Weymouth Housing Authority
Annual Plan for Fiscal Year 2021
For State-Aided Public Housing

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

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

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

Overview and Certification

The Weymouth 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. Pope Tower & Joseph Crehan LTO Letters
    b. Pope Tower & Joseph Crehan LTO's Letters
    c. AP Hearing Comments
    d. Cover sheet for tenant satisfaction surveys
    e. Tenant Satisfaction Survey - 667only
    f. Tenant Satisfaction Survey - 200-705only
    g. Performance Management Review.

State-Aided Public Housing Developments

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

Dev No	Type	Development Name	Num Bldgs	Year Built	Dwelling Units
667-01	Elderly	JOSEPH CREHAN 667-01	8	1965	80
667-02	Elderly	JOSEPH CREHAN 667-02	6	1967	76
200-01	Family	LAKEVIEW MANOR 200-01	44	1949	189
667-03	Elderly	POPE TOWERS 667-03	1	1980	60
Total			59		405

Massachusetts Rental Voucher Program (MRVP)

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

Weymouth Housing Authority manages 116 MRVP vouchers.

Federally Assisted Developments

Weymouth Housing Authority also manages Federally-assisted public housing developments and/or federal rental subsidy vouchers serving 289 households.

LHA Central Office

Weymouth Housing Authority
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Michael Flaherty, Executive Director
Phone: 781-331-2323
Email: mflaherty@weymouthhousing.org

LHA Board of Commissioners

	Role	Category	From	To
Edward Hancock	Member	Labor Appointee	07/13/2020	07/14/2025
Joyce Jung		Federal Tenant Rep	02/01/2016	02/01/2021
Helen Maloney	Treasurer		06/01/2013	06/08/2023
Victor Pap	Chair	State Appointee	08/01/2007	08/19/2016
James Parker	Member		07/01/2019	06/30/2024

Local Tenant Organizations

	Date of Recognition by LHA	Date LHA Reviewed Draft AP with LTO
Joseph Crehan	11/12/2018	09/06/2020
Pope Tower	12/05/2019	09/06/2020

Resident Advisory Board

	Date of Recognition by LHA	Date LHA Reviewed Draft AP with RAB
N/A		
N/A		
N/A		
N/A		
N/A		
N/A		
N/A		

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.	07/31/2020
B.	Advertise the public hearing in public postings.	07/31/2020
C.	Notify all LTO's of the hearing and provide access to the Proposed Annual Plan.	07/31/2020
D.	Post draft AP for tenant and public viewing.	07/31/2020
E.	Hold quarterly meeting with LTO to review the draft AP. (Must occur before the Public Hearing.)	09/06/2020
F.	Annual Plan Hearing. Hosted by the LHA Board, with a quorum of members present. (For Boston, the Administrator will host the hearing.)	09/21/2020
G.	Executive Director presents the Annual Plan to the Board.	09/21/2020
H.	Board votes to approve the AP. (For Boston Housing Authority, the Administrator approves and submits the AP.)	09/21/2020

Certification

CERTIFICATION FOR SUBMISSION OF THE ANNUAL PLAN

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

Date of certification: 11/02/2020

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 approval.

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)	$1,462,106.86		Total of all FF awards minus prior FF spending
LHA Emergency Reserve	$219,316.03		Amount to reserve for emergencies
Net FF Funds (First 3 Years of the CIP)	$1,242,790.83	$1,351,803.30	Funds to plan & amount actually planned in the first 3 years of the CIP
ADA Set-aside	$10,031.61	$10,031.61	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)	$1,232,759.22	$1,341,771.69	Funds awarded by DHCD to be used on projects selected by the LHA and approved by DHCD.
Special DHCD Funding	$95,000.00	$95,000.00	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 of town for specific projects.
Operating Reserve(OR) Funds	$0.00	$0.00	Funds from the LHA's operating budget.
Other Funds	$0.00	$0.00	Funds other than those in the above categories. See explanation below.
Total funds and planned spending	$1,337,790.83	$1,446,803.30	Total of all anticipated funding available for planned projects and the total of planned spending.

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.

Regional Capital Assistance Team

Weymouth 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
336027	2008 FF Master CFA	LAKEVIEW MANOR 200-01	$7,900	$7,900	$0	$0	$0	$0	$0	$0
336044	FF: Windows Phase 1	POPE TOWERS 667-03	$179,663	$30,543	$0	$149,120	$0	$0	$0	$0
336058	FY17 Sustainability - Water - 211 toilets and showerheads	LAKEVIEW MANOR 200-01	$95,000	$0	$0	$0	$95,000	$0	$0	$0
336063	FF: Replace Roofs - Dev Wide Phase 1	LAKEVIEW MANOR 200-01	$567,632	$468,320	$0	$99,313	$0	$0	$0	$0
336066	FF: Unit Rehab - 111 Joseph Fern Court	LAKEVIEW MANOR 200-01	$69,718	$7,616	$1,120	$61,515	$0	$0	$0	$0
336067	Demo Vacant Building 46 - Child Care Center	LAKEVIEW MANOR 200-01	$75,950	$1,600	$8,182	$74,350	$0	$0	$0	$0
336069	Replace Roofs - Dev Wide LM Phase 2	LAKEVIEW MANOR 200-01	$760,880	$23,055	$0	$737,826	$0	$0	$0	$0
336071	Kitchen cabinet & countertop replacement - materials only	LAKEVIEW MANOR 200-01	$27,468	$22,358	$0	$5,110	$0	$0	$0	$0
336072	Hot water tank replacement - materials only	LAKEVIEW MANOR 200-01	$16,782	$14,274	$0	$2,508	$0	$0	$0	$0
336073	Select Walkway Repair - Asphalt	LAKEVIEW MANOR 200-01	$11,113	$0	$0	$11,113	$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
336074	Tree Removal & Trimming Ph. 2 - Joe Fern Ct	LAKEVIEW MANOR 200-01	$16,201	$14,388	$0	$1,813	$0	$0	$0	$0
•	SUST: Insulation Upgrade (200-1)	LAKEVIEW MANOR 200-01	$110,000	$0	$0	$0	$0	$110,000	$0	$0
•	Asphalt/concrete walkway repair/replace	LAKEVIEW MANOR 200-01	$285,663	$0	$0	$0	$0	$100,487	$185,177	$0
•	Kitchen Modernization 667-1	JOSEPH CREHAN 667-01	$297,500	$0	$0	$0	$0	$2,790	$176,294	$118,417
•	Fire Alarm System Study (667-1)	JOSEPH CREHAN 667-01	$8,125	$0	$0	$8,125	$0	$0	$0	$0
•	Storm door installation	JOSEPH CREHAN 667-02	$50,688	$0	$0	$0	$0	$50,688	$0	$0
•	Kitchen Modernization 667-2	JOSEPH CREHAN 667-02	$287,500	$0	$0	$0	$0	$0	$48,819	$238,682
•	Roll-In Shower Install in ADA units - 667-3	POPE TOWERS 667-03	$124,085	$0	$0	$0	$0	$124,085	$0	$0
•	Fire Alarm System Study (667-3)	POPE TOWERS 667-03	$7,150	$0	$0	$7,150	$0	$0	$0	$0
•	Generator Replacement (667-3)	POPE TOWERS 667-03	$85,230	$0	$0	$0	$0	$0	$85,230	$0
•	Building Facade Repair (667-3)	POPE TOWERS 667-03	$6,250	$0	$0	$0	$0	$6,250	$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
•	Window Replacement - 667-3 - Phase 2	POPE TOWERS 667-03	$194,102	$0	$0	$194,102	$0	$0	$0	$0
•	Tree Removal (667-3)	POPE TOWERS 667-03	$10,200	$0	$0	$0	$0	$10,200	$0	$0
TOTALS			$3,294,799	$590,052	$9,302	$1,352,044	$95,000	$404,499	$495,520	$357,099

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
336058	FY17 Sustainability - Water - 211 toilets and showerheads	Toilets & showerheads (211)	$0	$0	$95,000	$0	$0	$0	$0	$0
TOTALS			$0	$0	$95,000	$0	$0	$0	$0	$0

Capital Improvement Plan (CIP) Narrative

Including Requests to DHCD & Supporting Statements

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

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

- Other

The Master CFA amount of $442 is greater than CAP share of $0.

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.

Weymouth Housing Authority has not requested additional funding.

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

The overall goal of the Authority is to provide safe and healthy housing for its residents. We recently have completed many large projects; including Roof Replacements and Waste Pipe projects at our 200-1 property; a large parking and roadway project at 667-1 & 667-2, and a Window Replacement project for our high-rise property 667-3. Completing remaining windows at and installation of roll-in showers at 667-3 remain priority projects.

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:

There are minimal changes to CIP aside form addition of new projects in Year 5. Some projects (Asphalt Walkways, Roll-In Showers, Windows Phase 2) were increased to match market pricing or re-evaluation of scope/size of 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 05/14/2020.

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 07/31/2020.

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

9. **High priority deficiencies**
   We have not been able to include all of our high priority (CPS priority 1 and 2) projects in our CIP:
   See attached

10. **Accessibility**
    We have identified the following accessibility deficiencies in our portfolio:
    667-3 Pope Towers has 6 ADA units that do not have a roll-in shower. We have had to turn away potential residents in the past who required a roll-in shower.

    We have incorporated the following projects in our CIP to address accessibility deficiencies:
    We have a project for installation of Roll-in Showers for these 6 units at 667-3 in CIP.

11. **Special needs development**
    Weymouth 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
	667-01			200-01
	667-02			

We have a SUST project for installation of low flow toilets at 200-1. This project will be moving forward once COVID guidance allows unit access. In addition, we have a SUST application requires for insulation upgrade at 200-1 (after recent roof project). We plan to request additional SUST funding for following year for insulation upgrade and air sealing at 667-1 & 667-2.

13. Energy or water saving initiatives

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

14. Vacancy rate

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

1% c. 667 (DHCD Goal 2%)
4% c. 200 (DHCD Goal 2%)
0% c. 705 (DHCD Goal 2%)

Weymouth Housing Authority will address the excess vacancies in the following manner: Higher than usual vacancies and additional challenges for lease up during pandemic.

15. Vacancies

Weymouth Housing Authority has no units listed as vacant, proposed to be vacant, or 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.
     - Inspections are visual and operational examinations of parts of our property to determine their condition.
     - All dwelling units, buildings and sites must be inspected at least annually.
     - **Goal: Inspection-generated work orders are completed within 30 calendar days from the date of inspection, OR if cannot be completed within 30 calendar days, are added to the Deferred Maintenance Plan or the Capital Improvement Plan in the case of qualifying capital repairs (unless health/safety issue).**

V. **Requested Maintenance** - Work which is requested by residents or others, does not fall into any category above, and should be accomplished as time and funds are available.
   - Requests from residents or others for maintenance work which does not fall into one of the other categories has the lowest priority for staff assignment.
   - **Goal: Requested work orders are completed in 14 calendar days from the date of tenant request or if not completed within that timeframe (and not a health or safety issue), the task is added and completed in a timely manner as a part of the Deferred Maintenance Plan and/or CIP.**

Additional Remarks by the Weymouth Housing Authority

PHA WEB

Emergency Request System

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

METHOD	CONTACT INFO.	TIMES
Call Answering Service	781-331-2323	24-7
Call LHA at Phone Number	781-331-2323	8:30 AM -4:00 PM- M-F

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 Weymouth Housing Authority main office.

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

Normal Maintenance Request Process

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

METHOD	CONTACT INFO.	TIMES
Text Phone Number		
Call Answering Service	781-331-2323	24-7
Call Housing Authority Office	781-331-2323	8:30 AM 4 PM
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: DHCD's usual on-site review for this housing

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.	☑
2	Maintenance Requests logged into the work system	☑
3	Work Orders generated	☑
4	Work Orders assigned	☑
5	Work Orders tracked	☑
6	Work Orders completed/closed out	☑
7	Maintenance Reports or Lists generated	☑

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

None

Maintenance Plan Narrative

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

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

The Weymouth Housing Authority's Maintenance Plan is very well thought out and takes in to account each of the developments unique characteristics into account in an effort to address resident concerns in a reasonable time frame

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

None

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

Our goals at The Weymouth Housing Authority for the coming year are to continue our quest to provide a safe decent and affordable place for our residents to flourish in.
We strive to resolve any and all resident issues in a timely fashion to improve the quality of life for our residents. We want to continue to provide quality service to our residents . We als

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	$585,067.00	$163,026.00
Last Fiscal Year Actual Spending	$518,444.00	$143,382.00
Current Fiscal Year Budget	$0.00	$0.00

E. Unit Turnover Summary

# Turnovers Last Fiscal Year	31
Average time from date vacated to make Unit "Maintenance Ready"	13 days
Average time from date vacated to lease up of unit	35 days

Attachments

These items have been prepared by the Weymouth 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.

	As Needed	Vendor												
WALLS - Repair mortar joints, Replace Bricks (as needed)	Annually / As Needed	Staff / Vendor				X								
WINDOWS - Wash, re-caulk if needed	Annually	Staff / Vendor				X								
DOORS - Wash, check weather stripping, re-paint as needed	Annually	Staff				X								
DECKS, EXT STAIRS - Wash	Annually	Staff				X								
FOUNDATION - Check cracks, vent covers	Annually	Staff				X								
EXTERIOR SURFACES, FIXTURES - Refinish	Every 10yrs	Staff / Vendor												
Building Interior														
WOOD FLOORS - Refinish, polish	As Needed	Staff												
VINYL FLOORS - Refinish, polish	As Needed	Staff												
CEILINGS - Refinish	As Needed	Staff / Vendor												
WALLS - Refinish	As Needed	Staff / Vendor												
WALLS - Recaulk (kitchen and bath)	As Needed	Staff /												
FLOORS - Professionally clean common area	Annually	Vendor				X								
WALLS - Wash off hand prints and dirt in high	Weekly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Pest Control														
PEST CONTROL - Notify residents, Apply Chemicals	Monthly / As Needed	Vendor	X	X	X	X	X	X	X	X	X	X	X	X
Common Kitchen, Laundry														
KITCHEN - Clean Range, Microwave, Refrigerator	Monthly / Annually	Staff												
GAS STOVE - Valve and line cleaning	Annually	Vendor									X			
LAUNDRY - Wipe surfaces, empty trash, mop floor, clean behind machines, check lint traps and clean as needed	Weekly	Staff												
LAUNDRY - Professionally clean dryer vents	Annually	Vendor												

Aerate lawn/overseed/top dress with compost	Annually	Staff				X								
Mulch landscape beds	Annually	Staff				X								
Shrubs, Trees (remove broken, dead, deformed branches)	Weekly / Seasonal	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Remove weeds (don't let weeds go to seed)	Daily	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Protect Shrubs (winter)	Seasonally											X	X	
Pest / Disease - Monitor, Integrated Pest Mgmt & Natural Gardening. DON'T use products harmful to environment	Monthly	Staff				X	X	X	X	X	X	X		
Watering/Irrigation - soak (dry out before watering again)	Weekly / Seasonal	Staff				X	X	X	X	X	X	X		
Irrigation System														
Spring (Start) / Fall (Shutdown) - blow out lines	Bi-Annually	Vendor												
Grounds														
Signage - inspect, clean, repair as needed	Monthly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Walks, Paving, Curbs - monitor, clean, repair as needed	Monthly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Parking Lot - Monitor condition, clean and reseal as needed	Annually	Staff / Vendor									X			
Fence - monitor condition, clean and repaint as needed	Annually	Staff					X							

Water system														
Test / Check Water Temperatures	Bi-Annually / Annually	Staff					X					X		
Lubricate valves and pumps	Bi-Annually	Vendor					X					X		
Clean, Test integrity, Change Washers	Annually	Staff / Vendor									X			
Test pressure	Weekly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Plumbing														
Toilets - check for leaks, running water	Annually	Staff						X						
Faucets and shut-offs - check for leaks, drips	Annually	Staff						X						
Boilers/HW Tanks - Inspect, service	Quarterly	Staff / Vendor			X			X			X			X
Pumps - sump pump in basement, confirm operational	Weekly / Monthly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Fire Sprinklers														
Inspect, Test Backflow	Annually	Vendor												
Sanitary system														
Clean, Lubricate valves and pumps	Bi-Annually	Vendor					X					X		
Replace toilet mechanism	Every 5yrs	Staff / Vendor									X			
Test system integrity	Annually	Staff / Vendor									X			
Storm drain system														
Clean, Lubricate valves and pumps	Bi-Annually	Vendor					X					X		
Test system integrity	Annually	Staff / Vendor									X			
Electrical system														
Tighten connections in transformers and junctions	As Needed	Vendor	Recommended by DHCD's Handbook. **However, if this was never performed, then it should be performed by licensed EC after an infrared test by a Testing Company**											
Clean, Test	As Needed	Vendor												
Fire Alarms														
System (Hardwired) - Clean, Test	Annually	Vendor							X					
Fire Extinguishers - Test, Recharge, Replace (if necessary)	Annually	Vendor							X					

ALL Light Fixtures														
Lighting - clean fixtures, replace lamps as needed	Monthly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Security systems														
Test system	Monthly	Staff												
Elevator system														
Test lights	Monthly	Staff												
Mechanical - professional service contract	Quarterly / Annually	Vendor												
Solid waste disposal system														
Clean compactors, Lubricate machinery	Monthly	Staff												
Lubricate trash chute doors	Bi-Annually	Staff												

Refinish floors	At Turnover / As Needed	Satff												
Ceilings														
Refinish	At Turnover / As Needed	staff												
Walls														
Refinish	At Turnover / As Needed	Satff												
Recaulk (kitchen and bath)	At Turnover / As Needed	Satff												
Kitchen fixtures														
KITCHEN - Clean Range, Microwave, Refrigerator	Annually													
GAS STOVE - Valve and line cleaning	Annually	Vendor												
UNIT APPLIANCES - clean interior and exterior, vacuum under and behind	Annually	Resident Staff						X						
HVAC fixtures														
Air Source Heat Pumps - Vacuum, Clean Condenser	Annually	Staff												
Unit Forced Hot Water - Check for Air locks, Bleed	Annually	Staff / Vendor									X	X		
Unit Electrical Baseboard - Vacuum around fins	Annually	Resident										X		
Unit Forced Hot Air - Vacuum Vents	Annually	Resident										X		
Unit Bathroom Fans - Inspect, Vacuum, Clean covers	Annually	Resident						X						

Machine Preventive Maintenance

Automobile

TASK	Frequency	By	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Lubricate, Change Filters	Per Manufacturers Recommendations	Vendor										X		
Change tires	Rotate Annually	Vendor										X		
Replace brakes, other fixed life parts	Per Manufacturers Recommendations	Vendor										X		
Change brushes on sweepers	Annually	Vendor										X		
Annual Sticker (Vehicles, Trailers)	Annually **(Varies)**	Vendor												
Small Engines														
ALL WORK by Service Contract	Per Manufacturers Recommendations	Vendor										X		
OIL - Check Level , Change, Replace Filter	Per Manufacturers Recommendations	Staff										X		
Air Filter - Replace Foam/Paper Air cleaner	Per Manufacturers Recommendations (**OR** Every Season)	Staff										X		
Replace Spark Plug, In-line Fuel Filter	Per Manufacturers Recommendations (**OR** Every 100 Hrs)	Staff										X		
Prep Work Season Start, Season End)	Bi-Annually	Staff			X							X		
Snow Removal and Sanding Equipment	Annually											X		

	As Needed	Vendor												
WALLS - Repair mortar joints, Replace Bricks (as needed)	Annually / As Needed	Staff / Vendor				X								
WINDOWS - Wash, re-caulk if needed	Annually	Staff / Vendor				X								
DOORS - Wash, check weather stripping, re-paint as needed	Annually	Staff				X								
DECKS, EXT STAIRS - Wash	Annually	Staff				X								
FOUNDATION - Check cracks, vent covers	Annually	Staff				X								
EXTERIOR SURFACES, FIXTURES - Refinish	Every 10yrs	Staff / Vendor												
Building Interior														
WOOD FLOORS - Refinish, polish	As Needed	Staff												
VINYL FLOORS - Refinish, polish	As Needed	Staff												
CEILINGS - Refinish	As Needed	Staff / Vendor												
WALLS - Refinish	As Needed	Staff / Vendor												
WALLS - Recaulk (kitchen and bath)	As Needed	Staff /												
FLOORS - Professionally clean common area	Annually	Vendor				X								
WALLS - Wash off hand prints and dirt in high	Weekly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Pest Control														
PEST CONTROL - Notify residents, Apply Chemicals	Monthly / As Needed	Vendor	X	X	X	X	X	X	X	X	X	X	X	X
Common Kitchen, Laundry														
KITCHEN - Clean Range, Microwave, Refrigerator	Monthly / Annually	Staff	X	X	X	X	X	X	X	X	X	X	X	X
GAS STOVE - Valve and line cleaning	Annually	Vendor									X			
LAUNDRY - Wipe surfaces, empty trash, mop floor, clean behind machines, check lint traps and clean as needed	Weekly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
LAUNDRY - Professionally clean dryer vents	Annually	Vendor									X			

Aerate lawn/overseed/top dress with compost	Annually	Staff				X								
Mulch landscape beds	Annually	Staff				X								
Shrubs, Trees (remove broken, dead, deformed branches)	Weekly / Seasonal	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Remove weeds (don't let weeds go to seed)	Daily	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Protect Shrubs (winter)	Seasonally											X	X	
Pest / Disease - Monitor, Integrated Pest Mgmt & Natural Gardening. DON'T use products harmful to environment	Monthly	Staff				X	X	X	X	X	X	X		
Watering/Irrigation - soak (dry out before watering again)	Weekly / Seasonal	Staff				X	X	X	X	X	X	X		
Irrigation System														
Spring (Start) / Fall (Shutdown) - blow out lines	Bi-Annually	Vendor												
Grounds														
Signage - inspect, clean, repair as needed	Monthly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Walks, Paving, Curbs - monitor, clean, repair as needed	Monthly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Parking Lot - Monitor condition, clean and reseal as needed	Annually	Staff / Vendor									X			
Fence - monitor condition, clean and repaint as needed	Annually	Staff					X							

Water system														
Test / Check Water Temperatures	Bi-Annually / Annually	Staff					X					X		
Lubricate valves and pumps	Bi-Annually		NA											
Clean, Test integrity, Change Washers	Annually	Staff / Vendor									X			
Test pressure	Weekly	Staff	NA											
Plumbing														
Toilets - check for leaks, running water	Annually	Staff						X						
Faucets and shut-offs - check for leaks, drips	Annually	Staff						X						
Boilers/HW Tanks - Inspect, service	Quarterly	Staff / Vendor			X			X			X			X
Pumps - sump pump in basement, confirm operational	Weekly / Monthly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Fire Sprinklers														
Inspect, Test Backflow	Annually	Vendor	NA											
Sanitary system														
Clean, Lubricate valves and pumps	Bi-Annually	Vendor					X					X		
Replace toilet mechanism	Every 5yrs	Staff / Vendor									X			
Test system integrity	Annually	Staff / Vendor									X			
Storm drain system														
Clean, Lubricate valves and pumps	Bi-Annually	Vendor					X					X		
Test system integrity	Annually	Staff / Vendor									X			
Electrical system														
Tighten connections in transformers and junctions	As Needed	Vendor	Recommended by DHCD's Handbook. **However, if this was never performed, then it should be performed by licensed EC after an infrared test by a Testing Company**											
Clean, Test	As Needed	Vendor												
Fire Alarms														
System (Hardwired) - Clean, Test	Annually	Vendor							X					
Fire Extinguishers - Test, Recharge, Replace (if necessary)	Annually	Vendor							X					

ALL Light Fixtures														
Lighting - clean fixtures, replace lamps as needed	Monthly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Security systems														
Test system	Monthly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Elevator system														
Test lights	Monthly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Mechanical - professional service contract	Quarterly / Annually	Vendor			X			X			X			X
Solid waste disposal system														
Clean compactors, Lubricate machinery	Monthly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Lubricate trash chute doors	Bi-Annually	Staff				X						X		

Refinish floors	As Needed													
Ceilings														
Refinish	At Turnover / As Needed													
Walls														
Refinish	At Turnover / As Needed													
Recaulk (kitchen and bath)	At Turnover / As Needed													
Kitchen fixtures														
KITCHEN - Clean Range, Microwave, Refrigerator	Annually										X			
GAS STOVE - Valve and line cleaning	Annually	Vendor									X			
UNIT APPLIANCES - clean interior and exterior, vacuum under and behind	Annually	Resident Staff						X						
HVAC fixtures														
Air Source Heat Pumps - Vacuum, Clean Condenser	Annually	Staff										X		
Unit Forced Hot Water - Check for Air locks, Bleed	Annually	Staff / Vendor									X	X		
Unit Electrical Baseboard - Vacuum around fins	Annually	Resident										X		
Unit Forced Hot Air - Vacuum Vents	Annually	Resident										X		
Unit Bathroom Fans - Inspect, Vacuum, Clean covers	Annually	Resident						X						

Machine Preventive Maintenance

Automobile

TASK	Frequency	By	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Lubricate, Change Filters	Per Manufacturers Recommendations	Vendor										X		
Change tires	Rotate Annually	Vendor										X		
Replace brakes, other fixed life parts	Per Manufacturers Recommendations	Vendor										X		
Change brushes on sweepers	Annually	Vendor										X		
Annual Sticker (Vehicles, Trailers)	Annually **(Varies)**	Vendor												
Small Engines														
ALL WORK by Service Contract	Per Manufacturers Recommendations	Vendor										X		
OIL - Check Level , Change, Replace Filter	Per Manufacturers Recommendations	Staff										X		
Air Filter - Replace Foam/Paper Air cleaner	Per Manufacturers Recommendations (**OR** Every Season)	Staff										X		
Replace Spark Plug, In-line Fuel Filter	Per Manufacturers Recommendations (**OR** Every 100 Hrs)	Staff										X		
Prep Work Season Start, Season End)	Bi-Annually	Staff			X							X		
Snow Removal and Sanding Equipment	Annually											X		

[illegible]	As Needed	Vendor												
WALLS - Repair mortar joints, Replace Bricks (as needed)	Annually / As Needed	Staff / Vendor				X								
WINDOWS - Wash, re-caulk if needed	Annually	Staff / Vendor				X								
DOORS - Wash, check weather stripping, re-paint as needed	Annually	Staff				X								
DECKS, EXT STAIRS - Wash	Annually	Staff				X								
FOUNDATION - Check cracks, vent covers	Annually	Staff				X								
EXTERIOR SURFACES, FIXTURES - Refinish	Every 10yrs	Staff / Vendor												
Building Interior														
WOOD FLOORS - Refinish, polish	As Needed	Staff												
VINYL FLOORS - Refinish, polish	As Needed	Staff	X	X	X	X	X	X	X	X	X	X	X	X
CEILINGS - Refinish	As Needed	Staff / Vendor												
WALLS - Refinish	As Needed	Staff / Vendor												
WALLS - Recaulk (kitchen and bath)	As Needed	Staff /												
FLOORS - Professionally clean common area	Annually	Vendor				X								
WALLS - Wash off hand prints and dirt in high	Weekly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Pest Control														
PEST CONTROL - Notify residents, Apply Chemicals	Monthly / As Needed	Vendor	X	X	X	X	X	X	X	X	X	X	X	X
Common Kitchen, Laundry														
KITCHEN - Clean Range, Microwave, Refrigerator	Monthly / Annually	Staff	X	X	X	X	X	X	X	X	X	X	X	X
GAS STOVE - Valve and line cleaning	Annually	Vendor									X			
LAUNDRY - Wipe surfaces, empty trash, mop floor, clean behind machines, check lint traps and clean as needed	Weekly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
LAUNDRY - Professionally clean dryer vents	Annually	Vendor									X			

Aerate lawn/overseed/top dress with compost	Annually	Staff				X								
Mulch landscape beds	Annually	Staff				X								
Shrubs, Trees (remove broken, dead, deformed branches)	Weekly / Seasonal	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Remove weeds (don't let weeds go to seed)	Daily	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Protect Shrubs (winter)	Seasonally											X	X	
Pest / Disease - Monitor, Integrated Pest Mgmt & Natural Gardening. DON'T use products harmful to environment	Monthly	Staff				X	X	X	X	X	X	X		
Watering/Irrigation - soak (dry out before watering again)	Weekly / Seasonal	Staff				X	X	X	X	X	X	X		
Irrigation System														
Spring (Start) / Fall (Shutdown) - blow out lines	Bi-Annually	Vendor												
Grounds														
Signage - inspect, clean, repair as needed	Monthly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Walks, Paving, Curbs - monitor, clean, repair as needed	Monthly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Parking Lot - Monitor condition, clean and reseal as needed	Annually	Staff / Vendor									X			
Fence - monitor condition, clean and repaint as needed	Annually	Staff												

Water system														
Test / Check Water Temperatures	Bi-Annually / Annually	Staff					X					X		
Lubricate valves and pumps	Bi-Annually	Vendor					X					X		
Clean, Test integrity, Change Washers	Annually	Staff / Vendor									X			
Test pressure	Weekly	Staff												
Plumbing														
Toilets - check for leaks, running water	Annually	Staff						X						
Faucets and shut-offs - check for leaks, drips	Annually	Staff						X						
Boilers/HW Tanks - Inspect, service	Quarterly	Staff / Vendor			X			X			X			X
Pumps - sump pump in basement, confirm operational	Weekly / Monthly	Staff												
Fire Sprinklers														
Inspect, Test Backflow	Annually	Vendor						X						
Sanitary system														
Clean, Lubricate valves and pumps	Bi-Annually	Vendor					X					X		
Replace toilet mechanism	Every 5yrs	Staff / Vendor									X			
Test system integrity	Annually	Staff / Vendor									X			
Storm drain system														
Clean, Lubricate valves and pumps	Bi-Annually	Vendor					X					X		
Test system integrity	Annually	Staff / Vendor									X			
Electrical system														
Tighten connections in transformers and junctions	As Needed	Vendor	Recommended by DHCD's Handbook. **However, if this was never performed, then it should be performed by licensed EC after an infrared test by a Testing Company**											
Clean, Test	As Needed	Vendor												
Fire Alarms														
System (Hardwired) - Clean, Test	Annually	Vendor							X					
Fire Extinguishers - Test, Recharge, Replace (if necessary)	Annually	Vendor							X					

ALL Light Fixtures														
Lighting - clean fixtures, replace lamps as needed	Monthly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Security systems														
Test system	Monthly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Elevator system														
Test lights	Monthly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Mechanical - professional service contract	Quarterly / Annually	Vendor			X			X			X			X
Solid waste disposal system														
Clean compactors, Lubricate machinery	Monthly	Staff												
Lubricate trash chute doors	Bi-Annually	Staff												

Refinish floors	As Needed	Staff												
Ceilings														
Refinish	At Turnover / As Needed	Staff												
Walls														
Refinish	At Turnover / As Needed	Staff												
Recaulk (kitchen and bath)	At Turnover / As Needed	Staff / Vendor												
Kitchen fixtures														
KITCHEN - Clean Range, Microwave, Refrigerator	Annually										X			
GAS STOVE - Valve and line cleaning	Annually	Vendor									X			
UNIT APPLIANCES - clean interior and exterior, vacuum under and behind	Annually	Resident Staff						X						
HVAC fixtures														
Air Source Heat Pumps - Vacuum, Clean Condenser	Annually	Staff										X		
Unit Forced Hot Water - Check for Air locks, Bleed	Annually	Staff / Vendor									X	X		
Unit Electrical Baseboard - Vacuum around fins	Annually	Resident										X		
Unit Forced Hot Air - Vacuum Vents	Annually	Resident										X		
Unit Bathroom Fans - Inspect, Vacuum, Clean covers	Annually	Resident						X						

Machine Preventive Maintenance

TASK	Frequency	By	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Automobile														
Lubricate, Change Filters	Per Manufacturers Recommendations	Vendor										X		
Change tires	Rotate Annually	Vendor										X		
Replace brakes, other fixed life parts	Per Manufacturers Recommendations	Vendor										X		
Change brushes on sweepers	Annually	Vendor										X		
Annual Sticker (Vehicles, Trailers)	Annually (Varies)	Vendor												
Small Engines														
ALL WORK by Service Contract	Per Manufacturers Recommendations	Vendor										X		
OIL - Check Level , Change, Replace Filter	Per Manufacturers Recommendations	Staff										X		
Air Filter - Replace Foam/Paper Air cleaner	Per Manufacturers Recommendations (**OR** Every Season)	Staff										X		
Replace Spark Plug, In-line Fuel Filter	Per Manufacturers Recommendations (**OR** Every 100 Hrs)	Staff										X		
Prep Work Season Start, Season End)	Bi-Annually	Staff			X							X		
Snow Removal and Sanding Equipment	Annually											X		

Weymouth Housing Authority Deferred Maintenance Plan:

Deferred Maintenance is maintenance, upgrades, or repairs that are deferred to a future budget cycle or postponed for some other reason. The purpose of a Deferred Maintenance Plan is to ensure that an identified deficiency is not overlooked when that deficiency cannot be addressed immediately.

Deferred Maintenance should not be confused with Capital Improvement Projects (CIP). Large projects that will fall under our "Formula Funding" are still added to our CIP project list.

Items are added to our Deferred Maintenance List when an existing work order needs to be deferred.

Some of the reasons we defer a deficiency are:

1. **Items Best Completed When Unit is Vacant**
   - Anything noticed during an inspection that can and should wait until the unit is vacant would be added to our Deferred Maintenance Plan and then completed when the unit becomes vacant.
2. **Items that cannot be completed because of the season.**
   - Example: Landscaping, Exterior painting. These would be added to our Deferred Maintenance Plan and completed when the season permits.
3. **Lack of Funding**
   - During annual inspection, it was noticed that the common areas needed to be repainted. Because of a severe winter, the operating budget does not have sufficient funds to complete all the necessary painting at this time. The work order is moved to the "Deferred Maintenance Plan". It will be completed as the operating budget permits.
4. **Efficiency – Items can be grouped together by location, task or trade**
   - Example: A contractor is required for several work orders, they are deferred and scheduled to be completed all at once.
5. **Vacancy Crisis**
   - When the housing authority experiences an unusually high vacancy count, low priority work orders will be moved to the deferred list to allow vacancies to be turned over.
6. **Organizational and Upkeep Tasks**
   - Any tasks that occur infrequently enough that they don't fall under the category of routine work orders. Painting offices or common areas, etc. Any tasks that occur infrequently enough that they don't fall under the category of routine work orders.
   -

Deferred Maintenance plan will include the following information for each item:

Work Order Number, Date Added, Item Description, Site location or Unit Number, Reason Deferred, Materials needed, Target Completion Date, Closed date, and Other Comments.

The Deferred Maintenance List will be reviewed and prioritized weekly.

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.

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 Weymouth Housing Authority operating reserve at the end of fiscal year 2019 was $750,024.00, which is 51.7% of the full reserve amount defined above.

Consolidated Budget (400-1) for all state-aided 667 (Elderly), 200 (family), and 705 (scattered site family) developments owned by Weymouth Housing Authority.

REVENUE

Account Number	Account Class	2019 Approved Revenue Budget	2019 Actual Amounts Received	2020 Approved Revenue Budget	% Change from 2019 Actual to 2020 Budget	2020 Dollars Budgeted per Unit per Month
3110	Shelter Rent - Tenants	$2,333,100.00	$2,213,850.00	$0.00	0%	$0.00
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	$110.00	$85.00	$0.00	0%	$0.00
3611	Interest on Investments - Restricted	$0.00	$0.00	$0.00	0%	$0.00
3690	Other Revenue	$14,000.00	$16,413.00	$0.00	0%	$0.00
3691	Other Revenue - Retained	$0.00	$131,164.00	$0.00	0%	$0.00
3692	Other Revenue - Operating Reserves	$0.00	$0.00	$0.00	0%	$0.00
3693	Other Revenue - Energy Net Meter	$0.00	$0.00	$0.00	0%	$0.00
3801	Operating Subsidy - DHCD (4001)	$524,516.00	$608,922.00	$0.00	0%	$0.00
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	$2,871,726.00	$2,970,434.00	$0.00	0%	$0.00

Consolidated Budget (400-1) for all state-aided 667 (Elderly), 200 (family), and 705 (scattered site family) developments owned by Weymouth Housing Authority.

EXPENSES

Account Number	Account Class	2019 Approved Expense Budget	2019 Actual Amounts Spent	2020 Approved Expense Budget	% Change from 2019 Actual to 2020 Budget.	2020 Dollars Budgeted per Unit per Month
4110	Administrative Salaries	$437,507.00	$437,507.00	$0.00	0%	$0.00
4120	Compensated Absences	$0.00	$13,702.00	$0.00	0%	$0.00
4130	Legal	$64,000.00	$65,560.00	$0.00	0%	$0.00
4140	Members Compensation	$22,129.00	$20,344.00	$0.00	0%	$0.00
4150	Travel & Related Expenses	$4,318.00	$815.00	$0.00	0%	$0.00
4170	Accounting Services	$19,303.00	$18,636.00	$0.00	0%	$0.00
4171	Audit Costs	$8,600.00	$5,546.00	$0.00	0%	$0.00
4180	Penalties & Interest	$0.00	$0.00	$0.00	0%	$0.00
4190	Administrative Other	$75,878.00	$80,744.00	$0.00	0%	$0.00
4191	Tenant Organization	$1,782.00	$1,783.00	$0.00	0%	$0.00
4100	TOTAL ADMINISTRATION	$633,517.00	$644,637.00	$0.00	0%	$0.00
4310	Water	$498,128.00	$551,198.00	$0.00	0%	$0.00
4320	Electricity	$380,093.00	$301,321.00	$0.00	0%	$0.00
4330	Gas	$165,823.00	$166,908.00	$0.00	0%	$0.00
4340	Fuel	$3,107.00	$2,677.00	$0.00	0%	$0.00
4360	Energy Conservation	$0.00	$0.00	$0.00	0%	$0.00
4390	Other	$0.00	$0.00	$0.00	0%	$0.00
4391	Solar Operator Costs	$0.00	$178,500.00	$0.00	0%	$0.00
4392	Net Meter Utility Credit (Negative Amount)	$0.00	$-178,500.00	$0.00	0%	$0.00
4300	TOTAL UTILITIES	$1,047,151.0	$1,022,104.0	$0.00	0%	$0.00

Consolidated Budget (400-1) for all state-aided 667 (Elderly), 200 (family), and 705 (scattered site family) developments owned by Weymouth Housing Authority.

EXPENSES

Account Number	Account Class	2019 Approved Expense Budget	2019 Actual Amounts Spent	2020 Approved Expense Budget	% Change from 2019 Actual to 2020 Budget	2020 Dollars Budgeted per Unit per Month
4410	Maintenance Labor	$377,187.00	$311,483.00	$0.00	0%	$0.00
4420	Materials & Supplies	$131,864.00	$132,192.00	$0.00	0%	$0.00
4430	Contract Costs	$76,016.00	$74,769.00	$0.00	0%	$0.00
4400	TOTAL MAINTENANCE	$585,067.00	$518,444.00	$0.00	0%	$0.00
4510	Insurance	$106,486.00	$102,832.00	$0.00	0%	$0.00
4520	Payment in Lieu of Taxes	$7,488.00	$7,488.00	$0.00	0%	$0.00
4540	Employee Benefits	$369,934.00	$360,638.00	$0.00	0%	$0.00
4541	Employee Benefits - GASB 45	$0.00	$78,110.00	$0.00	0%	$0.00
4542	Pension Expense - GASB 68	$0.00	$0.00	$0.00	0%	$0.00
4570	Collection Loss	$0.00	$69,526.00	$0.00	0%	$0.00
4571	Collection Loss - Fraud/Retroactive	$0.00	$0.00	$0.00	0%	$0.00
4580	Interest Expense	$0.00	$0.00	$0.00	0%	$0.00
4590	Other General Expense	$0.00	$0.00	$0.00	0%	$0.00
4500	TOTAL GENERAL EXPENSES	$483,908.00	$618,594.00	$0.00	0%	$0.00
4610	Extraordinary Maintenance	$163,026.00	$143,382.00	$0.00	0%	$0.00
4611	Equipment Purchases - Non Capitalized	$34,000.00	$30,874.00	$0.00	0%	$0.00
4612	Restricted Reserve Expenditures	$0.00	$0.00	$0.00	0%	$0.00
4715	Housing Assistance Payments	$0.00	$0.00	$0.00	0%	$0.00
4801	Depreciation Expense	$0.00	$1,125,079.00	$0.00	0%	$0.00
4600	TOTAL OTHER EXPENSES	$197,026.00	$1,299,335.00	$0.00	0%	$0.00
4000	TOTAL EXPENSES	$2,946,669.00	$4,103,114.00	$0.00	0%	$0.00

Consolidated Budget (400-1) for all state-aided 667 (Elderly), 200 (family), and 705 (scattered site family) developments owned by Weymouth Housing Authority.

SUMMARY

Account Number	Account Class	2019 Approved Budget	2019 Actual Amounts	2020 Approved Budget	% Change from 2019 Actual to 2020 Budget	2020 Dollars Budgeted per Unit per Month
3000	TOTAL REVENUE	$2,871,726.00	$2,970,434.00	$0.00	0%	$0.00
4000	TOTAL EXPENSES	$2,946,669.00	$4,103,114.00	$0.00	0%	$0.00
2700	NET INCOME (DEFICIT)	$-74,943.00	$-1,132,680.00	$0.00	0%	$0.00
7520	Replacements of Equip. - Capitalized	$39,028.00	$36,307.00	$0.00	0%	$0.00
7540	Betterments & Additions - Capitalized	$0.00	$0.00	$0.00	0%	$0.00
7500	TOTAL NONOPERATING EXPENDITURES	$39,028.00	$36,307.00	$0.00	0%	$0.00
7600	EXCESS REVENUE OVER EXPENSES	$-113,971.00	$-1,168,987.00	$0.00	0%	$0.00

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 properly 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.

Policies

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

Policy	Last Ratified by Board Vote	Notes
*Rent Collection Policy		We will create a new policy for rent collection and will have board approval on August
*Personnel Policy		We are in possession of the personnel policy and will have updated board approval on August 17th
*Capitalization Policy		We are in possessionof the Capitalization Policy and will have updated board approvalon August 17th
*Procurement Policy		We are in possession of Procurement Policy and will have updated board approval on August 17th
*Grievance Policy		We are in possession of Grievance policy and will have updated board approval on August 17th

* 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

AP-2021-Weymouth Housing Authorit-00146 has no current waivers from the regulations of the Department of Housing and Community Development (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.

- Pope Tower & Joseph Crehan LTO Letters
- Pope Tower & Joseph Crehan LTO's Letters
- AP Hearing Comments
- Cover sheet for tenant satisfaction surveys
- Tenant Satisfaction Survey - 667only
- Tenant Satisfaction Survey - 200-705only
- Performance Management Review.

AN EQUAL OPPORTUNITY EMPLOYER

Weymouth Housing Authority

402 Essex Street, Weymouth, MA 02188 Tel. (781) 331-2323 FAX (781) 335-8214 TDD (781) 337-5703

I the undersigned President of the Pope Tower Resident Association have reviewed and approved the Annual and Capital plan of the Weymouth Housing Authority.

Pat Lydon

Patricia A. Lydon

President

Pope Tower Resident Association

I the undersigned President of the Joseph Crehan Resident Association have reviewed and approved the Annual and Capital plan of the Weymouth Housing Authority.

Alan Rizzi

Alan Rizzi

President

Joseph Crehan Resident Association

AN EQUAL OPPORTUNITY EMPLOYER

Weymouth Housing Authority

402 Essex Street, Weymouth, MA 02188 Tel. (781) 331-2323 FAX (781) 335-8214 TDD (781) 337-5703

I the undersigned President of the Pope Tower Resident Association have reviewed and approved the Annual and Capital plan of the Weymouth Housing Authority.

Pat Lydon

Patricia A. Lydon

President

Pope Tower Resident Association

AN EQUAL OPPORTUNITY EMPLOYER

Weymouth Housing Authority

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Alan Rizzi

President

Joseph Crehan Resident Association

Weymouth Housing Authority

We had our Annual Plan Hearing on Sept 21st and there were no Substantial Comments.

Mike Flaherty
Executive Director

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.

WEYMOUTH HOUSING AUTHORITY

Chapter 667 Housing
Summary 2016 - 2017

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

Fall 2016:

- Surveys were sent to 9624 housing units (Chapter 667). 5511 surveys were filled out and returned.

Fall 2017:

- Surveys were sent to 6024 housing units (Chapter 667). 3391 surveys were filled out and returned.
- In the **Weymouth Housing Authority**, surveys were sent to a total of **210** housing units (Chapter 667); **129** surveys were completed.

This report provides some information about how the residents from the **Weymouth Housing Authority** who answered the survey responded. It compares their answers to those from residents in the entire state and to those from medium LHAs in Greater Boston. These medium LHAs in the Greater Boston area include: Belmont, Brockton, Brookline, Canton, Dedham, Milford, Natick, Norwood, Randolph, Stoughton, Wellesley, Weymouth, and Winthrop.

Communication

Residents in Ch. 667 housing were asked about how they interacted with the Weymouth Housing Authority in the last 12 months. The table below shows what percentage of residents said they did each of the following:

	Weymouth Housing Authority	Medium LHAs in Greater Boston *	Entire State
Contacted management about a problem or concern……	76%	80%	77%
Felt they were usually or always treated with courtesy and respect when they contacted management……………....	83%	85%	88%
Saw the Capital Improvement Plan…………	24%	31%	31%
Saw the Operating Budget…………………..	8%	20%	17%
Knew the Executive Director held a meeting with residents...	76%	54%	54%

* Medium LHAs in the Greater Boston area include: Belmont, Brockton, Brookline, Canton, Dedham, Milford, Natick, Norwood, Randolph, Stoughton, Wellesley, Weymouth, and Winthrop.

Services and Programs

59% of the Weymouth Housing Authority residents in Ch. 667 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:

	Weymouth Housing Authority	Medium LHAs in Greater Boston	Entire State
Job training programs………………………	**9%**	**8%**	**6%**
Money management programs (*budgeting, taxes, income building*)……..…….	**12%**	**11%**	**9%**
Children's programs (*tutoring, childcare, afterschool programs*)…..	**2%**	**3%**	**2%**
Health and Medical Services (*visiting nurse, meal programs*)………….........	**40%**	**38%**	**36%**
Adult Education (*GED, ESL, educational counseling*) …………	**10%**	**14%**	**10%**

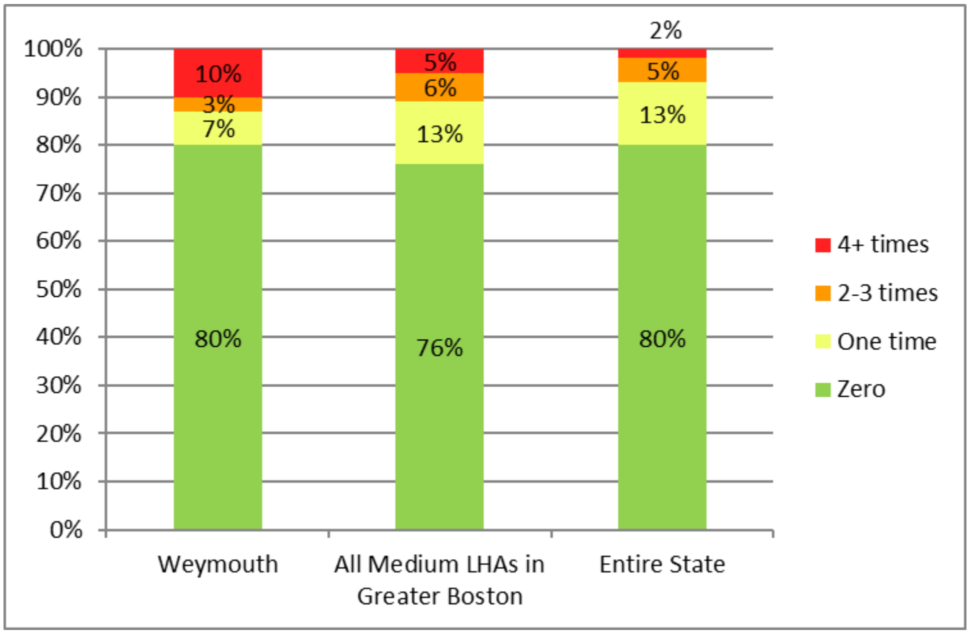
Maintenance and Repair

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

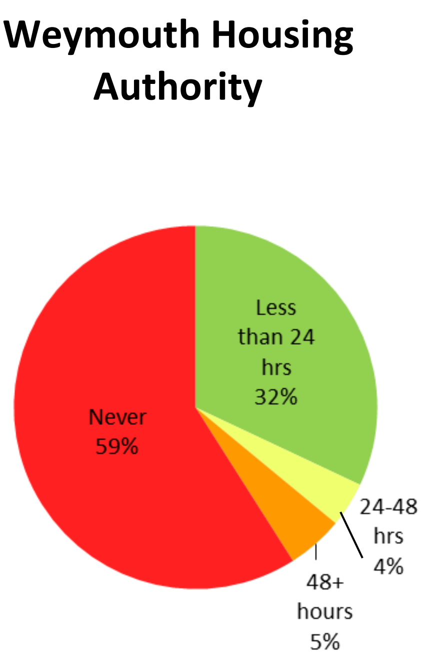
	Weymouth Housing Authority	Medium LHAs in Greater Boston	Entire State
Had a heating problem…………………..…………….	**19%**	**23%**	**20%**
Had a problem with water or plumbing………………….	**51%**	**49%**	**48%**

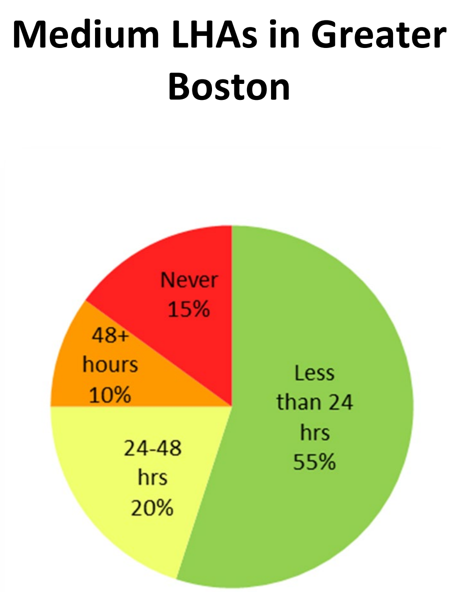
- **Heating Problems**

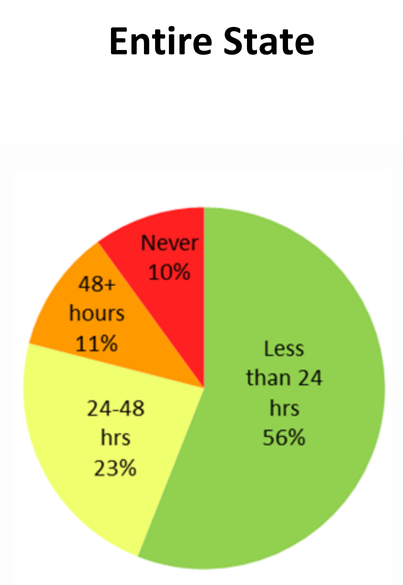
How many times did residents have heating problems?
The charts below shows how many times respondents had heat problems in the last 12 months. The green part of the bars shows what percentage of residents did not have the problem at all. The yellow shows who had the problem one time. The orange shows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



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

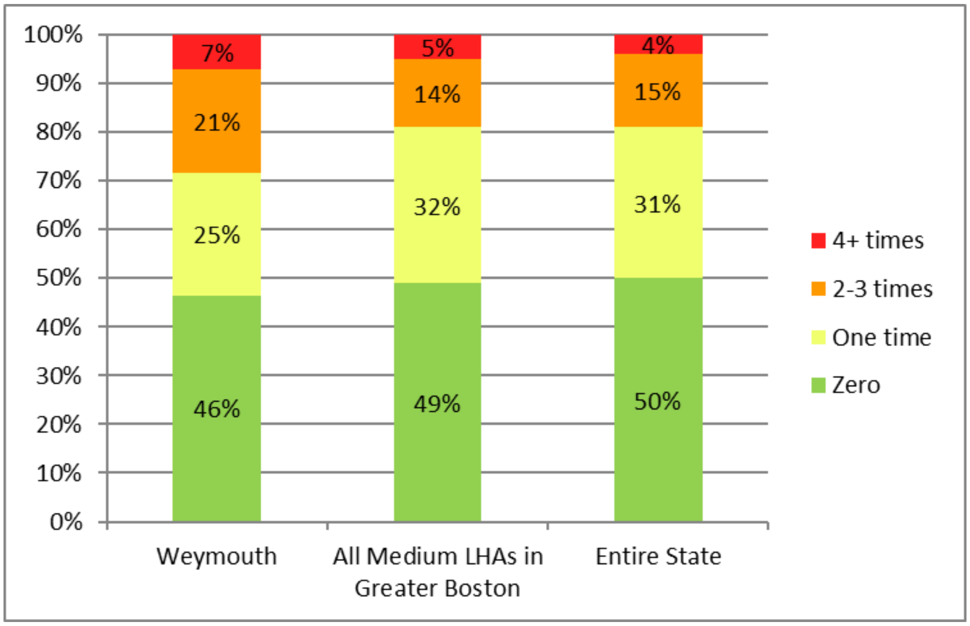




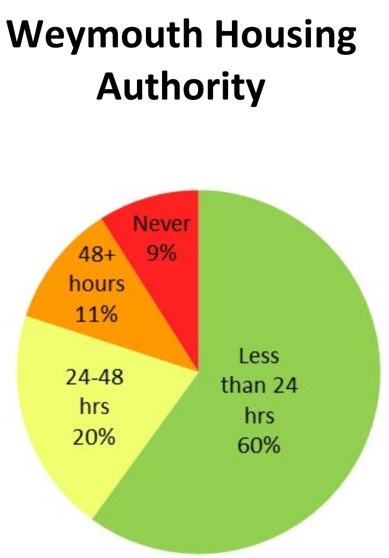


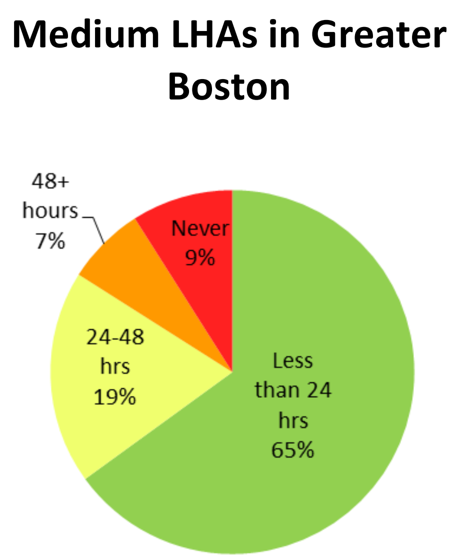
- **Water or Plumbing Problems**

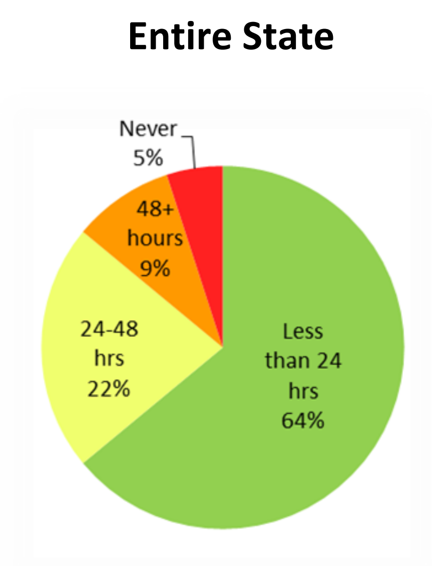
How many times did residents have problems with their water or plumbing?
The charts below shows how many times respondents had water or plumbing problems in the last 12 months. The green part of the bars shows what percentage of residents did not have the problem at all. The yellow shows who had the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



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

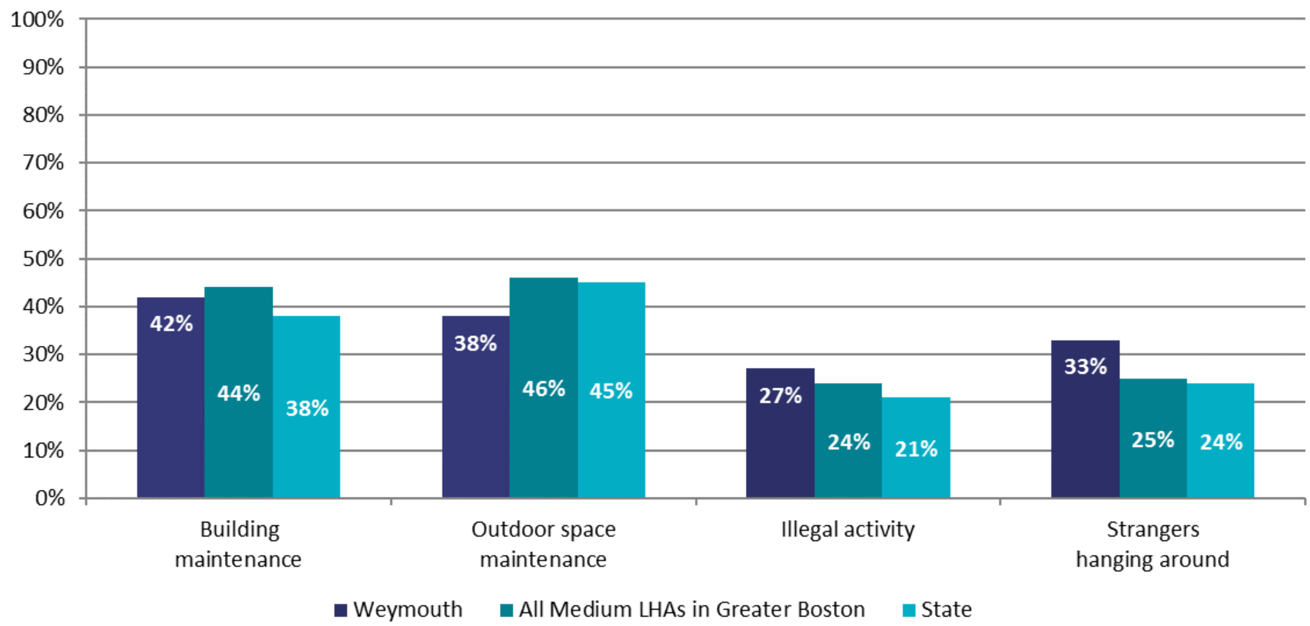






- **What other problems did respondents have?** Respondents were asked how often they had problems with: building maintenance *(such as clean halls and stairways and having lights and elevators that work),* outdoor space maintenance *(such as litter removal and clear walk ways),* illegal activity in 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.

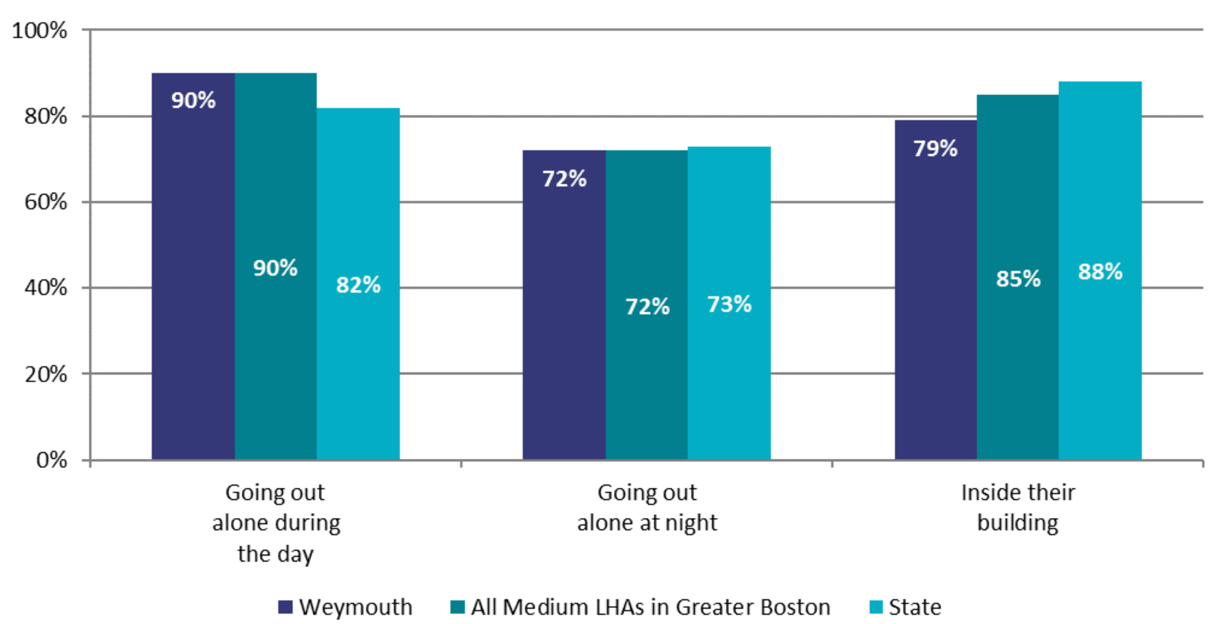
Respondents who "always" or "sometimes" had problems with….



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" ….



WEYMOUTH HOUSING AUTHORITY

Chapter 200 & Chapter 705 Housing
Summary Spring 2016

The Center for Survey Research at the University of Massachusetts Boston sent surveys to 9772 housing units (Chapters 200 and 705) in Massachusetts in the spring of 2016. 3240 residents responded.

Surveys were sent to **182** housing units (Chapters 200 and 705) in the **Weymouth Housing Authority**. **63** surveys were completed.

This report provides some information about how the residents from the **Weymouth Housing Authority** who answered the survey responded. It compares answers to those from the entire state and to those from all medium LHAs in Greater Boston. Medium LHAs in the Greater Boston area include: Belmont, Brockton, Brookline, Canton, Dedham, Milford, Natick, Norwood, Stoughton, Wellesley, Weymouth, and Winthrop.

Communication

Residents in Ch. 200 and Ch. 705 housing were asked about how they interacted with the Weymouth Housing Authority in the last 12 months. The table below shows what percentage of residents said they did each of the following:

	Weymouth Housing Authority	All Medium LHAs in Metro Boston*	Entire State
Contacted management about a problem or concern……	91%	93%	87%
Felt they were usually or always treated with courtesy and respect when they contacted management……………...	67%	74%	76%
Saw the Capital Improvement Plan…………	10%	20%	18%
Saw the Operating Budget…………………..	5%	10%	12%
Knew the Executive Director held a meeting with residents..	35%	27%	21%

* Medium LHAs in the Greater Boston area include: Belmont, Brockton, Brookline, Canton, Dedham, Milford, Natick, Norwood, Stoughton, Wellesley, Weymouth, and Winthrop.

Services and Programs

75% of the Weymouth Housing Authority residents in Ch. 200 and Ch. 705 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:

	Weymouth Housing Authority	All Medium LHAs in Metro Boston	Entire State
Job training programs……………………….	46%	35%	31%
Money management programs (*budgeting, taxes, income building*)……..……..	38%	34%	29%
Children's programs (*tutoring, childcare, afterschool programs*)…..	62%	39%	39%
Health and Medical Services (*visiting nurse, meal programs*)…….….........	33%	27%	26%
Adult Education (*GED, ESL, educational counseling*) …………	41%	27%	29%

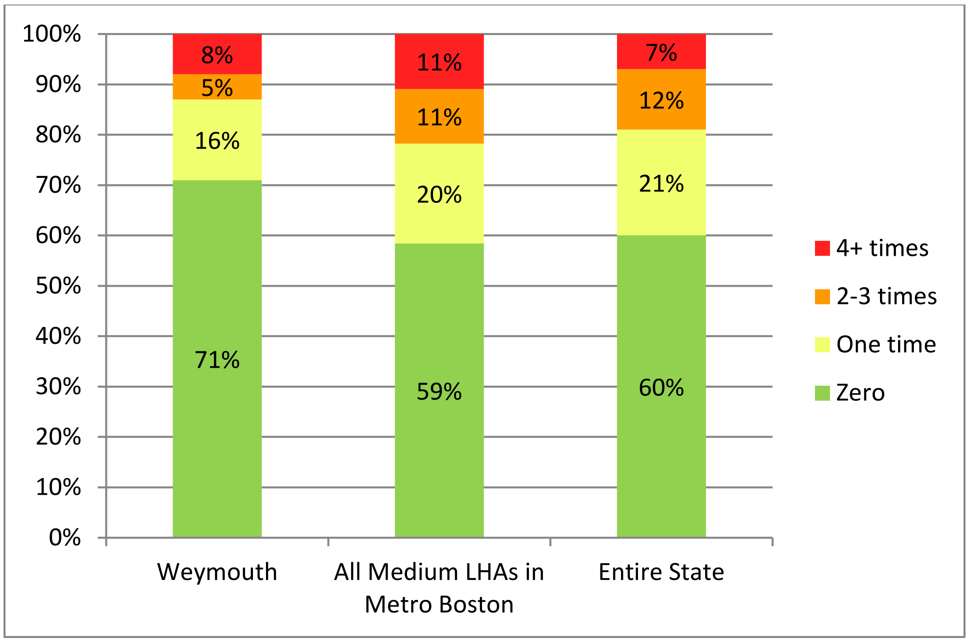
Maintenance and Repair

- **Who had problems?** About a third of respondents had problems with their heat and about three-quarters had plumbing problems in the last 12 months.

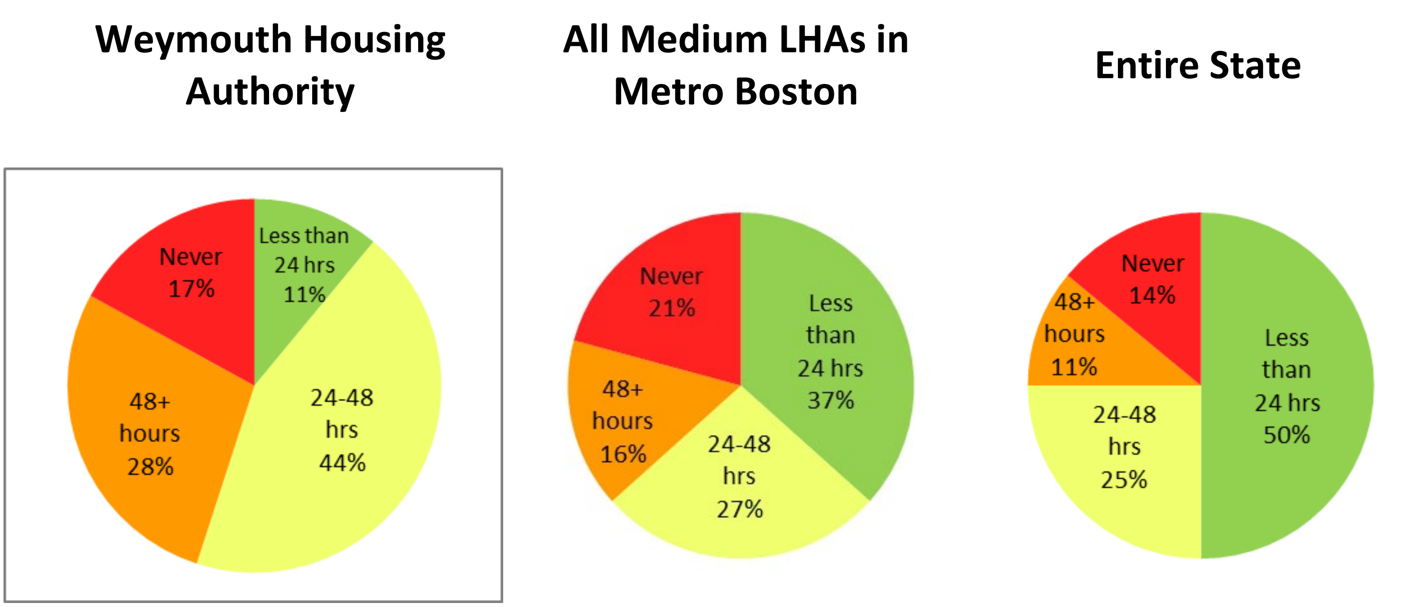
	Weymouth Housing Authority	All Medium LHAs in Metro Boston	Entire State
Had a heating problem…………………..…………….	29%	41%	39%
Had a problem with water or plumbing………………….	78%	65%	57%

- **Heating Problems**

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



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



- **Water or Plumbing Problems**

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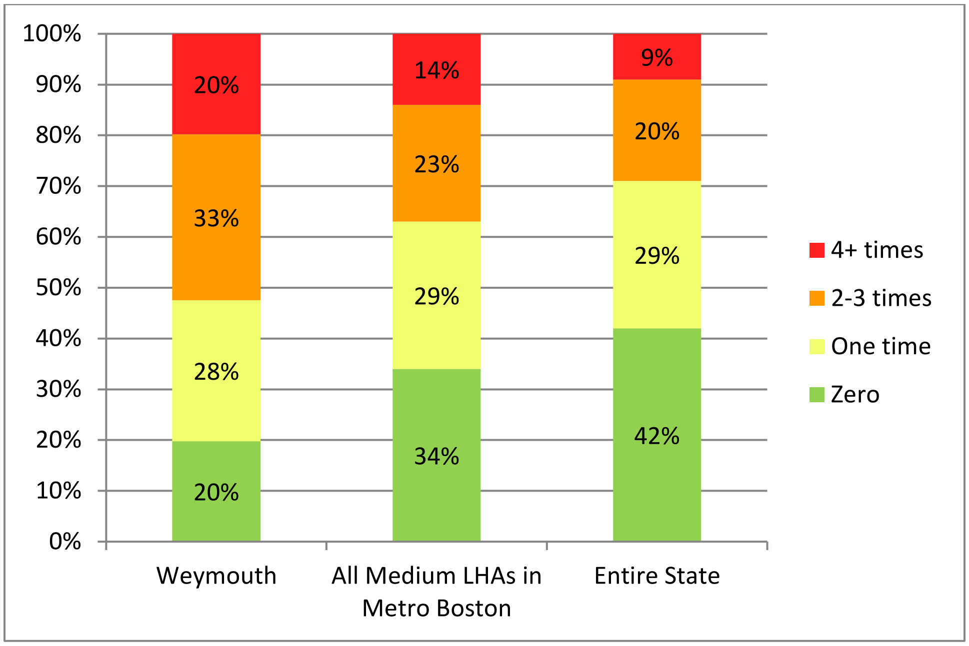
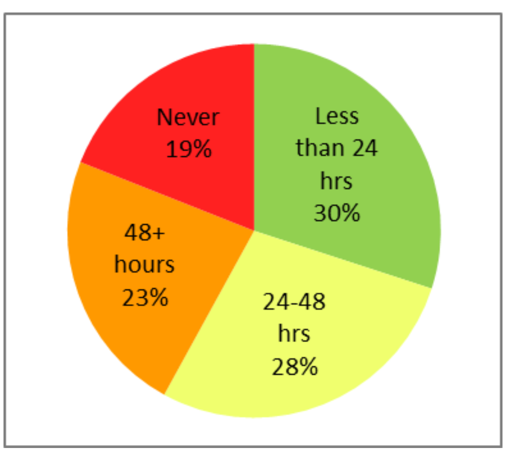
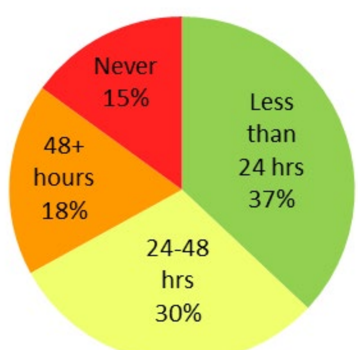


How long did it take to fix the water or plumbing problems? For those respondents who had problems, we asked how long it usually took for the problems to be fixed – less than 24 hours, 24 - 48 hours, more than 48 hours, or never fixed.

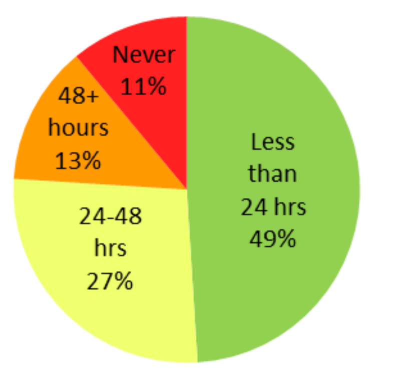
Weymouth Housing Authority



All Medium LHAs in Metro Boston



Entire State



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

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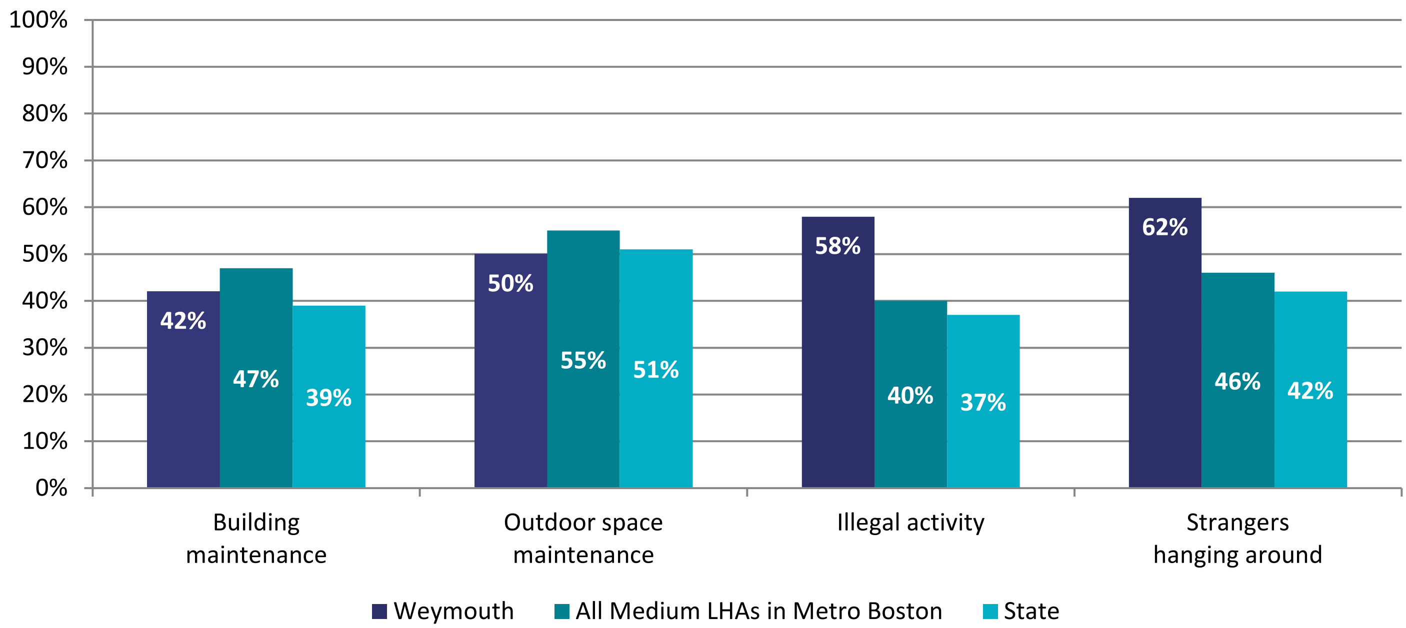

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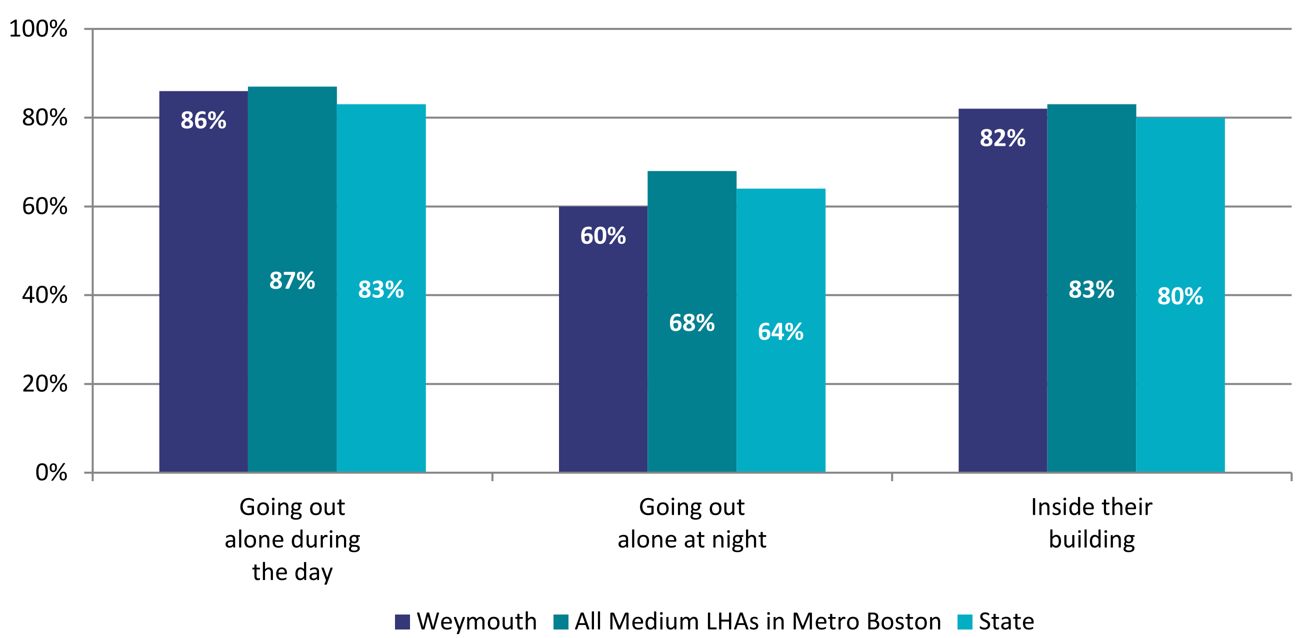

WEYMOUTH HOUSING AUTHORITY

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	Weymouth 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	Not Applicable	No Findings	No Findings
	c.667	**c.705**	**c.200**	**Cumulative**
Tenant Accounts Receivable (TAR)	Corrective Action	Not Applicable	Corrective Action	Corrective Action
Board Member Training	No Findings			
Certifications and Reporting Submissions	Operational Guidance			
	Financial			
Adjusted Net Income	No Findings			
Operating Reserves	No Findings			

Report Date: 5/1/2020

Note: This PMR was conducted remotely in response to the State of Emergency declared on March 10, 2020. See PHN 2020-19.

LHA Weymouth Housing Authority

Occupancy

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

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

Tenant Accounts Receivable (TAR)

Rating All:	Corrective Action
Rating 667:	Corrective Action
Rating 200:	Corrective Action
Rating 705:	Not Applicable

- ☐ Create or update rent collection policy and procedures and submit to DHCD for review, with supporting Board vote.
- ☐ Adhere to your rent collection policy and lease, i.e. sending notices, reminder letters, 14 day notice to quit, 30 day notice etc. Send notices to tenants early and frequently.
- ☐ Increase ways to accept rent payment, i.e. check scanners, lock boxes, electronic debit, autopay, etc.
- ☐ Report to credit bureau when resident has vacated unit with past due rent balance.
- ☐ Consider using small claims court (https://www.mass.gov/info-details/massachusetts-law-about-small-claims)
- ☑ Create written repayment agreements, either in house or court ordered, and ensure they are adhered to.

☑ Other: QE 03/31/2019 and 09/30/2019 TAR certifications were not submitted on time, therefore, this category cannot be reviewed for compliance with the budget or PMR guidelines and criteria. -
Refer to PHN 2018-08 and PHN 2017-13 for additional guidance on this criteria.

Note: This PMR was conducted remotely in response to the State of Emergency declared on March 10, 2020. See PHN 2020-19.

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: QE 06/30/2019 Vacancy certification submitted 28 days late;QE 3/31/2019 TAR report submitted 92 days late; QE 09/30/2019 TAR report submitted 92 days late.**

Adjusted Net Income/Revenue

Rating:	No Findings
	Revenue:
☐	Update and adhere to rent collection policy
☐	Update marketing plan
☐	Update internal policies related to vacant unit turnover
☐	Review rent roll to identify outstanding rents and/or patterns of rent delinquency.
☐	Review operating statements to identify trends in revenue collection such as LHA-wide or development-centered rent issues.
☐	Follow tenant selection best practices to improve vacancy turnover (pulling lists in CHAMP as soon as vacancy occurs and previewing list to prescreen in advance of vacancies as needed)
☐	Set up repayment agreements with tenants as soon as tenant becomes in arrears; do not let large balances accrue.
☐	Make it easier for tenants to pay rent. For example, consider online payments, lockboxes for night time drop-off or extended office hours
☐	Review budget reports with both fee accountant/financial staff and your board to stay on top of revenue trends.
☐	Ensure rent determinations are completed regularly and are in adherence with DHCD policy

Expense:

Salaries

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

Legal

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

Utilities

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

Maintenance

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

Note: This PMR was conducted remotely in response to the State of Emergency declared on March 10, 2020. See PHN 2020-19.

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: No Findings

☐ Ensure you update the board attendance application with the most recent board members, and their term dates.

☐ Ensure each board member has a unique email for the board member training.

☐ Provide computer guidance as needed to help board members complete the training.

☐ Other:

Weymouth

LHA Number 336

PMR Capital Benchmarks for LHA Fiscal Year 2019

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