$0.00	0%	\$0.00
3693	Other Revenue - Energy Net Meter	\$0.00	\$0.00	\$60,000.00	100%	\$17.54
3801	Operating Subsidy - DHCD (4001)	\$0.00	\$0.00	\$62,000.00	100%	\$18.13
3802	Operating Subsidy - MRVP Landlords	\$0.00	\$0.00	\$0.00	0%	\$0.00
3803	Restricted Grants Received	\$0.00	\$0.00	\$0.00	0%	\$0.00
3920	Gain/Loss From Sale/Disp. of Prop.	\$0.00	\$0.00	\$0.00	0%	\$0.00
3000	TOTAL REVENUE	\$1,448,382.00	\$1,520,619.00	\$1,551,604.00	2%	\$453.69

**Annual Plan 2021**  
**Annual Operating Budget**

Consolidated Budget (400-1) for all state-aided 667 (Elderly), 200 (family), and 705 (scattered site family) developments owned by Fairhaven Housing Authority.						
<b>EXPENSES</b>						
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	\$209,837.00	\$209,832.00	\$226,511.00	7.9%	\$66.23
4120	Compensated Absences	\$0.00	\$4,409.00	\$0.00	-100%	\$0.00
4130	Legal	\$2,000.00	\$1,076.00	\$2,000.00	85.9%	\$0.58
4140	Members Compensation	\$0.00	\$0.00	\$0.00	0%	\$0.00
4150	Travel & Related Expenses	\$3,740.00	\$1,148.00	\$3,740.00	225.8%	\$1.09
4170	Accounting Services	\$9,060.00	\$9,060.00	\$9,600.00	6%	\$2.81
4171	Audit Costs	\$4,410.00	\$4,432.00	\$4,410.00	-0.5%	\$1.29
4180	Penalties & Interest	\$0.00	\$0.00	\$0.00	0%	\$0.00
4190	Administrative Other	\$38,447.00	\$29,169.00	\$45,646.00	56.5%	\$13.35
4191	Tenant Organization	\$1,704.00	\$441.00	\$1,704.00	286.4%	\$0.50
4100	TOTAL ADMINISTRATION	\$269,198.00	\$259,567.00	\$293,611.00	13.1%	\$85.85
4310	Water	\$83,720.00	\$67,910.00	\$78,200.00	15.2%	\$22.87
4320	Electricity	\$193,600.00	\$178,330.00	\$192,390.00	7.9%	\$56.25
4330	Gas	\$65,000.00	\$48,723.00	\$58,000.00	19%	\$16.96
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	\$30,000.00	100%	\$8.77
4391	Solar Operator Costs	\$30,000.00	\$27,152.00	\$0.00	-100%	\$0.00
4392	Net Meter Utility Credit (Negative Amount)	\$0.00	\$0.00	\$0.00	0%	\$0.00
4300	TOTAL UTILITIES	\$372,320.00	\$322,115.00	\$358,590.00	11.3%	\$104.85

Consolidated Budget (400-1) for all state-aided 667 (Elderly), 200 (family), and 705 (scattered site family) developments owned by Fairhaven Housing Authority.						
<b>EXPENSES</b>						
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	\$269,161.00	\$230,190.00	\$276,644.00	20.2%	\$80.89
4420	Materials & Supplies	\$60,000.00	\$48,340.00	\$60,000.00	24.1%	\$17.54
4430	Contract Costs	\$89,864.00	\$70,157.00	\$89,864.00	28.1%	\$26.28
4400	TOTAL MAINTENANCE	\$419,025.00	\$348,687.00	\$426,508.00	22.3%	\$124.71
4510	Insurance	\$54,642.00	\$56,115.00	\$61,297.00	9.2%	\$17.92
4520	Payment in Lieu of Taxes	\$1,800.00	\$1,800.00	\$1,800.00	0%	\$0.53
4540	Employee Benefits	\$238,796.00	\$232,374.00	\$247,013.00	6.3%	\$72.23
4541	Employee Benefits - GASB 45	\$0.00	\$-62,000.00	\$0.00	-100%	\$0.00
4542	Pension Expense - GASB 68	\$0.00	\$31,000.00	\$0.00	-100%	\$0.00
4570	Collection Loss	\$0.00	\$2,541.00	\$0.00	-100%	\$0.00
4571	Collection Loss - Fraud/Retroactive	\$0.00	\$0.00	\$0.00	0%	\$0.00
4580	Interest Expense	\$0.00	\$0.00	\$0.00	0%	\$0.00
4590	Other General Expense	\$0.00	\$0.00	\$0.00	0%	\$0.00
4500	TOTAL GENERAL EXPENSES	\$295,238.00	\$261,830.00	\$310,110.00	18.4%	\$90.68
4610	Extraordinary Maintenance	\$242,000.00	\$135,936.00	\$242,000.00	78%	\$70.76
4611	Equipment Purchases - Non Capitalized	\$40,000.00	\$25,155.00	\$48,000.00	90.8%	\$14.04
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	\$249,097.00	\$0.00	-100%	\$0.00
4600	TOTAL OTHER EXPENSES	\$282,000.00	\$410,188.00	\$290,000.00	-29.3%	\$84.80
4000	TOTAL EXPENSES	\$1,637,781.00	\$1,602,387.00	\$1,678,819.00	4.8%	\$490.88

Consolidated Budget (400-1) for all state-aided 667 (Elderly), 200 (family), and 705 (scattered site family) developments owned by Fairhaven Housing Authority.						
<b>SUMMARY</b>						
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	\$1,448,382.00	\$1,520,619.00	\$1,551,604.00	2%	\$453.69
4000	TOTAL EXPENSES	\$1,637,781.00	\$1,602,387.00	\$1,678,819.00	4.8%	\$490.88
2700	NET INCOME (DEFICIT)	\$-189,399.00	\$-81,768.00	\$-127,215.00	55.6%	\$-37.20
7520	Replacements of Equip. - Capitalized	\$0.00	\$0.00	\$0.00	0%	\$0.00
7540	Betterments & Additions - Capitalized	\$0.00	\$0.00	\$0.00	0%	\$0.00
7500	TOTAL NONOPERATING EXPENDITURES	\$0.00	\$0.00	\$0.00	0%	\$0.00
7600	EXCESS REVENUE OVER EXPENSES	\$-189,399.00	\$-81,768.00	\$-127,215.00	55.6%	\$-37.20

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

**Category: Management**

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

Rating: No Findings

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

Rating: Corrective Action

Reason: Our 4th quarter TAR report was submitted 16 days late.

Response: We have added a recurring appointment in our calendar that coordinates with our accountant's calendar. See Attachments at end of this report for full explanation.

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

Rating: Operational Guidance

Criterion: Completion of mandatory online board member training

Rating: Operational Guidance

**Category: Financial**

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

Rating: Corrective Action

Reason: Rating is generated from underspending of 18.8%

Response: We will revise that appropriately in the next budget, with help from a coordinated calendar entry with the Accountant. See Attachments at end of this report for full explanation.

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: No findings

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.

	<b>Number of violations cited</b>	<b>Number of violations corrected</b>
<b>Maintenance related violations</b>	0	0
<b>Tenant related violations</b>	0	0

### **Category: Facility Management - Inspections**

Criterion: LHA Conducted 100% of the Unit Inspections.

Rating:

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

Rating:

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

Rating:

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

Rating:

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:

### **Category: Facility Management - Work Order System**

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

Rating:

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

Rating:

Criterion: Vacancy work orders identified, tracked and reportable.

Rating:

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

Rating:

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

Rating:

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

Rating:

Criterion: Requested work orders identified, tracked and reportable.

Rating:

Criterion: 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.

Rating:

**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:

## Explanation of PMR Criteria Ratings

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

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

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

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

CRITERION	DESCRIPTION
Requested Work Orders	<p>Requested work orders should be identified, tracked and reportable.</p> <ul style="list-style-type: none"> <li>• “No Findings”: Requested work orders identified, tracked, reportable and completed regularly</li> <li>• “Operational Guidance”: Requested work orders are not identified and/or tracked and/or reportable, and or completed regularly</li> </ul>
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"> <li>• “No Findings”: Requested work orders are completed within 14 calendar days of tenant request OR added to deferred maintenance plan and/or CIP</li> <li>• “Operational Guidance”: Requested work orders are completed within 15-30 calendar days from the date of tenant request</li> <li>• “Corrective Action”: Requested work orders are completed in over 30 calendar days from the date of tenant request OR not completed</li> </ul>
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"> <li>• “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</li> <li>• “Operational Guidance”: System exists, but no definition has been distributed</li> <li>• “Corrective Action”: Neither a system nor distributed definitions exist</li> </ul>

## **Policies**

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

<b>Policy</b>	<b>Last Ratified by Board Vote</b>	<b>Notes</b>
*Rent Collection Policy	06/17/2018	
*Personnel Policy	10/17/2019	
*Capitalization Policy	04/06/2015	
*Procurement Policy	12/13/2018	
*Grievance Policy	03/21/2018	
Reasonable Accommodations Policy	08/13/2015	
Criminal Offender Records Information (CORI) Policy	09/20/2018	
Smoking Policy	01/15/2015	
Language Access Plan	05/01/2019	
Investment Policy	04/06/2015	
Credit/Debit Card Policy	04/06/2015	
Travel Policy	04/06/2015	

\* 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**

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

<b>Description</b>	<b>Reason</b>	<b>Date Waiver Approved by DHCD</b>	<b>Date Expired</b>
Biennial recertification of c.667 rents	Approved due to manpower and consideration of administrative time.	02/04/2016	12/31/2020

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

## Glossary

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

**AHVP:** Alternative Housing Voucher Program

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

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

**ANUEL:** Allowable Non-Utility Expense Level

**AP:** Annual Plan

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

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

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

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

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

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

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

**CNA:** Capital Needs Assessment

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

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

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

**DHCD:** Massachusetts Department of Housing & Community Development

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

**FF:** Formula Funding

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

**FYE:** Fiscal Year End

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

**HHA:** Host Housing Authority for the RCAT program.

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

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

**LHA:** Local Housing Authority

**LTO:** Local Tenants Organization

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

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

**MOR:** Management and Occupancy Report

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

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

**Performance Management Review (PMR):**

**PMR:** Performance Management Review

**RCAT:** Regional Capital Assistance Team

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

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

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

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

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

## **Attachments**

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

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

- Cover sheet for tenant satisfaction surveys
- Tenant Satisfaction Survey - COMBO
- Performance Management Review.
- PMR Responses

## **Resident Surveys – Background:**

Since 2016 DHCD has been working with the Center for Survey Research at the University of Massachusetts Boston to survey residents in the state public housing units it oversees. The surveys are confidential, mailed directly to the residents and returned to the Center by mail (or, starting in 2019, completed on-line). In Round One of the surveys, conducted over the period 2016-2018, residents of elderly/disabled developments (also known as c. 667 developments) and family units (also known as c. 705 and c. 200 developments) were surveyed in four groups as described below. (Note: there are many more c. 667 units, so they were broken down into three groups).

### **ROUND ONE SURVEYS**

Spring 2016: (c. 200 and c. 705)

Fall 2016: (667 - Group 1)

Fall 2017: (667 - Group 2)

Fall 2018: (667 - Group 3)

By the end of 2018, all residents were surveyed in Round One with one exception: in the case of the twelve housing authorities with **more than** 225 c. 200 family units, a randomly selected group of 225 c. 200 residents were surveyed. This group was determined to be large enough to generate statistically useful results.

Round Two of the surveys began in 2019. The current plan is to complete all Round Two surveys in four groups as follows:

### **ROUND TWO SURVEYS**

Fall 2019 (667 - Group 1) - COMPLETED

Fall 2020 (200s and 705s)

Fall 2021 (667 - Group 2)

Fall 2022 (667 - Group 3)

## **Please Note:**

1. If there were at least twenty responses from residents of BOTH an authority's c.667 units AND from their c.200/705 units, then there is a separate report for each program.
2. If there were fewer than twenty responses in EITHER program, but at least twenty responses combined, then the elderly and family results were combined into a single report.
3. To protect resident confidentiality, survey results are generally reported ONLY for authorities that had at least twenty total resident responses from their combined c.667/200/705 residents. Therefore, a few smaller authorities that didn't have twenty responses do not have a published survey report.
4. Because the 2019-2022 surveys ask some different questions than the 2016-2018 survey, the results can't be combined (i.e., 2019 c.667 results can't be combined with 2016 c.200/705 results, as described in #2 above).
5. Responses from family residents in c.200 and c.705 housing are always combined together.

# FAIRHAVEN HOUSING AUTHORITY

## Chapter 200, 667, and 705 Housing (combined) Summary 2016 - 2018

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 fall of 2018, surveys were sent to 13,304 housing units and 6717 surveys were filled out and returned.
- In the **Fairhaven Housing Authority**, surveys were sent to a total of **284** Chapter 667, 705, and 200 housing units; **150** surveys were completed.

This report provides some information about how the residents from the **Fairhaven Housing Authority** who answered the survey responded. It compares answers to those from the entire state and to those from medium LHAs in Southeastern Massachusetts. These medium LHAs in Southeastern Massachusetts include: Attleborough, Barnstable, Fairhaven, Fall River, Franklin County Regional, Franklin, North Attleborough, and Plymouth.

### Communication

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

	Fairhaven Housing Authority	Medium LHAs in Southeastern MA *	Entire State
Contacted management about a problem or concern.....	75%	81%	79%
Felt they were usually or always treated with courtesy and respect when they contacted management.....	89%	85%	85%
Saw the Capital Improvement Plan.....	32%	27%	28%
Saw the Operating Budget.....	13%	13%	16%
Knew the Executive Director held a meeting with residents...	60%	46%	48%

\* Medium LHAs in Southeastern Massachusetts include: Attleborough, Barnstable, Fairhaven, Fall River, Franklin County Regional, Franklin, North Attleborough, and Plymouth.

## Services and Programs

**49%** of the Fairhaven 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:

	Fairhaven Housing Authority	Medium LHAs in Southeastern MA	Entire State
Job training programs.....	7%	11%	11%
Money management programs ( <i>budgeting, taxes, income building</i> ).....	9%	12%	13%
Children's programs ( <i>tutoring, childcare, afterschool programs</i> ).....	1%	7%	8%
Health and Medical Services ( <i>visiting nurse, meal programs</i> ).....	35%	32%	33%
Adult Education ( <i>GED, ESL, educational counseling</i> ) .....	5%	10%	13%

## Maintenance and Repair

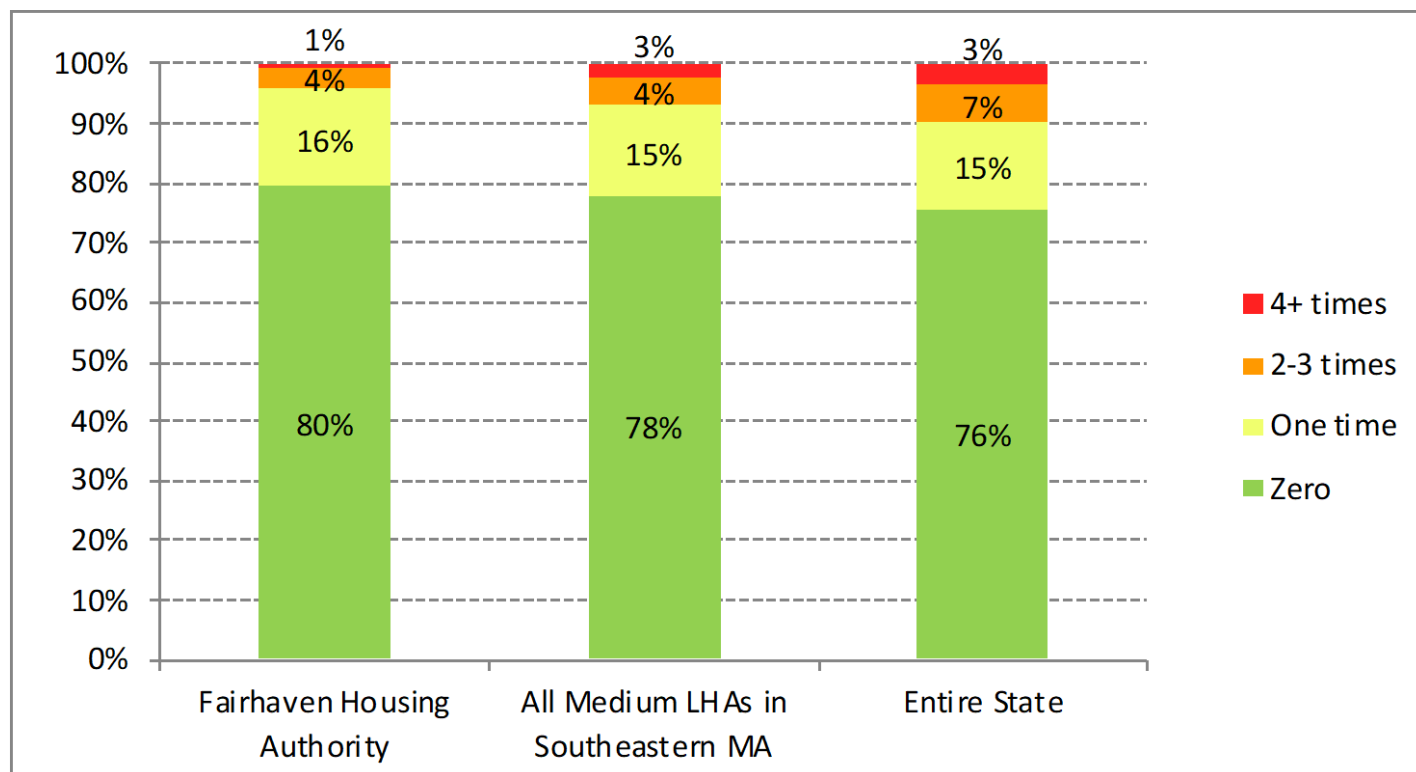
- **Who had problems?** One fifth of respondents had a problem with their heating and about half had a plumbing problem in the last 12 months.

	Fairhaven Housing Authority	Medium LHAs in Southeastern MA	Entire State
Had a heating problem.....	20%	22%	24%
Had a problem with water or plumbing.....	51%	50%	50%

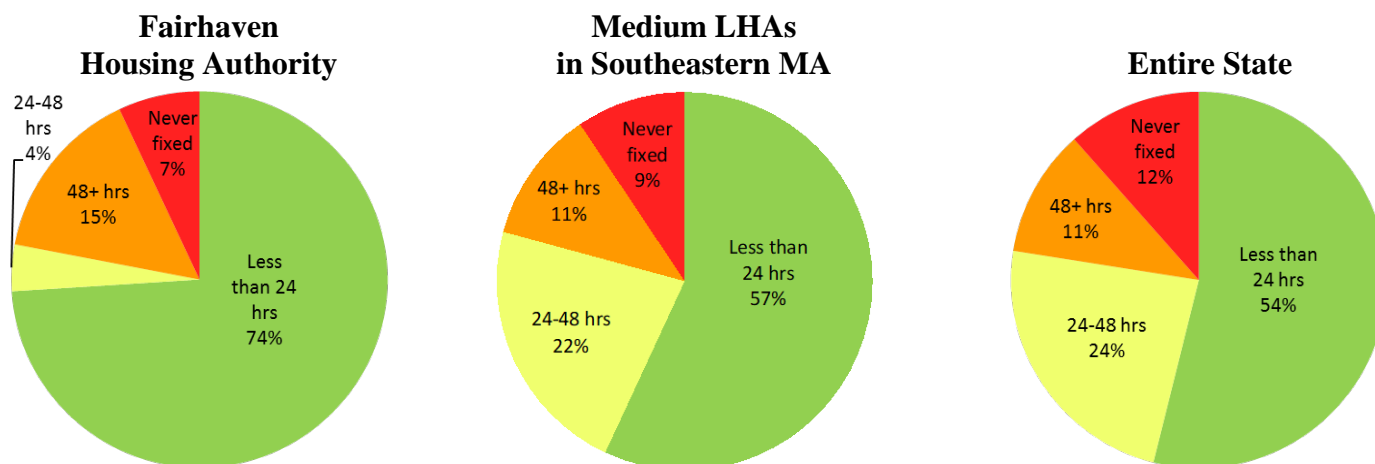
- **Heating Problems**

### How many times did residents have heating problems?

The chart 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.



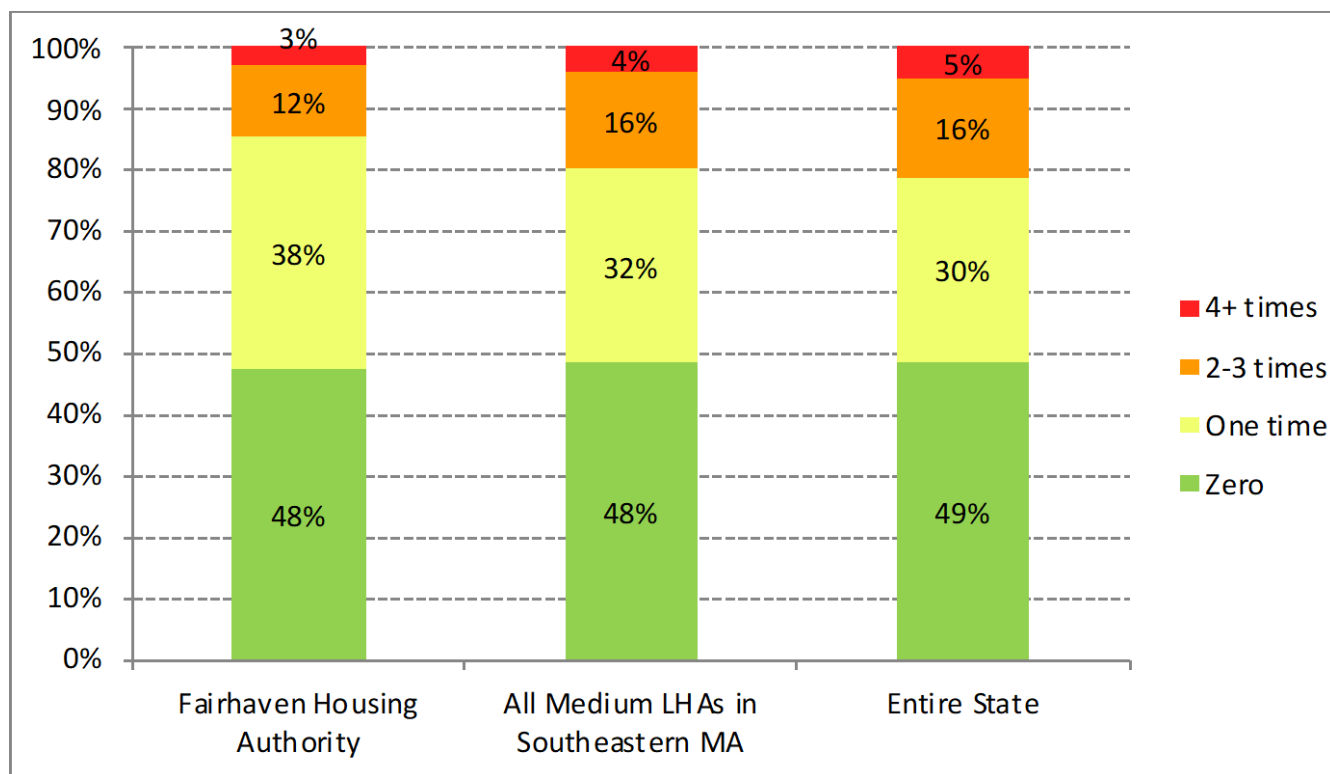
**How long did it take to fix the heating problems?** For those respondents who had problems, we asked how long it usually took for the problems to be fixed – less than 24 hours, 24 - 48 hours, more than 48 hours, or never fixed.



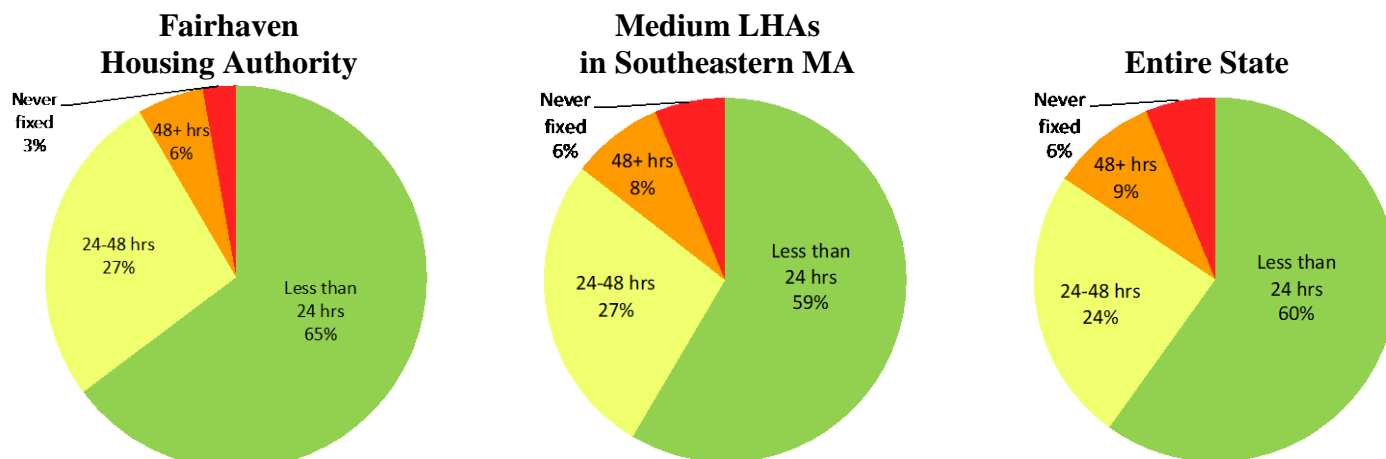
- **Water or Plumbing Problems**

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

The chart 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.

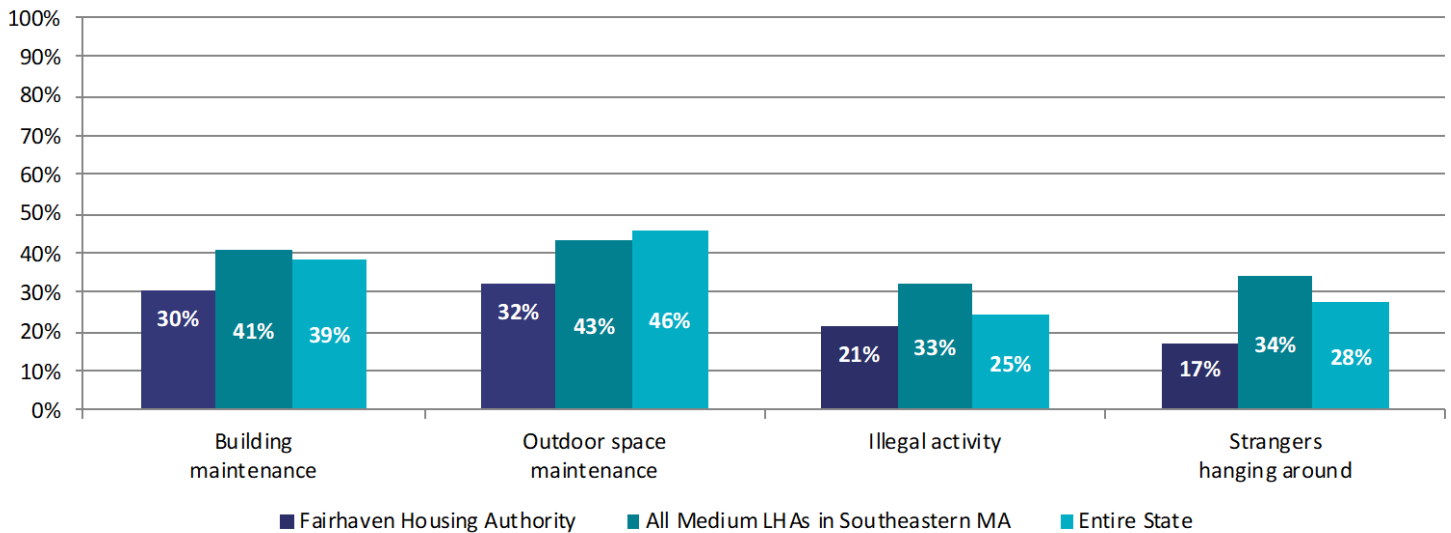


**How long did it take to fix the water or plumbing problems?** For those respondents who had problems, we asked how long it usually took for the problems to be fixed – less than 24 hours, 24 - 48 hours, more than 48 hours, or never fixed.



- **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.

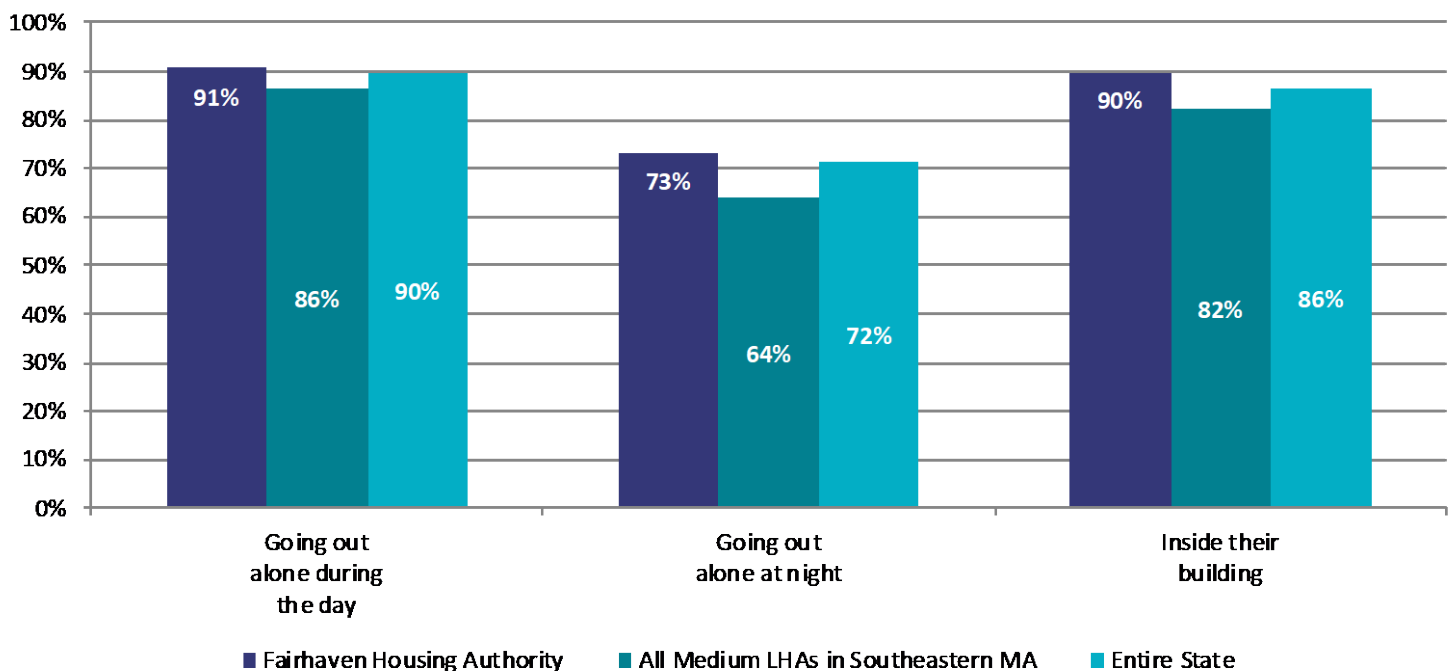
#### Respondents who “always” or “sometimes” had problems with....



### 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” ....



# FAIRHAVEN HOUSING AUTHORITY

## Performance Management Review (PMR) Report

Fiscal Year End 12/31/2019

\*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	Fairhaven Housing Authority
Fiscal Year Ending	12/31/2019
Housing Management Specialist	Mary Farrell
Facilities Management Specialist	Robert Garrett

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

## LHA FAIRHAVEN

### Occupancy

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

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

### Tenant Accounts Receivable (TAR)

Rating All: Corrective Action  
 Rating 667: Corrective Action  
 Rating 200: Not Applicable  
 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.
- ☐ Report to credit bureau when resident has vacated unit with past due rent balance.
- ☐ Consider using small claims court (<https://www.mass.gov/info-details/massachusetts-law-about-small-claims>)
- ☐ Create written repayment agreements, either in house or court ordered, and ensure they are adhered to.
- ☐ Evaluate vacated balances to better understand what is collectible and what is unlikely to be collected. Don't allow tenant balances to build-up before doing lease enforcement. Review aged receivables report regularly.
- ☐ Set reasonable thresholds for commencing legal action.
- ☐ Ensure proper documentation of past due balances and collection efforts with tenants.
- ☒ **Other: Corrective Action is assigned due to late submission of reporting. Please refer to PHN 2018-08 for reporting schedule.**

## 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: Please refer to PHN 2018-08 for due dates.**

## Adjusted Net Income/Revenue

### Rating: Corrective Action

#### 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: Rating is generated from underspending of 18.8%**

## 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: Operational Guidance

- ☐ 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: Three of five Board members have completed the training.**

**PMR Capital Benchmarks for LHA Fiscal Year 2019**

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



# *Fairhaven Housing Authority*

*275 Main Street*

*Fairhaven, Massachusetts 02719-3370*

*(508) 993-1144*

July 7, 2020

DHCD

100 Cambridge St.

Suite 300

Boston, MA 02114

To The Department of Housing and Community Development,

I am writing in response to the written report issued in regard to our Performance Management Review (PMR) Desk Top Audit conducted on April 22, 2019 by Mary Farrell. Mary and I reviewed the findings and discussed the results. It should be noted that the desk top audit was conducted in the midst of the chaos of the pandemic, when the Authority wasn't even sure if the PMR was going to happen as there had been so little communication out of DHCD.

The draft PMR report was shared with the Board of Commissioners of the Fairhaven Housing Authority at their regular Board meeting on June 25, 2020. After discussion, it was determined by the Board that our audit was essentially in compliance but we will offer the following Corrective Action Steps, as required .

Tenant Accounts Receivable (TAR) – Our finding under the TAR category was due to the 4<sup>th</sup> quarter report being submitted 16 days past the deadline. It was not due to an excessively high rate of Tenant Receivables, either once or repeatedly, or bad debts, or write offs. It is hard to fathom that we are being required to write a Corrective Action plan because we were a few days late. Nonetheless, as we stand corrected, all quarterly TAR reports will be submitted within 60 days of the end of the quarter, and within 50 days of the end of the FY end quarter. A reminder will be entered in the calendar scheduling program on the office computer and the bookkeeper's computer, on the calendar/reminder system of the Director's cell phone and the office cell phone, on the written day planner maintained by the Director and entered into the tickler system of the fee accountant. It should be noted at this time , due to covid-19, all required reporting deadlines have been extended , therefore , our compliance should be

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allowed to correspond with the extensions but we will aim to be in compliance with the normal deadlines if possible.

Operating Budget - The Authority and the fee accountant will closely review and note possible budget deviations, either positive or negative, each quarter at the time that the quarterly operating statements are issued. A draft budget revision will be started, maintained and adjusted, tracking increases or decreases that will more accurately reflect the budget as it is being implemented in hopes of having a budget revision ready to be submitted as the year end nears. This should allow us to submit a timely revision as required to correct any categories that are looking likely to be over or under spent by 10%. Please note, the budget has always been an educated guess as to the revenue and expenses anticipated. There are many components of the budget that cannot be properly determined. We do our best to plan and allocate appropriately. The Fairhaven Housing Authority should be commended for maintaining a very healthy reserve and not exceeding budget categories, We are always underspent due to our fiscal management and administration and our productive revenue sources. We are also able to underspend as we have a skilled maintenance staff who can conduct and correct many projects, work orders and tasks in house and save handsomely on contract costs.

Board Member Training – The current Board member needing to complete the training was informed at the meeting on June 25<sup>th</sup> and he has committed to completing the training within 60 days. He received refreshed guidance and the link to complete the training on 7/6/2020. Our second member who had not been in compliance did not seek re-election. Our new Board member who was elected on June 8, 2020 has been informed of the requirement and has been given the information and link as well and will be working to complete it in a timely fashion. However, it should be noted that our newly elected Board member is a tenant who just had an accident that resulted in a broken rib and hand surgery so there may be a delay in getting everything done. The new Board member may ask for a reasonable accommodation.

Once again, the Board of the Fairhaven Housing Authority takes extreme pride in their ability to implement cost-effective measures and savings, to work diligently to abide by laws and regulations and to run a well maintained, highly regarded and sought after place to live for the elderly, disabled and low income families.

Sincerely,



Krisanne M. Sheedy

Executive Director