

Overview and Certification

Boston Housing Authority

Annual Plan for Fiscal Year 2022

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 Boston Housing Authority Administrator or their designee will be expected to review the Plan with the Local Tenant Organizations (LTO's) and Resident Advisory Board (RAB) before the public hearing; 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. Following the hearing and any appropriate revisions to the Annual Plan, the administrator or their designee will submit the plan to DHCD.

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

The Boston Housing Authority's Annual Plan for their 2022 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. BHA Memo DHCD
 - b. Responses to Comments
 - c. Cover sheet for tenant satisfaction surveys
 - d. Tenant Satisfaction Survey - 667only
 - e. Tenant Satisfaction Survey - 200-705only

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
200-07	Family	ARCHDALE 200-07	6	1952	285
705-01	Family	BOWDOIN STREET 705-01	2	1930	13
200-05	Family	FAIRMOUNT 200-05	37	1951	202
200-04	Family	FANEUIL 200-04	10	1950	258
667-01	Elderly	FRANKLIN FIELD 667-1	7	1958	40
667-02	Elderly	FRANKLIN FIELD 667-2	7	1963	64
200-10	Family	GALLIVAN BLVD. 200-10	131	1953	251
705-03	Family	Harwood Street and Winston Rd 705-03	5	1992	10
667-03	Elderly	MONSIGNOR POWERS 667-03	1	1976	69
200-08	Family	ORIENT HEIGHTS 200-08	22	1952	154
705-06	Family	Scattered Sites 705-06	62	0	119
200-12	Family	SOUTH STREET 200-12	10	1953	132
200-01	Family	WEST BROADWAY 200-01	21	1949	485
	Elderly	Elderly units in smaller developments	1		5
	Other	Special Occupancy units	9		52
Total			331		2,139

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.

Boston Housing Authority manages 975 MRVP vouchers.

LHA Central Office

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Local Tenant Organizations

	<u>Date of Recognition by LHA</u>	<u>Date LHA Reviewed Draft AP with LTO</u>
Faneuil Garden Tenant Organization	05/19/2016	11/12/2020
Franklin Field Elderly Task Force	11/30/2017	11/12/2020
Gallivan Boulevard Tenant Associatic	01/01/2015	11/12/2020
Orient Heights Tenant Association	06/09/2015	11/12/2020
West Broadway Task Force	02/03/2020	11/12/2020

Resident Advisory Board

	<u>Date of Recognition by LHA</u>	<u>Date LHA Reviewed Draft AP with RAB</u>
Resident Advisory Board	08/01/2016	11/12/2020

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.	10/23/2020
B.	Advertise the public hearing in public postings.	10/23/2020
C.	Notify all LTO's and RAB, if there is one, of the hearing and provide access to the Proposed Annual Plan.	09/29/2020
D.	Post draft AP for tenant and public viewing.	10/23/2020
E.	Hold quarterly meeting with LTO or RAB to review the draft AP. (Must occur before the LHA Board reviews the Annual Plan.)	11/12/2020
F.	Annual Plan Hearing. Hosted by the LHA Board, with a quorum of members present. (For Boston, the Administrator will host the hearing.)	12/07/2020
G.	Executive Director presents the Annual Plan to the Board.	N/A
H.	Board votes to approve the AP. (For Boston Housing Authority, the Administrator approves and submits the AP.)	01/28/2021

Certification

CERTIFICATION FOR SUBMISSION OF THE ANNUAL PLAN

I, John Kane, Healthy and Supportive Housing Manager of the Boston 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: 01/28/2021

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 (CIP)**Capital Improvement Plan****DHCD Description of CIPs:**

The Capital Improvement Plan (CIP) is a five year plan which identifies capital projects, provides a planning scope, schedule and budget for each capital project and identifies options for financing and implementing the plan. The CIP identifies anticipated spending for each Department of Housing and Community Development (DHCD) fiscal year (July 1 to June 30) based on the project schedules.

Local Housing Authorities (LHAs) receive yearly awards from DHCD (Formula Funding Awards) which they target to their most urgent capital needs in their CIP. They may also receive special awards from DHCD for specific projects which meet specific criteria. Special awards may be given for certain emergency, regulation compliance, energy and water conservation, and other projects. The first three years of the CIP are based on actual awards made to the LHA, while years four and five are based on estimated planning amounts, not actual awards.

LHAs may sometimes secure other sources of funding and assistance that you will note in their CIP, such as: Community Preservation Act (CPA) funding, Community Development Block Grant (CDBG) funding, Local Affordable Housing Trust Funds (AHTF), HOME grants, income from leasing a cell tower on their property, savings from net meter credit contracts with solar developers, utility rebates and contracted work from utility providers, and Sheriff's Department work crews. However, not all of these funding sources are available every year, or in all communities.

The CIP includes the following parts:

- A table of available funding sources and amounts
- A list of planned capital projects showing spending per fiscal year
- A table showing special awards and other funding for targeted projects, if any, which supplements Formula Funding awarded to the LHA
- A 'narrative' with a variety of additional information.

Capital Improvement Plan (CIP)**Aggregate Funding Available for Projects in the First Three Years of the CIP:**

Category of Funds	Allocation	Planned Spending	Description
Balance of Formula Funding (FF)	\$13,252,086.64		Total of all FF awards minus prior FF spending
LHA Emergency Reserve	\$1,987,813.00		Amount to reserve for emergencies
Net FF Funds (First 3 Years of the CIP)	\$11,264,273.64	\$10,992,809.70	Funds to plan & amount actually planned in the first 3 years of the CIP
ADA Set-aside	\$98,533.39	\$98,591.33	Accessibility projects
DMH Set-aside	\$22,457.61	\$22,050.00	Dept. of Mental Health facility
DDS Set-aside	\$475,074.43	\$474,750.00	Dept. of Developmental Services facility
Unrestricted Formula Funding (FF)	\$10,668,208.22	\$10,397,418.37	Funds awarded by DHCD to be used on projects selected by the LHA and approved by DHCD.
Special DHCD Funding	\$976,034.50	\$976,034.50	Targeted awards from DHCD
Community Development Block Grant (CDBG) Funds	\$0.00	\$0.00	Federal funds awarded by a city or town for specific projects.
Community Preservation Act (CPA) Funds	\$0.00	\$0.00	Community Preservation Act funds awarded by a city or town for specific projects.
Operating Reserve(OR) Funds	\$20,043,575.71	\$20,043,575.71	Funds from the LHA's operating budget.
Other Funds	\$87,377,014.61	\$87,377,014.61	Funds other than those in the above categories. See explanation below.
Total funds and planned spending	\$119,660,898.4	\$119,389,434.53	Total of all anticipated funding available for planned projects and the total of planned spending.

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

Capital Improvement Plan (CIP)

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
035190	98 Bond: W. Broadway Fire Alarm (BHA Job No. 00-055)	WEST BROADWAY 200-01	\$985,490	\$104,555	\$11,510	\$33,525	\$0	\$0	\$0	\$0
035308	Faneuil Decentralization Project BHA#0972-01	FANEUIL\ FANEUIL	\$603,192	\$0	\$0	\$0	\$0	\$0	\$0	\$0
035330	FF: Wire Mold - Archdale	ARCHDALE 200-07	\$551,933	\$230,740	\$21,567	\$28,571	\$0	\$0	\$0	\$0
035349	FF: Scattered site building envelope - 70 Norwell St & 564 Blue Hill	Scattered Sites 705-06	\$1,124,111	\$239,198	\$3,800	\$849,404	\$31,711	\$0	\$0	\$0
035365	FF: building envelope - 49 Tremont St. Charlestown	Scattered Sites 705-06	\$346,446	\$12,065	\$0	\$319,383	\$14,999	\$0	\$0	\$0
035387	Phase II Scattered Site Roof Replacment	Scattered Sites 705-06	\$521,768	\$510,358	\$0	\$0	\$0	\$0	\$0	\$0
035388	FF: Security Cameras at West Broadway	WEST BROADWAY 200-01	\$702,277	\$690,386	\$0	\$1,692	\$0	\$0	\$0	\$0
035396	FF: Transformer Replacement	WEST BROADWAY 200-01	\$208,199	\$52,066	\$0	\$149,466	\$6,667	\$0	\$0	\$0
035400	Orient Heights Phase II	ORIENT HEIGHTS 200-08	\$22,651,330	\$700,000	\$50,000	\$0	\$0	\$0	\$2,313	\$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
035411	Auth-Wide: Stair Hall Improvements (Phase I)	SOUTH STREET 200-12	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
035413	Plumbing Repairs & Unit Restoration - 0 Cliffmont - BHA #1674-02	Zero Cliffmont St., Roslindale	\$194,666	\$22,705	\$0	\$171,961	\$0	\$0	\$0	\$0
035414	FF: Security and Public Safety - Cameras	FANEUIL 200-04	\$768,123	\$607,990	\$19,455	\$29,443	\$0	\$0	\$0	\$0
035415	FF: Electrical Distribution System Upgrade	WEST BROADWAY 200-01	\$565,000	\$0	\$0	\$0	\$0	\$0	\$159,149	\$405,852
035416	FF: Heating Control Valves	FANEUIL 200-04	\$70,000	\$31,785	\$0	\$0	\$38,215	\$0	\$0	\$0
035417	FF: Conversion to Gas Service for Boiler Room - Phase I	FANEUIL 200-04	\$187,500	\$0	\$0	\$0	\$180,900	\$6,600	\$0	\$0
035419	FF: Underground Storage Tank Removal - Phase I	FANEUIL 200-04	\$312,500	\$0	\$0	\$0	\$0	\$66,719	\$245,782	\$0
035420	FF: Unit Exterior Doors and Hardware	GALLIVAN BLVD. 200-10	\$29,266	\$0	\$0	\$0	\$0	\$11,075	\$18,192	\$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
035424	FF: SUST-CSI 2019: Building Envelope and Mechanicals - Msgr Powers Phase I	MONSIGNOR POWERS\ MONSIGNOR POWERS	\$4,424,200	\$293,681	\$17,500	\$358,594	\$2,079,244	\$1,849,830	\$0	\$0
035426	FF: Building Envelope - Side Wall at Abutters	BOWDOIN STREET 705-01	\$253,515	\$130,745	\$59,563	\$68,033	\$0	\$0	\$0	\$0
035427	FF: Authority Wide New Building Envelope	Scattered Sites 705-06	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
035429	Auth-Wide: Roof Replacement (Phase I)	Multiple Developments	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
035430	Domestic Hot Water Upgrades - 2019/20 - Faneuil	FANEUIL 200-04	\$776,134	\$28,260	\$42,729	\$286,202	\$418,945	\$0	\$0	\$0
035432	Security and Public Safety - Cameras	FANEUIL 200-04	\$632,850	\$68,560	\$10,810	\$367,413	\$196,877	\$0	\$0	\$0
035435	Misc. Site Improvements	FANEUIL 200-04	\$418,880	\$24,511	\$6,319	\$150,109	\$237,943	\$0	\$0	\$0
035436	Side Walk Repairs - Phase II	SOUTH STREET 200-12	\$42,375	\$0	\$0	\$0	\$42,375	\$0	\$0	\$0
035438	H&S FY20: Replace Court Yard and Replace 15 of Entry Retaining Wall	Scattered Sites 705-06	\$56,312	\$0	\$13,615	\$43,743	\$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
035439	H&S FY20: Tub cuts		\$45,950	\$9,809	\$20,515	\$31,642	\$0	\$0	\$0	\$0
035440	H&S FY20: Replace Rear Egress Decks, Stairs and Handrails	Scattered Sites 705-06	\$97,300	\$0	\$0	\$97,300	\$0	\$0	\$0	\$0
035441	H&S FY20: Building Envelope Repairs - roofing and siding	Harwood Street and Winston Rd 705-03	\$50,000	\$0	\$0	\$50,000	\$0	\$0	\$0	\$0
035442	H&S FY20: extend boiler room vent pipe to roof line		\$327,660	\$0	\$10,080	\$319,539	\$0	\$0	\$0	\$0
035443	H&S FY20: Building Envelope [Rear Wall Masonry Repointing]		\$49,155	\$0	\$46,200	\$49,155	\$0	\$0	\$0	\$0
035444	DDS Door widening and ramps -Cliffmont	Cliffmont 689-04	\$155,000	\$0	\$0	\$0	\$40,986	\$114,015	\$0	\$0
035445	DDS door widening and ramps - 49 Tremont St. Charlestown	CHARLESTOWN	\$155,000	\$0	\$0	\$0	\$155,000	\$0	\$0	\$0
035446	As Built Drawings for 10 Scattered Sites	Scattered Sites 705-06	\$71,900	\$0	\$0	\$0	\$71,900	\$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
035447	Structural Restoration and Building Renovations	Scattered Sites 705-06	\$140,000	\$0	\$0	\$0	\$37,020	\$102,981	\$0	\$0
035448	Authority Wide Comprehensive Roofing Survey	GALLIVAN BLVD. 200-10	\$99,500	\$0	\$0	\$0	\$0	\$0	\$0	\$0
035449	Authority Wide Comprehensive Building Envelope Survey	GALLIVAN BLVD. 200-10	\$108,850	\$0	\$58,800	\$0	\$0	\$0	\$0	\$0
035450	Authority Wide Comprehensive Stair Hall Survey	GALLIVAN BLVD. 200-10	\$70,000	\$0	\$0	\$0	\$70,000	\$0	\$0	\$0
035451	Authority Wide Comprehensive Mechanical Systems Survey	GALLIVAN BLVD. 200-10	\$80,000	\$0	\$0	\$52,000	\$28,000	\$0	\$0	\$0
035452	Authority Wide Comprehensive Deck, Stairs Survey	GALLIVAN BLVD. 200-10	\$60,000	\$0	\$0	\$39,000	\$21,000	\$0	\$0	\$0
035453	Authority Wide Comprehensive Life and Safety Survey	GALLIVAN BLVD. 200-10	\$71,000	\$0	\$0	\$46,150	\$24,850	\$0	\$0	\$0
035454	Authority Wide Comprehensive Site Survey	GALLIVAN BLVD. 200-10	\$60,000	\$0	\$0	\$39,000	\$21,000	\$0	\$0	\$0
035457	Orient Heights Phase III	ORIENT HEIGHTS 200-08	\$60,646,220	\$0	\$0	\$0	\$0	\$0	\$0	\$0

Capital Improvement Plan (CIP)

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

Cap Hub Project Number	Project Name	Development(s)	Total Cost	Amount Spent Prior to Plan	fy2021 Spent	fy2021 Planned	fy2022	fy2023	fy2024	fy2025
035458	Building Envelope Improvements - 36, 38, 40 Woodcliff	Scattered Sites 705-06	\$96,434	\$0	\$0	\$0	\$0	\$31,331	\$65,103	\$0
035460	Demolish and Rebuild Rear Egress Deck at 1492 Tremont Street	FAIRMOUNT 200-05	\$79,000	\$0	\$0	\$0	\$79,000	\$0	\$0	\$0
035461	Installation of a New PVC Sanitary Drain System at Bldgs 3&4 at Archdale	ARCHDALE 200-07	\$190,385	\$0	\$17,650	\$76,948	\$95,787	\$0	\$0	\$0
035462	Installation of a Security Cameras	ORIENT HEIGHTS 200-08	\$18,422	\$18,422	\$0	\$0	\$0	\$0	\$0	\$0
035463	Building Envelope Restoration at 21 Maryland Street	Scattered Sites 705-06	\$210,970	\$0	\$0	\$33,131	\$177,840	\$0	\$0	\$0
035464	UST Internal Cleaning (2) 15,000 Tanks	FANEUIL 200-04	\$18,168	\$0	\$18,144	\$25	\$0	\$0	\$0	\$0
•	Unit Modernization - Kitchens and Bath - Scattered Sites	WINSTON ROAD 167-02	\$22,050	\$0	\$0	\$0	\$0	\$22,050	\$0	\$0
•	200-1, 200-4 Window Repair and Replacement	WEST BROADWAY 200-01	\$625,152	\$0	\$0	\$0	\$0	\$0	\$29,518	\$595,635

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
•	As Needed Authority-wide Roof Repair or Replacement - Phase II	FANEUIL 200-04	\$200,000	\$0	\$0	\$0	\$0	\$200,000	\$0	\$0
•	As Needed Authority-wide Building Envelope Repairs - Phase II	FANEUIL 200-04	\$200,000	\$0	\$0	\$0	\$0	\$200,000	\$0	\$0
•	Window Repair and Replacement	200 Devs	\$734,132	\$0	\$0	\$0	\$14,491	\$204,406	\$515,236	\$0
•	As Needed Authority-wide Roof Repair or Replacement - Phase III	FAIRMOUNT 200-05	\$156,250	\$0	\$0	\$0	\$0	\$0	\$156,250	\$0
•	As Needed Authority-wide Building Envelope Repairs - Phase III	FAIRMOUNT 200-05	\$156,250	\$0	\$0	\$0	\$0	\$0	\$156,250	\$0
•	As Needed Authority-wide Building Envelope Repairs - Phase II	ARCHDALE 200-07	\$225,000	\$0	\$0	\$0	\$0	\$225,000	\$0	\$0
•	Stair Hall Improvements - Phase II	ARCHDALE 200-07	\$225,000	\$0	\$0	\$0	\$0	\$225,000	\$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
•	As Needed Authority-wide Roof Repair or Replacement - Phase III	GALLIVAN BLVD. 200-10	\$200,000	\$0	\$0	\$0	\$0	\$0	\$200,000	\$0
•	As Needed Authority-wide Building Envelope Repairs - Phase III	GALLIVAN BLVD. 200-10	\$200,000	\$0	\$0	\$0	\$0	\$0	\$200,000	\$0
•	Stairhall Improvements - Phase III	GALLIVAN BLVD. 200-10	\$200,000	\$0	\$0	\$0	\$0	\$200,000	\$0	\$0
•	Authority Wide - Life and Safety	ARCHDALE 200-07	\$375,000	\$0	\$0	\$0	\$0	\$149,510	\$225,491	\$0
•	667 Window Repair and Replacement	FRANKLIN FIELD\ MONSIGNOR POWERS	\$145,305	\$0	\$0	\$0	\$0	\$0	\$145,305	\$0
•	Authority Wide - Mechanical systems	FRANKLIN FIELD 667-1	\$375,000	\$0	\$0	\$0	\$0	\$149,510	\$225,491	\$0
•	As Needed Authority-wide Roof Repair or Replacement - Phase II	FRANKLIN FIELD 667-1	\$125,000	\$0	\$0	\$0	\$0	\$125,000	\$0	\$0
•	As Needed Authority-wide Building Envelope Repairs - Phase II	FRANKLIN FIELD 667-1	\$50,000	\$0	\$0	\$0	\$0	\$0	\$50,000	\$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
•	Remote Boiler Shutdown Switches	FRANKLIN FIELD 667-1	\$13,398	\$0	\$0	\$13,398	\$0	\$0	\$0	\$0
•	New Heating Distribution Lines	FRANKLIN FIELD 667-2	\$224,591	\$0	\$0	\$0	\$0	\$0	\$224,591	\$0
•	As Needed Authority-wide Roof Repair or Replacement - Phase II	FRANKLIN FIELD 667-2	\$125,000	\$0	\$0	\$0	\$0	\$0	\$125,000	\$0
•	As Needed Authority-wide Building Envelope Repairs - Phase II	FRANKLIN FIELD 667-2	\$50,000	\$0	\$0	\$0	\$0	\$0	\$50,000	\$0
•	Stairhall Improvements - Phase II	FRANKLIN FIELD 667-2	\$40,000	\$0	\$0	\$0	\$0	\$0	\$40,000	\$0
•	Central Stores Relocation Project	West Broadway - DDS / DMH 689-03	\$2,613,725	\$0	\$0	\$0	\$0	\$0	\$0	\$0
•	Fire Alarm Panel Replacment	Cliffmont 689-04	\$9,020	\$0	\$0	\$9,020	\$0	\$0	\$0	\$0
•	As Needed Authority-wide Roof Repair or Replacement	BOWDOIN STREET 705-01	\$84,750	\$0	\$0	\$0	\$0	\$0	\$0	\$84,750
•	As Needed Authority-wide Roof Repair or Replacement	BOWDOIN STREET 705-01	\$106,492	\$0	\$0	\$0	\$0	\$0	\$0	\$106,492

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
•	As Needed Authority-wide Roof Repair or Replacement	BOWDOIN STREET 705-01	\$84,750	\$0	\$0	\$0	\$0	\$0	\$0	\$84,750
•	As Needed Authority-wide Roof Repair or Replacement	Scattered Sites 705-06	\$152,550	\$0	\$0	\$0	\$0	\$0	\$0	\$152,550
•	Multi Phase Siding and Window Repairs at Misc. Scattered Sites	Scattered Sites 705-06	\$750,000	\$0	\$0	\$0	\$0	\$0	\$77,915	\$672,086
•	As Needed Authority-wide Roof Repair or Replacement	Scattered Sites 705-06	\$113,000	\$0	\$0	\$0	\$0	\$0	\$0	\$113,000
•	As Needed Authority-wide Roof Repair or Replacement	Scattered Sites 705-06	\$84,750	\$0	\$0	\$0	\$0	\$0	\$0	\$84,750
TOTALS			\$107,993,137	\$3,775,830	\$428,254	\$3,713,838	\$4,084,745	\$3,883,024	\$2,911,581	\$2,299,863

Capital Improvement Plan (CIP)

FUNDS IN ADDITION TO ANNUAL FORMULA FUNDING AWARD

Cap Hub Project Number	Project Name	DHCD Special Award Comment	Special DHCD Awards				Other Funding			
			Emergency Reserve	Compliance Reserve	Sustain-ability	Special Awards	CDBG	CPA	Operating Reserve	Other Funds
035190	98 Bond: W. Broadway Fire Alarm (BHA Job No. 00-055)		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$741,818
035308	Faneuil Decentralization Project BHA#0972-01		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$603,192
035314	HILAPPFY14 + CAR: 200-8 Phase one Orient Hts Redevelop 120 units	HILAPPFY14 + CAR: 200-8 Phase one Orient Hts Redevelop 120 units	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$42,725,000
035330	FF: Wire Mold - Archdale		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$271,056
035400	Orient Heights Phase II	Orient Heights Phase II Redevelopment	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$21,851,330
035424	FF: SUST-CSI 2019: Building Envelope and Mechanicals - Msgr Powers Phase I	Variable refrigerant flow system, hotw system, roof and insulation	\$0	\$0	\$750,000	\$0	\$0	\$0	\$0	\$-174,647
035438	H&S FY20: Replace Court Yard and Replace 15 of Entry Retaining Wall	H&S FY20: Replace Court Yard and Replace 15 of Entry Retaining Wall	\$0	\$0	\$0	\$49,833	\$0	\$0	\$0	\$0

Capital Improvement Plan (CIP)

FUNDS IN ADDITION TO ANNUAL FORMULA FUNDING AWARD

Cap Hub Project Number	Project Name	DHCD Special Award Comment	Special DHCD Awards				Other Funding			
			Emergency Reserve	Compliance Reserve	Sustain- ability	Special Awards	CDBG	CPA	Operating Reserve	Other Funds
035439	H&S FY20: Tub cuts	H&S FY20: Tub cuts	\$0	\$0	\$0	\$43,053	\$0	\$0	\$0	\$0
035440	H&S FY20: Replace Rear Egress Decks, Stairs and Handrails	H&S FY20: Replace Rear Egress Decks, Stairs and Handrails	\$0	\$0	\$0	\$43,053	\$0	\$0	\$0	\$0
035441	H&S FY20: Building Envelope Repairs - roofing and siding	H&S FY20: Building Envelope Repairs - roofing and siding	\$0	\$0	\$0	\$50,000	\$0	\$0	\$0	\$0
035442	H&S FY20: extend boiler room vent pipe to roof line	H&S FY20: extend boiler room vent pipe to roof line	\$0	\$0	\$0	\$48,025	\$0	\$0	\$0	\$0
035443	H&S FY20: Building Envelope [Rear Wall Masonry Repointing]	H&S FY20: Building Envelope [Rear Wall Masonry Repointing]	\$0	\$0	\$0	\$49,155	\$0	\$0	\$0	\$0
035457	Orient Heights Phase III		\$0	\$0	\$0	\$0	\$0	\$0	\$20,046,220	\$40,600,000
•	Central Stores Relocation Project		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$2,613,725
TOTALS			\$0	\$0	\$750,000	\$283,119	\$0	\$0	\$20,046,220	\$109,231,473

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.

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

- Projected spending on projects currently in bidding or construction exceeds Cap Share in one or more years of the CIP.

Boston has projects that are all in the millions of dollars, which makes it nearly impossible to correctly spread them over the individual CAP Share years.

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.

Boston Housing Authority has not requested additional funding.

3. Overall goals of the Housing Authority's CIP

The BHA's overall goal, involving all departments, is to keep as many of the buildings and units on-line as possible. New this year is a comprehensive modernization of our Elderly development at Monsignor Powers, to address Building Envelope, roofing, heating and lighting, and exhaust systems (kitchens and baths). The BHA's CIP is focused on security and personal safety projects at some of our most at-risk properties. We are also introducing an Authority-wide concept for roofing, building envelope, and stair halls projects (vs. all roofs at one development at a time, for example), for which we are conducting Authority-wide surveys to determine the developments that need immediate attention, and will address them as Phase 1, Phase 2, etc.

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:

The new Monsignor Powers comprehensive project has moved to the forefront, which necessitated delaying some of our other project. Also, all individual projects of Monsignor Powers have been absorbed into this project, so they were removed from the plan.

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 08/27/2020.

7. Capital Planning System (CPS) updates

Boston Housing Authority has not completed CPS updates. Our plan going forward is as follows:

Projects completed have been archived, but not all inventory has been updated.

8. Project priorities

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

9. High priority deficiencies

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

See attached.

10. Accessibility

We have identified the following accessibility deficiencies in our portfolio:

We are not yet at 5% of portfolio being ADA compliant units.

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

We are including a fully-compliant ADA unit in the Monsignor Powers comprehensive project (FISH 035440). We are also installing an ADA ramp at our DDS development (FISH 035413).

11. Special needs development

Boston Housing Authority has one or more special needs (167 or 689 programs) development. We have completed the service provider input process according to the required procedures detailed in the lease agreement and held an annual meeting with the service provider staff at all special needs developments as of 06/30/2020.

12. Energy and water consumption

Our 12 most recent monthly energy reports are for months 9/2004 to 8/2005.

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

No developments exceed threshold values.

Boston uses an alternative method for tracking energy usage.

13. Energy or water saving initiatives

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

14. Vacancy rate

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

2% c. 667 (DHCD Goal 2%)

7% c. 200 (DHCD Goal 2%)

3% c. 705 (DHCD Goal 2%)

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

Our projects are large scale capital improvement projects; any vacancies due to unit improvement on turnover are the responsibility of the site managers.

15. Vacancies

Boston 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.
 - o Inspections are visual and operational examinations of parts of our property to determine their condition.
 - o All dwelling units, buildings and sites must be inspected at least annually.
 - o **Goal: Inspection-generated work orders are completed within 30 calendar days from the date of inspection, OR if cannot be completed within 30 calendar days, are added to the Deferred Maintenance Plan or the Capital Improvement Plan in the case of qualifying capital repairs (unless health/safety issue).**
- V. **Requested Maintenance** - Work which is requested by residents or others, does not fall into any category above, and should be accomplished as time and funds are available.
 - Requests from residents or others for maintenance work which does not fall into one of the other categories has the lowest priority for staff assignment.
 - **Goal: Requested work orders are completed in 14 calendar days from the date of tenant request or if not completed within that timeframe (and not a health or safety issue), the task is added and completed in a timely manner as a part of the Deferred Maintenance Plan and/or CIP.**

Emergency Request System

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

METHOD	CONTACT INFO.	TIMES
Call LHA at Phone Number	617-988-HELP (4357)	24 Hr. Work Order center
Other	617-988-HELP (4357)	24 Hr. Work Order center

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 Boston 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
Any other maintenance condition causing a health/safety hazard

Normal Maintenance Request Process

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

METHOD	CONTACT INFO.	TIMES
Text Phone Number		
Call Answering Service		
Call Housing Authority Office		
Submit Online at Website		
Email to Following Email		
Other	617-988-HELP (4357)	24 Hr. Work Order center

In addition to calling the 24-hour BHA work order line, residents may also report maintenance issues directly to their management office, during business hours. Management staff will create work orders for any reported maintenance issues.

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 authority's work order system was cancelled due to the COVID-19 emergency.

Work order classification used:

Emergency	
Vacancy	
Preventative Maintenance	
Routine	
Inspections	
Tenant Requests	

B. We do not track deferred maintenance tasks in our work order system.

C. Our work order process includes the following steps:

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

Maintenance Plan Narrative

Following are Boston 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 Boston Housing Authority has a comprehensive Standard Operating Procedure (SOP) that includes all facets of the maintenance operation at the properties. It includes detailed information on work rules, standards and priorities, the work order system, inspections of buildings, units and common areas, the handling of emergencies, preventive maintenance planning, and quality control.

The SOP was put together by a group of BHA maintenance superintendents, managers and other staff in 2001, and has been revised regularly since then. BHA views the SOP as a "Work-In-Progress" as it is continually evaluated to include updated requirements and to always reflect proven best practices throughout the agency so that all maintenance and management staff have access to the best information, regardless of location.

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

The BHA is currently implementing new software to enhance the efficiency of the annual inspections. The new process will utilize hand held tablets with UPCS inspection software. This will enable staff to spend less time working with the current paper-driven inspection process, and remove some of the impediments to conducting better, more consistent inspections of units and common areas across the portfolio. It will also ease the generation and tracking of inspection-based work orders as the results will always be clearly legible and the deficiencies will be consistently described and easily identified, with the ability to add notes and photographs when necessary. Several unit inspections have been conducted with the software and results have been positive from all staff involved. BHA anticipates doing 100% of annual inspections on the tablets by the end of the current fiscal year.

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

The BHA has committed to the implementation of new work order software to enhance the efficiency of the maintenance operation. This will reduce the reliance on printed work orders and allow the agency to move away from the current paper-driven process which can lead to the creation of duplicate work orders which must be periodically reconciled. The new software will allow supervisors to more easily assign, track, and perform better quality control on all types of work, as they will be able to spend less time managing and reviewing the paperwork and more time supervising jobs and conducting follow-up inspections. These efficiencies should lead to opportunities for the agency to improve performance monitoring, with the availability of better real-time information. This should lead to better tracking, quality control, and improved work order completion time.

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	\$6,284,670.00	\$100,000.00
Last Fiscal Year Actual Spending	\$6,158,000.00	\$35,888.00
Current Fiscal Year Budget	\$0.00	\$0.00

E. Unit Turnover Summary

# Turnovers Last Fiscal Year	82
Average time from date vacated to make Unit "Maintenance Ready"	65 days
Average time from date vacated to lease up of unit	102 days

Attachments

These items have been prepared by the Boston 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.

ENANCE SCHEDULE & report FORM (ART 1 - BUILDING SYSTEMS)REVENTIVE MAINTENANCE SCHEDULE & report FORM (ART 1 - BI

Dev #	Develoment Name	Use P to denote when Task is Planned
501	WEST BROADWAY	

Refer to Chater in SO Manual	reventive Maintenance on Building Systems which includes: Inspecting - Testing - Cleaning - Servicing - Reair - Relacement													
	Item:	Schd	Ar	May	June	July	Aug	Se	Oct	Nov	Dec	Jan	Feb	Mar
26 - Electrical	Electrical Distribution Inspection	A								P				
	Battery Lights, visual Inspect.	W	Daily/Weekly Laborers/JGs/RC should note any obvious breakage and report immediately											
	Battery Lights Testing	M	P	P	P	P	P	P	P	P	P	P	P	P
	Battery Lights Testing (on B&G Inspections)	Q	Refer to your B&G Routine and Formal Inspection Schedules											
	Intercom Inspections on Annual LUI	A	Refer to LUI Schedule											
	Call-for Aid	A									P			
	Exterior Lights - visual Inspect.	W	Daily/Weekly Laborers/JGs/RC should note any obvious roblems and report immediately											
	Exterior Lights (on B&G Inspections)	Q	Refer to your B&G Routine and Formal Inspection Schedules											
	Exterior Lights -Nite Inspection	A		P										
	Exterior Lights -Servicing, coordinate with Boom Lift/Aerial Truck Schedule	AN												
28 - Fire Safety Systems	Fire Alarm Sys - Inspection	W	Daily/Weekly Laborers/JGs/RC/Mgr./Suer must inspect master alarm anel check and report any roblems immediately											
	Fire Alarm Sys. Service Contractor (and Inspect on B&G Inspections)	Q			P			P			P			P
	Extinguishers -visual Inspect.	W	Daily/Weekly Laborers/JGs/RC/Mgr./Suer must check fired extinguishers and report any roblems immediately											
	Extinguishers (on B&G Inspections)	Q	Refer to B&G Schedule											
	Extinguishers serviced by outside contractor	A										P		
	Srinkler Systems	W	Daily/Weekly Laborers/JGs/RC shall conduct a visual inspection and report any roblems immediately											
	Srinkler Systems Service Contract	A										P		
	Fire um Service Contractor	A												P
	Smoke Detector-visual Inspect.	W	Daily/Weekly Laborers/JGs/RC shall conduct a visual inspection and report any roblems immediately											
	Smoke Detector in Common Areas Inspection (on B&G Inspections)	Q	Refer to B&G Schedule											
	Smoke Detector testing & battery relacement	A	Refer to LUI Schedule											
	Smoke Hatch Inspect	W	Daily/Weekly Laborers/JGs/RC shall conduct a visual inspection and report any roblems immediately											
	Smoke Hatch Inspect (on B&G Inspections)	Q	Refer to B&G Schedule											
	Smoke Hatch Service	A	N/A											
31 - lumbing	Water Distribution System Inspect	M	P	P	P	P	P	P	P	P	P	P	P	P
	Water Distribution System Inspect(on LUI)	A	Refer to LUI Schedule											
	Water Distribution System Testing - by lumber	A			P									
	Vertical Drains - Clean/Check - lumber	A			P									
	Horiz Drains - Clean/Check - lumber	A	P											
	Back Flow reventers - Inspect by BWSC	A		P										
	Domestic Hotwater Sys - Inspect.	M	P	P	P	P	P	P	P	P	P	P	P	P

D=Daily; W=Weekly; M=Monthly; Q=Quarterly; T-Three times per year; S=Semi-Annual; A=Annual AN=As Needed.

Indicate date Planned at beginning of each fiscal year by writing or typing P. Indicate actual Completed month by typing or writing C.

ENANCE SCHEDULE & report FORM (ART 1 - BUILDING SYSTEMS)REVENTIVE MAINTENANCE SCHEDULE & report FORM (ART 1 - BI

Dev #	Develoment Name	Use P to denote when Task is Planned
501	WEST BROADWAY	

Refer to Chater in SO Manual	reventive Maintenance on Building Systems which includes: Inspecting - Testing - Cleaning - Servicing - Reair - Relacement													
	Item:	Schd	Ar	May	June	July	Aug	Se	Oct	Nov	Dec	Jan	Feb	Mar
	Domestic Hotwater Sys - Inspect on LUI	A	Refer to LUI Schedule											
	Domestic Hotwater Sys - Drain & Flush by lumber	A	N/A											
32 - Vent. & AC	Window A/C - Service	A	N/A											
	Roof To Exhaust Fan - Inspect.	Q	Refer to B&G Schedule											
	Roof To Exhaust Fan - Electrician	A	N/A											
	Boiler Rm. Makeu Air Unit. - by Fireman	A	N/A											
	Air handling Units/Common Area Ventilation - by Mechanic	W/Q	Weekly/Quarterly Inspection - Laborers/JGs/RC/Mgrs/Suers should note any obvious roblems and report immediately											
	Air handling Units/Common Area Ventilation - by Mechanic	A	N/A											
	Slit System AC & Heat ums - Inspect	W/Q	Weekly/Quarterly Inspection - Mgrs/Suers should note any obvious roblems and report immediately											
	Slit System AC & Heat ums - Contractor Service	A										P		
33 - Roofs	Roofs - on Inspections	W/Q	Weekly/Quarterly Inspection - Laborers/JGs/RC/Mgrs/Suers should note any obvious roblems and report immediately											
	Roof - Inspection following rainstorm	Q	P			P			P			P		
	Roofs - Inspect by roofing Crew	A		P										
34 - Small Equipment & Skid Loaders	Landscae Equi. (Nov. - March)	A	P											
	Snow Removal Equi. (Arl - Oct.)	A								P	P	P	P	P
	Skid Steel Ldr	T	P											
35 - Vehicles & Trucks	pick-u/Rack Body Truck	D	Daily/uon each use - Truck Driver is resonsible for conducting a visual Inspection and check fluid every time truck is fueled. At each re-fueling, complete the truck Inspection checklist.											
	pick-u/Rack Body Truck - by Garage	Q			P			P			P			P
Refer to Chapter in SOP Manual	Regular Custodial Maintenance subject to Preventive Maintenance													
	Item:	Schd	Apr	May	June	July	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar
11 - B&G (And Ch. 37)	Weekly Walk Through	D/W	Daily/Weekly Laborers/JGs/RC shall conduct a visual inspection and report any problems immediately											
	Monthly Walk through by Supers/Managers	M	Refer to B&G Routine Inspection Schedule											
	Formal Qrtly. Insp. On B&G Inspections	Q	Refer to Formal Quarterly B&G Schedules											
12 - Hallway (and Ch. 37)	Weekly Walk Through	D/W	Daily/Weekly Laborers/JGs/RC shall conduct a visual inspection and report any problems immediately											
	Monthly Walk through by Supers/Managers	M	Refer to B&G Routine Inspection Schedule											
	Formal Qrtly. Insp. On B&G Inspections	Q	Refer to Formal Quarterly B&G Schedules											
14 - Snow Removal Plan (and Ch. 37)	Annual Plan	A							P					
	Snow Removal	AN								P	P	P	P	
15 - Trash Removal (and Ch. 37)	Weekly Walk Through	D/W	Daily/Weekly Laborers/JGs/RC shall inspect & clean and report any problems immediately											
	Monthly Walk through by Supers/Managers	M	Refer to B&G Routine Inspection Schedule											
	Formal Qrtly. Insp. On B&G Inspections	Q	Refer to Formal Quarterly B&G Schedules											

D=Daily; W=Weekly; M=Monthly; Q=Quarterly; T=Three times per year; S=Semi-Annual; A=Annual AN=As Needed.

Indicate date Planned at beginning of each fiscal year by writing or typing P. Indicate actual Completed month by typing or writing C.

ENANCE SCHEDULE & report FORM (ART 1 - BUILDING SYSTEMS)REVENTIVE MAINTENANCE SCHEDULE & report FORM (ART 1 - BI

Dev #	Develoment Name	Use P to denote when Task is Planned
501	WEST BROADWAY	

Refer to Chater in SO Manual	reventive Maintenance on Building Systems which includes: Inspecting - Testing - Cleaning - Servicing - Reair - Relacement													
	Item:	Schd	Ar	May	June	July	Aug	Se	Oct	Nov	Dec	Jan	Feb	Mar
	Annual Survey	A	P											
16 - Pest Management (And Ch. 37)	Annual Plan	A	P											
	Inspect for Pest Activity during any inspection eg LUI Inspections and qrtly Inspections	W/Q/A	Daily/Weekly Laborers/JGs/RC shall report any pest activity immediately. Refer to B&G Inspection Schedule and LUI Inspection Schedule for Quarterly/Annual Inspections											
	Flush-Out (units that are not part of IPM Plan)	S												
	Basement/crawl spaces Inspect	Q			P			P			P			P
	Bait Storm Drains - to control West Nile Virus	A				P								
	IPM	as per plan	P	P	P	P	P	P	P	P	P	P	P	P
13 - Grounds & Landscape Care	Annual Landscape Maintenance Plan	A	Refer to Landscape Maintenance Calendar for Schedule											
	Spring Cleanup	A												
	Mulching Planting areas	A												
	Lawn Fertilization/Lime	A												
	Lawn Weed Control	A												
	Hardscape Weed Control	A & AN												
	Lawn Grub Control	A/AN												
	Lawn Aeration	A												
	Lawn Overseeding	A												
	Planting Bed Weed/Feed Control	W												
	Planting Beed Weed Control	W												
	Watering	W												
	Lawn Mowing	W												
	Fall Leaf Pick up & Removal	A												
	Tree Inspections (with B&G Inspections)	W/Q	Daily/Weekly Laborers/JGs/RC shall conduct a visual inspection and report any problems immediately. Refer to B&G for formal quarterly inspection schedule											
	Tree Maintenance - as per plan	A & AN	Refer to Landscape Maintenance Calendar for Schedule											
	Shrub Inspection (with B&G Inspections)	W/Q	Daily/Weekly Laborers/JGs/RC shall conduct a visual inspection and report any problems immediately. Refer to B&G for formal quarterly inspection schedule											
	Shrub Maintenance - as per plan	A & AN	Refer to Landscape Maintenance Calendar for Schedule											
	Flower Planting	A or S												
	Playground/Fence & Bench Inspect.	D/W	Daily/Weekly Laborers/JGs/RC shall conduct a visual inspection and report any problems immediately											
Monthly Walk through by Supers/Managers	M	Refer to B&G Monthly Inspection Schedule												
Replenish Fibar Mulch for playground surface	A/AN	P												
Thorough Playground Inspection before school vacation.	A	P												
Playground/Fence & Bench Formal Inspection (on B&G Inspections)	Q	Refer to Formal Quarterly B&G Schedules												
Heating System Description: Gas Fired System (Refer to SOP Manual Chapter 30)														
Task:	Schd	Apr	May	June	July	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	
Daily Service Activities	D	P	P	P	P	P	P	P	P	P	P	P	P	

D=Daily; W=Weekly; M=Monthly; Q=Quarterly; T-Three times per year; S=Semi-Annual; A=Annual AN=As Needed.
Indicate date Planned at beginning of each fiscal year by writing or typing P. Indicate actual Completed month by typing or writing C.

ENANCE SCHEDULE & report FORM (ART 1 - BUILDING SYSTEMS)REVENTIVE MAINTENANCE SCHEDULE & report FORM (ART 1 - B

Dev #	Develoment Name	Use P to denote when Task is Planned
501	WEST BROADWAY	

Refer to Chater in SO Manual	reventive Maintenance on Building Systems which includes: Inspecting - Testing - Cleaning - Servicing - Reair - Relacement													
	Item:	Schd	Ar	May	June	July	Aug	Se	Oct	Nov	Dec	Jan	Feb	Mar
Weekly Service Activities	W	P	P	P	P	P	P	P	P	P	P	P	P	
Feed Pump	M	P	P	P	P	P	P	P	P	P	P	P	P	
Burner Motor	M	P	P	P	P	P	P	P	P	P	P	P	P	
Air Handler	M	P	P	P	P	P	P	P	P	P	P	P	P	
Circulating Pump	M	P	P	P	P	P	P	P	P	P	P	P	P	
Annual Cleaning	A					P								
State Inspection	A						P							

D = Daily; W = Weekly M = Monthly Q = Quarterly T = Three times per year S = Semi-Annual A = Annual AN = As Needed
Indicate date planned at beginning of each fiscal year by writing or typing P Indicate actual Completed month by typing or writing C

PREVENTIVE MAINTENANCE SCHEDULE & REPORT FORM (PART 1 - BUILDING SYSTEMS)

Dev #	Development Name
505	Fairmount

Use P to denote when Task is Planned

Refer to Chapter in SOP Manual	Preventive Maintenance on Building Systems which includes: Inspecting - Testing - Cleaning - Servicing - Repair - Replacement													
	Item:	Schd	Apr	May	June	July	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar
26 - Electrical	Electrical Distribution Inspection	A	P											
	Battery Lights, visual inspect.	W	Daily/Weekly Laborers/JGs/RC should note any obvious breakage and report immediately											
	Battery Lights Testing	M	P	P	P	P	P	P	P	P	P	P	P	P
	Battery Lights Testing (on B&G Inspections)	Q	Refer to your B&G Routine and Formal Inspection Schedules											
	Exterior Lights - visual inspect.	W	Daily/Weekly Laborers/JGs/RC should note any obvious problems and report immediately											
	Exterior Lights (on B&G Inspections)	Q	Refer to your B&G Routine and Formal Inspection Schedules											
	Exterior Lights -Nite Inspection	A						P						
	Exterior Lights -Servicing, coordinate with Boom Lift/Aerial Truck Schedule	AN							P	P				
	Extinguishers -visual inspect.	W	Daily/Weekly Laborers/JGs/RC/Mgr./Super must check fired extinguishers and report any problems immediately											
	Extinguishers (on B&G Inspections)	Q	Refer to B&G Schedule											
	Extinguishers serviced by outside contractor	A	P											
	Smoke Detector-visual inspect.	W	Daily/Weekly Laborers/JGs/RC shall conduct a visual inspection and report any problems immediately											
	Smoke Detector in Common Areas Inspection (on B&G Inspections)	Q	Refer to B&G Schedule											
	Smoke Detector testing & battery replacement	A	Refer to LUI Schedule											
31 - Plumbing	Water Distribution System Inspect	M	P	P	P	P	P	P	P	P	P	P	P	P
	Water Distribution System Inspect(on LUI)	A	Refer to LUI Schedule											
	Water Distribution System Testing - by Plumber	A	P											
	Vertical Drains - Clean/Check - Plumber	A	P											
	Horiz Drains - Clean/Check - Plumber	A	P											
	Domestic Hotwater Sys - Inspect.	M	P	P	P	P	P	P	P	P	P	P	P	P
	Domestic Hotwater Sys - Inspect on LUI	A	Refer to LUI Schedule											
	Domestic Hotwater Sys - Drain & Flush by Plumber	A												P
32 - Vent. & AC	Window A/C - Service	A		P										
33 - Roofs	Roofs - on Inspections	W/Q	Weekly/Quarterly Inspection - Laborers/JGs/RC/Mgrs/Supers should note any obvious problems and report immediately											
	Roof - Inspection following rainstorm	Q			P			P			P			P
34 - Small Equipment & Skid Loaders	Landscape Equip. (Nov. - March)	A												P
	Snow Removal Equip. (April - Oct.)	A							P					
35 - Vehicles & Trucks	Pick-up/Rack Body Truck	D	Daily/upon each use - Truck Driver is responsible for conducting a visual inspection and check fluid every time truck is fueled. At each re-fueling, complete the truck inspection checklist.											
	Pick-up/Rack Body Truck - by Garage	Q			P			P			P			P
Refer to Chapter in SOP Manual	Regular Custodial Maintenance subject to Preventive Maintenance													
	Item:	Schd	Apr	May	June	July	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar
	Weekly Walk Through	D/W	Daily/Weekly Laborers/JGs/RC shall conduct a visual inspection and report any problems immediately											

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Boston Housing Authority
Standard Operating Procedures
Development Profile and Systems Inventory
Work-in-Progress

PREVENTIVE MAINTENANCE SCHEDULE & REPORT FORM (PART 1 - BUILDING SYSTEMS)

Dev #	Development Name
505	Fairmount

Use P to denote when Task is Planned

Refer to Chapter in SOP Manual	Preventive Maintenance on Building Systems which includes: Inspecting - Testing - Cleaning - Servicing - Repair - Replacement													
	Item:	Schd	Apr	May	June	July	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar
11 - B&G (And Ch. 37)	Monthly Walk through by Supers/Managers	M	Refer to B&G Routine Inspection Schedule											
	Formal Qrtly. Insp. On B&G Inspections	Q	Refer to Formal Quarterly B&G Schedules											
12 - Hallway (and Ch. 37)	Weekly Walk Through	D/W	Daily/Weekly Laborers/JGs/RC shall conduct a visual inspection and report any problems immediately											
	Monthly Walk through by Supers/Managers	M	Refer to B&G Routine Inspection Schedule											
	Formal Qrtly. Insp. On B&G Inspections	Q	Refer to Formal Quarterly B&G Schedules											
14 - Snow Removal Plan (and Ch. 37)	Annual Plan	A							P					
	Snow Removal	AN								P	P	P	P	P
15 - Trash Removal (and Ch. 37)	Weekly Walk Through	D/W	Daily/Weekly Laborers/JGs/RC shall inspect & clean and report any problems immediately											
	Monthly Walk through by Supers/Managers	M	Refer to B&G Routine Inspection Schedule											
	Formal Qrtly. Insp. On B&G Inspections	Q	Refer to Formal Quarterly B&G Schedules											
	Annual Survey	A							P					
16 - Pest Management (And Ch. 37)	Annual Plan	A												P
	Inspect for Pest Activity during any inspection eg LUI Inspections and qrtly Inspections	W/Q/A	Daily/Weekly Laborers/JGs/RC shall report any pest activity immediately. Refer to B&G Inspection Schedule and LUI Inspection Schedule for Quarterly/Annual Inspections											
	Flush-Out (units that are not part of IPM Plan)	S												
	Basement/crawl spaces Inspect	Q			P			P			P			P
	Bait Storm Drains - to control West Nile Virus	A				P								
	IPM	as per plan	P	P	P	P	P	P	P	P	P	P	P	P
13 - Grounds & Landscape Care	Annual Landscape Maintenance Plan	A												P
	Spring Cleanup	A	P											
	Mulching Planting areas	A	P											
	Lawn Fertilization/Lime	A	Refer to Landscape Maintenance Calendar for Schedule											
	Lawn Weed Control	A	Refer to Landscape Maintenance Calendar for Schedule											
	Hardscape Weed Control	A & AN	Refer to Landscape Maintenance Calendar for Schedule											
	Lawn Grub Control	A/AN	Refer to Landscape Maintenance Calendar for Schedule											
	Lawn Aeration	A	Refer to Landscape Maintenance Calendar for Schedule											
	Lawn Overseeding	A	Refer to Landscape Maintenance Calendar for Schedule											
	Planting Bed Weed/Feed Control	P	P	P	P	P	P	P	P	P	P	P	P	P
	Planting Bed Weed Control	W	Refer to Landscape Maintenance Calendar for Schedule											
	Watering	W	Refer to Landscape Maintenance Calendar for Schedule											
	Lawn Mowing	W	Refer to Landscape Maintenance Calendar for Schedule											
	Fall Leaf Pick up & Removal	A							P	P				
	Tree Inspections (with B&G Inspections)	W/Q	Daily/Weekly Laborers/JGs/RC shall conduct a visual inspection and report any problems immediately. Refer to B&G for formal quarterly inspection schedule											
	Tree Maintenance - as per plan	A & AN	Refer to Landscape Maintenance Calendar for Schedule											
	Shrub Inspection (with B&G Inspections)	W/Q	Daily/Weekly Laborers/JGs/RC shall conduct a visual inspection and report any problems immediately. Refer to B&G for formal quarterly inspection schedule											
	Shrub Maintenance - as per plan	A & AN	Refer to Landscape Maintenance Calendar for Schedule											

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PREVENTIVE MAINTENANCE SCHEDULE & REPORT FORM (PART 1 - BUILDING SYSTEMS)

Dev #	Development Name
505	Fairmount

Use P to denote when Task is Planned

Refer to Chapter in SOP Manual	Preventive Maintenance on Building Systems which includes: Inspecting - Testing - Cleaning - Servicing - Repair - Replacement													
	Item:	Schd	Apr	May	June	July	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar
	Flower Planting	A or S	Refer to Landscape Maintenance Calendar for Schedule											
	Basketball Court/Fence Inspect.	D/W	Daily/Weekly Laborers/JGs/RC shall conduct a visual inspection and report any problems immediately											
	Monthly Walk through by Supers/Managers	M	Refer to B&G Monthly Inspection Schedule											
	Basketball Court/Fence Formal Inspection (on B&G Inspections)	Q	Refer to Formal Quarterly B&G Schedules											
Heating System Description: Gas Fired System (Refer to SOP Manual Chapter 30)														
Task:	Schd	Apr	May	June	July	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	
Annual Cleaning and Filter Replacement	A						P							

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Boston Housing Authority
 Standard Operating Procedures
 Development Profile and Systems Inventory
 Work in Progress
PREVENTIVE MAINTENANCE SCHEDULE & REPORT FORM (PART 1 - BUILDING SYSTEMS)

Dev #	Development Name	Name of person inputting data	Date of Input	Use P to denote when Task is Planned Use C to denote when task is Completed If task is completed when scheduled use P/C - REFER TO SAMPLE											
507	ARCHDALE														

Refer to Chapter in SOP Manual	Preventive Maintenance on Building Systems which includes: inspecting - Testing - Cleaning - Servicing - Repair - Replacement														
	Item:	Schd	Apr	May	June	July	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	
26 - Electrical	Electrical Distribution Inspection	A		P				P				P			
	Battery Lights, visual inspect.	W	Daily/Weekly Laborers/JGs/RC should note any obvious breakage and report immediately												
	Battery Lights Testing	M	P	P	P	P	P	P	P	P	P	P	P	P	
	Battery Lights Testing (on B&G Inspections)	Q	Refer to your B&G Routine and Formal inspection Schedules												
	Intercom inspections on Annual LUI	A	Refer to LUI Schedule												
	Exterior Lights - visual inspect.	W	Daily/Weekly Laborers/JGs/RC should note any obvious problems and report immediately												
	Exterior Lights (on B&G inspections)	Q	Refer to your B&G Routine and Formal inspection Schedules												
	Exterior Lights -Nite inspection	A											P		
	Exterior Lights -Servicing, coordinate with Boom Lift/Aerial Truck Schedule	AN	P											P	
28 - Fire Safety Systems	Fire Alarm Sys - inspection	W	Daily/Weekly Laborers/JGs/RC/Mgr./Super must inspect master alarm panel check and report any problems immediately												
	Fire Alarm Sys. Service Contractor (and inspect on B&G inspections)	Q			P			P			P			P	
	Extinguishers -visual inspect.	W	Daily/Weekly Laborers/JGs/RC/Mgr./Super must check fired extinguishers and report any problems immediately												
	Extinguishers (on B&G inspections)	Q	Refer to B&G Schedule												
	Extinguishers serviced by outside contractor	A		P											
	Smoke Detector-visual inspect.	W	Daily/Weekly Laborers/JGs/RC shall conduct a visual inspection and report any problems immediately												
	Smoke Detector in Common Areas inspection (on B&G inspections)	Q	Refer to B&G Schedule												
	Smoke Detector testing & battery replacement	A	Refer to LUI Schedule												
31 -Plumbing	Water Distribution System inspect	M	P	P	P	P	P	P	P	P	P	P	P	P	
	Water Distribution System inspect(on LUI)	A	Refer to LUI Schedule												
	Water Distribution System Testing - by plumber	A		P				P		P					
	Vertical Drains - Clean/Check - plumber	A		P				P		P					
	Horiz Drains - Clean/Check - plumber	A		P				P		P					
	Back Flow preventers - inspect by BWSC	A												P	
	Domestic Hotwater Sys - inspect.	M		P				P		P					
	Domestic Hotwater Sys - inspect on LUI	A	Refer to LUI Schedule												
32 - Vent. & AC	Window A/C - Service	A		P											
	Boiler Rm. Makeup Air Unit. -	A					P								
33 - Roofs	Roofs - on inspections	W/Q	Weekly/Quarterly inspection - Laborers/JGs/RC/Mgrs/Supers should note any obvious problems and report immediately												
	Roof - inspection following rainstorm	Q		P				P		P					
34 - Small Equipment & Skid Loaders	Landscape Equip. (Nov. - March)	A		P											
	Snow Removal Equip. (April - Oct.)	A							P						
	Skid Steel Ldr	A							P						

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PREVENTIVE MAINTENANCE SCHEDULE & REPORT FORM (PART 1 - BUILDING SYSTEMS)

Dev #	Development Name	Name of person inputting data	Date of Input	Use P to denote when Task is Planned Use C to denote when task is Completed If task is completed when scheduled use P/C - REFER TO SAMPLE											
507	ARCHDALE														

Refer to Chapter in SOP Manual	Preventive Maintenance on Building Systems which includes: inspecting - Testing - Cleaning - Servicing - Repair - Replacement														
	Item:	Schd	Apr	May	June	July	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	
35 - Vehicles & Trucks	Pick-up / Truck	D	Daily/upon each use - Truck Driver is responsible for conducting a visual inspection and check fluid every time truck is fueled. At each re-fueling, complete the truck inspection checklist.												
	Pick-up Truck - by Garage	Q		P			P			P			P		

Refer to Chapter in SOP Manual	Regular Custodial Maintenance subject to Preventive Maintenance														
	Item:	Schd	Apr	May	June	July	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	
11 - B&G (And Ch. 37)	Weekly Walk Through	D/W	Daily/Weekly Laborers/JGs/RC shall conduct a visual inspection and report any problems immediately												
	Monthly Walk through by Supers/Managers	M	Refer to B&G Routine Inspection Schedule												
	Formal Qrtly. Insp. On B&G Inspections	Q	Refer to Formal Quarterly B&G Schedules												
12 - Hallway (and Ch. 37)	Weekly Walk Through	D/W	Daily/Weekly Laborers/JGs/RC shall conduct a visual inspection and report any problems immediately												
	Monthly Walk through by Supers/Managers	M	Refer to B&G Routine Inspection Schedule												
	Formal Qrtly. Insp. On B&G Inspections	Q	Refer to Formal Quarterly B&G Schedules												
14 - Snow Removal Plan (and Ch. 37)	Annual Plan	A							P						
	Snow Removal	AN	P							P	P	P	P	P	
15 - Trash Removal (and Ch. 37)	Weekly Walk Through	D/W	Daily/Weekly Laborers/JGs/RC shall inspect & clean and report any problems immediately												
	Monthly Walk through by Supers/Managers	M	Refer to B&G Routine Inspection Schedule												
	Formal Qrtly. Insp. On B&G Inspections	Q	Refer to Formal Quarterly B&G Schedules												
	Annual Survey	A			P										
16 - Pest Management (And Ch. 37)	Annual Plan	A												P	
	Inspect for Pest Activity during any inspection eg LUI Inspections and qrtly Inspections	W/Q/A	Daily/Weekly Laborers/JGs/RC shall report any pest activity immediately. Refer to B&G Inspection Schedule and LUI Inspection Schedule for Quarterly/Annual Inspections												
	Bait Storm Drains - to control West Nile Virus	A				p									
	IPM	as per plan	P	P	P	P	P	P	P	P	P	P	P	P	
13 - Grounds &	Annual Landscape Maintenance Plan	A	Refer to Landscape Maintenance Calendar for Schedule												
	Spring Cleanup	A	Refer to Landscape Maintenance Calendar for Schedule												
	Mulching Planting areas	A	Refer to Landscape Maintenance Calendar for Schedule												
	Lawn Fertilization/Lime	A	Refer to Landscape Maintenance Calendar for Schedule												
	Lawn Weed Control	A	Refer to Landscape Maintenance Calendar for Schedule												
	Hardscape Weed Control	A & AN	Refer to Landscape Maintenance Calendar for Schedule												
	Lawn Grub Control	A/AN	Refer to Landscape Maintenance Calendar for Schedule												
	Lawn Aeration	A	Refer to Landscape Maintenance Calendar for Schedule												
	Lawn Overseeding	A	Refer to Landscape Maintenance Calendar for Schedule												
	Planting Bed Weed/Feed Control	W	Refer to Landscape Maintenance Calendar for Schedule												
	Planting Beed Weed Control	W	Refer to Landscape Maintenance Calendar for Schedule												
	Watering	W	Refer to Landscape Maintenance Calendar for Schedule												
	Lawn Mowing	W	Refer to Landscape Maintenance Calendar for Schedule												
	Fall Leaf Pick up & Removal	A	Refer to Landscape Maintenance Calendar for Schedule												

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PREVENTIVE MAINTENANCE SCHEDULE & REPORT FORM (PART 1 - BUILDING SYSTEMS)

Dev #	Development Name	Name of person inputting data	Date of Input	Use P to denote when Task is Planned Use C to denote when task is Completed If task is completed when scheduled use P/C - REFER TO SAMPLE										
507	ARCHDALE													

Refer to Chapter in SOP Manual	Preventive Maintenance on Building Systems which includes: inspecting - Testing - Cleaning - Servicing - Repair - Replacement													
	Item:	Schd	Apr	May	June	July	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar
Landscape Care	Tree Inspections (with B&G Inspections)	W/Q	Daily/Weekly Laborers/JGs/RC shall conduct a visual inspection and report any problems immediately. Refer to B&G for formal quarterly inspection schedule											
	Tree Maintenance - as per plan	A & AN	Refer to Landscape Maintenance Calendar for Schedule											
	Shrub Inspection (with B&G Inspections)	W/Q	Daily/Weekly Laborers/JGs/RC shall conduct a visual inspection and report any problems immediately. Refer to B&G for formal quarterly inspection schedule											
	Shrub Maintenance - as per plan	A & AN	Refer to Landscape Maintenance Calendar for Schedule											
	Flower Planting	A or S	Refer to Landscape Maintenance Calendar for Schedule											
	Playground/Fence & Bench Inspect.	D/W	Daily/Weekly Laborers/JGs/RC shall conduct a visual inspection and report any problems immediately											
	Monthly Walk through by Supers/Managers	M	Refer to B&G Monthly Inspection Schedule											
	Replenish Fibar Mulch for playground surface	A/AN	Refer to Landscape Maintenance Calendar for Schedule											
	Thorough Playground Inspection before school vacation.	A	Refer to Landscape Maintenance Calendar for Schedule											
	Playground/Fence & Bench Formal Inspection (on B&G Inspections)	Q	Refer to Formal Quarterly B&G Schedules											

Heating System Description: Gas Fired System (Refer to SOP Manual Chapter 30)														
Task:	Schd	Apr	May	June	July	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	
Daily Service Activities	D	P	P	P	P	P	P	P	P	P	P	P	P	
Weekly Service Activities	W	P	P	P	P	P	P	P	P	P	P	P	P	
Feed Pump	M	P	P	P	P	P	P	P	P	P	P	P	P	
Burner Motor	M	P	P	P	P	P	P	P	P	P	P	P	P	
Air Handler	M	P	P	P	P	P	P	P	P	P	P	P	P	
Circulating Pump	M	P	P	P	P	P	P	P	P	P	P	P	P	
Annual Cleaning	A					P								
State Inspection	A						P							

PREVENTIVE MAINTENANCE SCHEDULE & REPORT FORM (PART 1 - BUILDING SYSTEMS)

Dev #	Development Name	Use P to denote when Task is Planned												
510	Gallivan													

Refer to Chapter in SOP Manual	Preventive Maintenance on Building Systems which includes: Inspecting - Testing - Cleaning - Servicing - Repair - Replacement														
	Item:	Schd	Apr	May	June	July	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	
26 - Electrical	Exterior Lights - visual inspect.	W	Daily/Weekly Laborers/JGs/RC should note any obvious problems and report immediately												
	Exterior Lights (on B&G Inspections)	Q	Refer to your B&G Routine and Formal Inspection Schedules												
	Exterior Lights -Nite Inspection	A							P						
28 - Fire Safety Systems	Exterior Lights -Servicing, coordinate with Boom Lift/Aerial Truck Schedule	AN								P					
	Extinguishers -visual inspect.	W	Daily/Weekly Laborers/JGs/RC/Mgr./Super must check fired extinguishers and report any problems immediately												
	Extinguishers (on B&G Inspections)	Q	Refer to B&G Schedule												
	Extinguishers serviced by outside contractor	A								P					
	Smoke Detector-visual inspect.	W	Daily/Weekly Laborers/JGs/RC shall conduct a visual inspection and report any problems immediately												
	Smoke Detector testing & battery replacement	A	Refer to LUI Schedule												
	Horiz Drains - Check	A	Refer to LUI Schedule												
	Domestic Hotwater Sys - Inspect.	M	Refer to LUI Schedule												
	Domestic Hotwater Sys - Inspect on LUI	A	Refer to LUI Schedule												
32 - Vent. & AC	Window A/C - Service	A		P											
33 - Roofs	Roofs - on Inspections	W/Q	Weekly/Quarterly Inspection - Laborers/JGs/RC/Mgrs/Supers should note any obvious problems and report immediately												
34 - Small Equipment & Skid Loaders	Landscape Equip. (Nov. - March)	A	P												
	Snow Removal Equip. (April - Oct.)	A							P						
	Skid Steel Ldr	T							P						
35 - Vehicles & Trucks	Pick-up Truck	D	Daily/upon each use - Truck Driver is responsible for conducting a visual inspection and check fluid every time truck is fueled. At each re-fueling, complete the truck inspection checklist.												
	Pick-up Truck - by Garage	?									P				
Refer to Chapter in SOP Manual	Regular Custodial Maintenance subject to Preventive Maintenance														
	Item:	Schd	Apr	May	June	July	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	
11 - B&G (And Ch. 37)	Weekly Walk Through	D/W	Daily/Weekly Laborers/JGs/RC shall conduct a visual inspection and report any problems immediately												
	Monthly Walk through by Supers/Managers	M	Refer to B&G Routine Inspection Schedule												
	Formal Qrtly. Insp. On B&G Inspections	Q	Refer to Formal Quarterly B&G Schedules												
12 - Hallway (and Ch. 37)	Weekly Walk Through	D/W	Daily/Weekly Laborers/JGs/RC shall conduct a visual inspection and report any problems immediately												
	Monthly Walk through by Supers/Managers	M	Refer to B&G Routine Inspection Schedule												
	Formal Qrtly. Insp. On B&G Inspections	Q	Refer to Formal Quarterly B&G Schedules												
14 - Snow Removal Plan (and Ch. 37)	Annual Plan	A							P						
	Snow Removal	AN								P	P	P	P	P	
15 - Trash Removal (and Ch. 37)	Weekly Walk Through	D/W	Daily/Weekly Laborers/JGs/RC shall inspect & clean and report any problems immediately												
	Monthly Walk through by Supers/Managers	M	Refer to B&G Routine Inspection Schedule												

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PREVENTIVE MAINTENANCE SCHEDULE & REPORT FORM (PART 1 - BUILDING SYSTEMS)

Dev #	Development Name	Use P to denote when Task is Planned											
510	Gallivan												

Refer to Chapter in SOP Manual	Preventive Maintenance on Building Systems which includes: Inspecting - Testing - Cleaning - Servicing - Repair - Replacement													
	Item:	Schd	Apr	May	June	July	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar
Removal (and Ch. 37)	Formal Qrtly. Insp. On B&G Inspections	Q	Refer to Formal Quarterly B&G Schedules											
	Annual Survey	A							P					
	Annual Plan	A												P
16 - Pest Management (And Ch. 37)	Inspect for Pest Activity during any inspection eg LUI Inspections and qrtly Inspections	W/Q/A	Daily/Weekly Laborers/JGs/RC shall report any pest activity immediately. Refer to B&G Inspection Schedule and LUI Inspection Schedule for Quarterly/Annual Inspections											
	Bait Storm Drains - to control West Nile Virus	A				P								
	IPM	as per plan	P	P	P	P	P	P	P	P	P	P	P	P
	Annual Landscape Maintenance Plan	A	P											
13 - Grounds & Landscape Care	Spring Cleanup	A	P	P										
	Mulching Planting areas	A		P										
	Hardscape Weed Control	A & AN				P	P							
	Planting Beed Weed Control	W	Refer to Landscape Maintenance Calendar for Schedule											
	Watering	W	Refer to Landscape Maintenance Calendar for Schedule											
	Lawn Mowing	W	Refer to Landscape Maintenance Calendar for Schedule											
	Fall Leaf Pick up & Removal	A							P	P	P			
	Tree Inspections (with B&G Inspections)	W/Q	Daily/Weekly Laborers/JGs/RC shall conduct a visual inspection and report any problems immediately. Refer to B&G for formal quarterly inspection schedule											
	Tree Maintenance - as per plan	every other year												
	Shrub Inspection (with B&G Inspections)	W/Q	Daily/Weekly Laborers/JGs/RC shall conduct a visual inspection and report any problems immediately. Refer to B&G for formal quarterly inspection schedule											
	Flower Planting	A or S		P				P						
	Fence Inspection	D/W	Daily/Weekly Laborers/JGs/RC shall conduct a visual inspection and report any problems immediately											
	Monthly Walk through by Supers/Managers	M	Refer to B&G Monthly Inspection Schedule											
	Fence Formal Inspection (on B&G Inspections)	Q	Refer to Formal Quarterly B&G Schedules											
	Heating System Description: Gas Fired System (Refer to SOP Manual Chapter 30)													
Task:	Schd	Apr	May	June	July	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	
Annual Cleaning and Inspection	A				P	P	P							

D = Daily; W = Weekly M = Monthly Q = Quarterly T = Three times per year S = Semi-Annual A = Annual AN = As Needed

Boston Housing Authority
Standard Operating Procedures
Development Profile and Systems Inventory
Work in Progress

PREVENTIVE MAINTENANCE SCHEDULE & REPORT FORM (PART 1 - BUILDING SYSTEMS)

Dev #	Development Name
512	South Street

Use P to denote when Task is Planned

Refer to Chapter in SOP Manual	Preventive Maintenance on Building Systems which includes: inspecting - Testing - Cleaning - Servicing - Repair - Replacement													
	Item:	Schd	Apr	May	June	July	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar
26 - Electrical	Electrical Distribution Inspection	A		C				P				P		
	Battery Lights, visual inspect.	W	Daily/Weekly Laborers/JGs/RC should note any obvious breakage and report immediately											
	Battery Lights Testing	M	C	C	C	C	C	P	P	P	P	P	P	P
	Battery Lights Testing (on B&G Inspections)	Q	Refer to your B&G Routine and Formal inspection Schedules											
	Intercom inspections on Annual LUI	A	Refer to LUI Schedule											
	Exterior Lights - visual inspect.	W	Daily/Weekly Laborers/JGs/RC should note any obvious problems and report immediately											
	Exterior Lights (on B&G inspections)	Q	Refer to your B&G Routine and Formal inspection Schedules											
	Exterior Lights -Nite inspection	A											P	
28 - Fire Safety Systems	Exterior Lights -Servicing, coordinate with Boom Lift/Aerial Truck Schedule	AN												P
	Fire Alarm Sys - inspection	W	Daily/Weekly Laborers/JGs/RC/Mgr./Super must inspect master alarm panel check and report any problems immediately											
	Fire Alarm Sys. Service Contractor (and inspect on B&G inspections)	Q			P			P			P			P
	Extinguishers -visual inspect.	W	Daily/Weekly Laborers/JGs/RC/Mgr./Super must check fired extinguishers and report any problems immediately											
	Extinguishers (on B&G inspections)	Q	Refer to B&G Schedule											
	Extinguishers serviced by outside contractor	A						P						
	Smoke Detector-visual inspect.	W	Daily/Weekly Laborers/JGs/RC shall conduct a visual inspection and report any problems immediately											
	Smoke Detector in Common Areas inspection (on B&G inspections)	Q	Refer to B&G Schedule											
31 -Plumbing	Smoke Detector testing & battery replacement	A	Refer to LUI Schedule											
	Water Distribution System inspect	M	P	P	P	P	P	P	P	P	P	P	P	P
	Water Distribution System inspect(on LUI)	A	Refer to LUI Schedule											
	Water Distribution System Testing - by plumber	A		P				P		P				
	Vertical Drains - Clean/Check - plumber	A		P				P		P				
	Horiz Drains - Clean/Check - plumber	A		P				P		P				
	Back Flow preventers - inspect by BWSC	A												P
	Domestic Hotwater Sys - inspect.	M	P	P	P	P	P	P	P	P	P	P	P	P
32 - Vent. & AC	Domestic Hotwater Sys - inspect on LUI	A	Refer to LUI Schedule											
	Window A/C - Service	A		P										
33 - Roofs	Boiler Rm. Makeup Air Unit. -	A					P							
	Roofs - on inspections	W/Q	Weekly/Quarterly inspection - Laborers/JGs/RC/Mgrs/Supers should note any obvious problems and report immediately											
34 - Small	Roof - inspection following rainstorm	Q		P				P		P				
	Landscape Equip. (Nov. - March)	A		P										

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Dev #	Development Name
512	South Street

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Refer to Chapter in SOP Manual	Preventive Maintenance on Building Systems which includes: inspecting - Testing - Cleaning - Servicing - Repair - Replacement													
	Item:	Schd	Apr	May	June	July	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar
Equipment & Skid Loaders	Snow Removal Equip. (April - Oct.)	A					P		P					
	Skid Steel Ldr	A					P		P					
35 - Vehicles & Trucks	Pick-up / Truck	D	Daily/upon each use - Truck Driver is responsible for conducting a visual inspection and check fluid every time truck is fueled. At each re-fueling, complete the truck inspection checklist.											
	Pick-up Truck - by Garage	Q		P			P			P			P	
Refer to Chapter in SOP Manual	Regular Custodial Maintenance subject to Preventive Maintenance													
	Item:	Schd	Apr	May	June	July	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar
11 - B&G (And Ch. 37)	Weekly Walk Through	D/W	Daily/Weekly Laborers/JGs/RC shall conduct a visual inspection and report any problems immediately											
	Monthly Walk through by Supers/Managers	M	Refer to B&G Routine Inspection Schedule											
	Formal Qrtly. Insp. On B&G Inspections	Q	Refer to Formal Quarterly B&G Schedules											
12 - Hallway (and Ch. 37)	Weekly Walk Through	D/W	Daily/Weekly Laborers/JGs/RC shall conduct a visual inspection and report any problems immediately											
	Monthly Walk through by Supers/Managers	M	Refer to B&G Routine Inspection Schedule											
	Formal Qrtly. Insp. On B&G Inspections	Q	Refer to Formal Quarterly B&G Schedules											
14 - Snow Removal Plan (and Ch. 37)	Annual Plan	A							P					
	Snow Removal	AN								P	P	P	P	P
15 - Trash Removal (and Ch. 37)	Weekly Walk Through	D/W	Daily/Weekly Laborers/JGs/RC shall inspect & clean and report any problems immediately											
	Monthly Walk through by Supers/Managers	M	Refer to B&G Routine Inspection Schedule											
	Formal Qrtly. Insp. On B&G Inspections	Q	Refer to Formal Quarterly B&G Schedules											
	Annual Survey	A			P									
16 - Pest Management (And Ch. 37)	Annual Plan	A												P
	Inspect for Pest Activity during any inspection eg LUI Inspections and qrtly Inspections	W/Q/A	Daily/Weekly Laborers/JGs/RC shall report any pest activity immediately. Refer to B&G Inspection Schedule and LUI Inspection Schedule for Quarterly/Annual Inspections											
	Bait Storm Drains - to control West Nile Virus	A				P								
	IPM	as per plan	P	P	P	P	P	P	P	P	P	P	P	P
	Annual Landscape Maintenance Plan	A	Refer to Landscape Maintenance Calendar for Schedule											
	Spring Cleanup	A	Refer to Landscape Maintenance Calendar for Schedule											
	Mulching Planting areas	A	Refer to Landscape Maintenance Calendar for Schedule											
	Lawn Fertilization/Lime	A	Refer to Landscape Maintenance Calendar for Schedule											
	Lawn Weed Control	A	Refer to Landscape Maintenance Calendar for Schedule											
	Hardscape Weed Control	A & AN	Refer to Landscape Maintenance Calendar for Schedule											
	Lawn Grub Control	A/AN	Refer to Landscape Maintenance Calendar for Schedule											
	Lawn Aeration	A	Refer to Landscape Maintenance Calendar for Schedule											
	Lawn Overseeding	A	Refer to Landscape Maintenance Calendar for Schedule											

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PREVENTIVE MAINTENANCE SCHEDULE & REPORT FORM (PART 1 - BUILDING SYSTEMS)

Dev #	Development Name
512	South Street

Use P to denote when Task is Planned

Refer to Chapter in SOP Manual	Preventive Maintenance on Building Systems which includes: inspecting - Testing - Cleaning - Servicing - Repair - Replacement													
	Item:	Schd	Apr	May	June	July	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar
13 - Grounds & Landscape Care	Planting Bed Weed/Feed Control	W	Refer to Landscape Maintenance Calendar for Schedule											
	Planting Beed Weed Control	W	Refer to Landscape Maintenance Calendar for Schedule											
	Watering	W	Refer to Landscape Maintenance Calendar for Schedule											
	Lawn Mowing	W	Refer to Landscape Maintenance Calendar for Schedule											
	Fall Leaf Pick up & Removal	A	Refer to Landscape Maintenance Calendar for Schedule											
	Tree Inspections (with B&G Inspections)	W/Q	Daily/Weekly Laborers/JGs/RC shall conduct a visual inspection and report any problems immediately. Refer to B&G for formal quarterly inspection schedule											
	Tree Maintenance - as per plan	A & AN	Refer to Landscape Maintenance Calendar for Schedule											
	Shrub Inspection (with B&G Inspections)	W/Q	Daily/Weekly Laborers/JGs/RC shall conduct a visual inspection and report any problems immediately. Refer to B&G for formal quarterly inspection schedule											
	Shrub Maintenance - as per plan	A & AN	Refer to Landscape Maintenance Calendar for Schedule											
	Flower Planting	A or S	Refer to Landscape Maintenance Calendar for Schedule											
	Playground/Fence & Bench Inspect.	D/W	Daily/Weekly Laborers/JGs/RC shall conduct a visual inspection and report any problems immediately											
	Monthly Walk through by Supers/Managers	M	Refer to B&G Monthly Inspection Schedule											
	Replenish Fibar Mulch for playground surface	A/AN	Refer to Landscape Maintenance Calendar for Schedule											
	Thorough Playground Inspection before school vacation.	A	Refer to Landscape Maintenance Calendar for Schedule											
	Playground/Fence & Bench Formal Inspection (on B&G Inspections)	Q	Refer to Formal Quarterly B&G Schedules											

Heating System Description: Gas Fired System (Refer to SOP Manual Chapter 30)													
Task:	Schd	Apr	May	June	July	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar
Daily Service Activities	D	P	P	P	P	P	P	P	P	P	P	P	P
Weekly Service Activities	W	P	P	P	P	P	P	P	P	P	P	P	P
Feed Pump	M	P	P	P	P	P	P	P	P	P	P	P	P
Burner Motor	M	P	P	P	P	P	P	P	P	P	P	P	P
Air Handler	M	P	P	P	P	P	P	P	P	P	P	P	P
Circulating Pump	M	P	P	P	P	P	P	P	P	P	P	P	P
Annual Cleaning	A						P						
State Inspection	A						P						

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PREVENTIVE MAINTENANCE SCHEDULE & REPORT FORM (PART 1 - BUILDING SYSTEMS)

Dev #	Development Name
603	M.Powers

Use P to denote when Task is Planned

Refer to Chapter in SOP Manual	Preventive Maintenance on Building Systems which includes: Inspecting - Testing - Cleaning - Servicing - Repair - Replacement													
	Item:	Schd	Apr	May	June	July	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar
	Battery Lights, visual inspect.	W	Daily/Weekly Laborers/JGs/RC should note any obvious breakage and report immediately											
	Battery Lights Testing	M	P	P	P	P	P	P	P	P	P	P	P	P
	Battery Lights Testing (on B&G Inspections)	Q	Refer to your B&G Routine and Formal Inspection Schedules											
	Intercom Inspections on Annual LUI	A								P				
	Exterior Lights - visual inspect.	W	Daily/Weekly Laborers/JGs/RC should note any obvious problems and report immediately											
	Exterior Lights (on B&G Inspections)	Q			P			P			P			P
27 - Elevators	Elevators visual Inspect.	W	Daily/Weekly Laborers/JGs/RC should note any obvious breakage and report immediately											
	Elevators Service Contractor	M	P	P	P	P	P	P	P	P	P	P	P	P
	Elevator Inspection (on B&G Inspections)	Q	Refer to your B&G Routine and Formal Inspection Schedules											
	Elevators Service Contractor	A	P											
28 - Fire Safety Systems	Fire Alarm Sys - inspection	W	Daily/Weekly Laborers/JGs/RC/Mgr./Super must inspect master alarm panel check and report any problems immediately											
	Fire Alarm Sys. Service Contractor (and Inspect on B&G Inspections)	Q			P			P			P			P
	Extinguishers -visual inspect.	W	Daily/Weekly Laborers/JGs/RC/Mgr./Super must check fired extinguishers and report any problems immediately											
	Extinguishers (on B&G Inspections)	Q	Refer to B&G Schedule											
	Extinguishers serviced by outside contractor	A	P											
	Sprinkler Systems	W	Daily/Weekly Laborers/JGs/RC shall conduct a visual inspection and report any problems immediately											
	Sprinkler Systems Service Contract	A			P									
	Fire Pump Service Contractor	A			P									
	Smoke Detector-visual inspect.	W	Daily/Weekly Laborers/JGs/RC shall conduct a visual inspection and report any problems immediately											
	Smoke Detector in Common Areas Inspection (on B&G Inspections)	Q	Refer to B&G Schedule											
	Smoke Detector testing & battery replacement	A	Refer to LUI Schedule											

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Refer to Chapter in SOP Manual	Preventive Maintenance on Building Systems which includes: Inspecting - Testing - Cleaning - Servicing - Repair - Replacement													
	Item:	Schd	Apr	May	June	July	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar
29 - Generators	Generator Inspect	W	Weekly Mgr/Super is responsible for insuring that the Electrician performs weekly inspection and performs task on weekly service activity report.											
	Generator Inspect (on B&G Inspect)	Q	Refer to B&G Schedule											
	Generator Contractor Service	A			P									
31 - Plumbing	Water Distribution System Inspect	M	P	P	P	P	P	P	P	P	P	P	P	P
	Vertical Drains - Clean/Check - Plumber	A	P											
	Horiz Drains - Clean/Check - Plumber	A	P											
	Back Flow Preventers - Inspect by BWSC	A											P	
	Domestic Hotwater Sys - Inspect.	M	P	P	P	P	P	P	P	P	P	P	P	P
	Domestic Hotwater Sys - Inspect on LUI	A	Refer to LUI Schedule											
32 - Vent. & AC	Split System A/C - Service	A			P									
	Roof Top Exhaust Fan - Electrician	A	P											
33 - Roofs	Roofs - on Inspections	S	Weekly/Quarterly Inspection - Laborers/JGs/RC/Mgrs/Supers should note any obvious problems and report immediately											
	Roof - Inspection following rainstorm	Q			P			P			P			P
34 - Small Equipment & Skid Loaders	Landscape Equip. (Nov. - March)	A		P										
	Snow Removal Equip. (April - Oct.)	A	P											
	Skid Steel Ldr	T	P											
Refer to Chapter in SOP Manual	Regular Custodial Maintenance subject to Preventive Maintenance													
	Item:	Schd	Apr	May	June	July	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar
11 - B&G (And Ch. 37)	Weekly Walk Through	D/W	Daily/Weekly Laborers/JGs/RC shall conduct a visual inspection and report any problems immediately											
	Monthly Walk through by Supers/Managers	M	P	P	P	P	P	P	P	P	P	P	P	P
	Formal Qrtly. Insp. On B&G Inspections	Q			P			P			P			P
12 - Hallway (and Ch. 37)	Weekly Walk Through	D/W	P	P	P	P	P	P	P	P	P	P	P	P
	Monthly Walk through by Supers/Managers	M	P	P	P	P	P	P	P	P	P	P	P	P
	Formal Qrtly. Insp. On B&G Inspections	Q			P			P			P			P
14 - Snow Removal Plan (and Ch. 37)	Annual Plan	A							P					
	Snow Removal	AN								P	P	P	P	P
15 - Trash Removal (and Ch. 37)	Weekly Walk Through	D/W	P	P	P	P	P	P	P	P	P	P	P	P
	Monthly Walk through by Supers/Managers	M	P	P	P	P	P	P	P	P	P	P	P	P
	Formal Qrtly. Insp. On B&G Inspections	Q			P			P			P			P
	Annual Survey	A	P											
16 - Pest Management (And	Annual Plan	A	P											
	Inspect for Pest Activity during any inspection eg LUI Inspections and qrtly Inspections	W/Q/A	Daily/Weekly Laborers/JGs/RC shall report any pest activity immediately. Refer to B&G Inspection Schedule and LUI Inspection Schedule for Quarterly/Annual Inspections											

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603	M.Powers													

Refer to Chapter in SOP Manual	Preventive Maintenance on Building Systems which includes: Inspecting - Testing - Cleaning - Servicing - Repair - Replacement														
	Item:	Schd	Apr	May	June	July	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	
Management (Ch. 37)	Flush-Out (units that are not part of IPM Plan)	S													
	IPM	as per plan	P	P	P	P	P	P	P	P	P	P	P	P	
13 - Grounds & Landscape Care	Annual Landscape Maintenance Plan	A	P												
	Lawn Weed Control	A	Refer to Landscape Maintenance Calendar for Schedule												
	Hardscape Weed Control	A & AN	Refer to Landscape Maintenance Calendar for Schedule												
	Lawn Grub Control	A/AN	Refer to Landscape Maintenance Calendar for Schedule												
	Planting Beed Weed Control	W	Refer to Landscape Maintenance Calendar for Schedule												
	Watering	W	Refer to Landscape Maintenance Calendar for Schedule												
	Lawn Mowing	W	Refer to Landscape Maintenance Calendar for Schedule												
	Fall Leaf Pick up & Removal	A							P	P					
	Shrub Inspection (with B&G Inspections)	W/Q	Daily/Weekly Laborers/JGs/RC shall conduct a visual inspection and report any problems immediately. Refer to B&G for formal quarterly inspection schedule												
Monthly Walk through by Supers/Managers	M	Refer to B&G Monthly Inspection Schedule													

Heating System Description: Gas Fired System (Refer to SOP Manual Chapter 30)														
Task:	Schd	Apr	May	June	July	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	
Daily Service Activities	D	P	P	P	P	P	P	P	P	P	P	P	P	
Weekly Service Activities	W	P	P	P	P	P	P	P	P	P	P	P	P	
Feed Pump	M	P	P	P	P	P	P	P	P	P	P	P	P	
Burner Motor	M	P	P	P	P	P	P	P	P	P	P	P	P	
Air Handler	M	P	P	P	P	P	P	P	P	P	P	P	P	
Circulating Pump	M	P	P	P	P	P	P	P	P	P	P	P	P	
Annual Cleaning	A			P										
State Inspection	A				P									

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- Chapter 2: Maintenance Work Rules
- Chapter 3: Worker, Work Place and Resident Safety
- Chapter 4: Categories and priority of Maintenance Work
- Chapter 5: Stock and Inventory Systems
- Chapter 6: Maintenance at night and On Weekends
- Chapter 7: Major Emergencies Response
- Chapter 8: Hazardous Materials/Waste
- Chapter 9: Resident Installations

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- Chapter 11: Buildings and Grounds Inspections
- Chapter 12: Hallway and common area maintenance & cleaning standards
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- Chapter 18: Work order priorities and standards for turnaround times
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- Chapter 24: Development Systems Inventory, Work Stations, Schedules and Service Records
- Chapter 25: General Standards for maintenance of mechanical spaces
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- Chapter 29: Generators
- Chapter 30: Heating Systems
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PART ONE: GENERAL POLICY AND PROCEDURE

Chapter 1 Introduction

1.1 Purpose of this Manual

The purpose of this manual is to describe, in detail, how each of the Boston Housing Authority's site maintenance offices is to be established and managed. This manual sets standards, describes policies, and lays out the procedures that are to be followed at every maintenance office.

It is a common perception that maintenance is the simple part of a housing authority's work. Nothing could be further from the truth. To properly direct maintenance operations today, Superintendents need to:

- Be good supervisors of staff
- Have the judgment to be able to prioritize work appropriately
- Have a good basic understanding of all building materials and systems
- Have a good basic understanding of grounds care and landscaping
- Know how to manage in an emergency
- Be able to work on computerized data collection systems
- Be able to understand and manage a preventive maintenance program
- Be capable of managing the paperwork involved in tracking not only work orders, but staff time, procurement, preventive maintenance records and other items
- Be able to manage scarce resources and still accomplish the work to be done
- And have a myriad of other skills

In the past, little overall direction has been given to maintenance superintendents, and this has resulted in superintendents having to create their own management systems. The result is 20 different systems in 20 different offices.

This manual was put together by a group of maintenance superintendents, managers and other staff in 2001. It has been revised in 2004 and again, in 2013-14 to account for changes in systems and to integrate all maintenance policies into this one manual. Documents no longer in use, but instead included in this manual, include the Living Unit Inspection Manual, the Preventive Maintenance Manual, and the Work Order Manual (except for CCS/Elite portion of work order manual).

At the same time there continues to be a number of reference documents – such as the Landscape Manual, the CCS Work Order Manual (Elite Work Order Manual coming soon), material put out by the Risk Management Department, and other documents which should be kept in maintenance shops and used as additional guidance for maintenance activities.

1.2 Lines of Authority and Responsibility

Maintenance of each family site is the responsibility of the Management of that site. The Housing Manager in charge has key responsibility but most of the work is delegated to the Maintenance Superintendent(s). The staff at each site is assisted by technical staff from the Central Services Department and supported by Program Maintenance Supervisors. However, *ultimate responsibility for maintenance at each site lies with the site Manager and Superintendent.*

This is a very important concept that Managers and Superintendents alike need to understand. You may rely on the Heating System Coordinator to do certain types of work in the boiler room, but the ultimate responsibility is not his, but the site staff's. You may expect that the Building Maintenance Manager and Service Program Coordinator will assist you with obtaining new dumpsters, or insuring that they get picked

up on time, but ultimately, trash removal is your responsibility. You may ask the Program Maintenance Supervisor to assist in finding contractors and/or staff to deal with an emergency, but the site staff is ultimately responsible for insuring the work is done properly and in a timely way.

This is not to say that these other members of the Central Services team are not important, or will not be expected to do their jobs. But it is to say that when there is a problem, it is the site staff that must take the responsibility for insuring that the work is done.

1.3 Standards for Cleanliness and Order

Although standards will run throughout this manual, the standard for cleanliness and order needs to be emphasized from the start.

Very often, maintenance offices are not given the kind of attention that other parts of BHA's operation are in regard to cleanliness and order. Furniture is often old and in disrepair; bathrooms are not maintained in sanitary order; supplies, stock and equipment are left all over; dusting, floor sweeping and washing are not done; floors and walls are not repainted periodically to maintain a clean image.

The minimum standards (established in 2001) listed below must be maintained at all times:

- All floors and walls shall be freshly painted and clean at all times
- Windows will be washed at all times
- Stock will be put away upon receipt – not left in corridors or offices
- Broken down furniture will be replaced with decent furniture – not necessarily new, but in good repair
- Lunch rooms will be appropriately furnished with a table and chairs
- Bathrooms will be painted and clean at all times and stocked with paper products
- Equipment will be properly tagged, cleaned after use and stored at all times
- Stock areas will have shelving, bins, and other appropriate storage furniture to insure that stock is neatly stowed away at all times
- Every worker will have a private locker, to which he/she may attach a lock if desired

In short, we expect that maintenance areas will look like Professional Maintenance Operations. Not as a one shot deal, but at all times.

1.4 How this Manual is organized

This Manual is organized into four parts each part containing chapters. In this revised version of the Standard Operating Procedures for Maintenance [SOP] Manual, we have organized the parts generally in accordance with the major types of maintenance work. Each part begins with a chapter providing a general introduction to the topics, standards and expectations, how to create regular schedules, and tracking and reporting on activities performed.

Appendices to this SOP Manual have been set up on the FamEld S:Drive on your computer. These appendices are organized into two main folders and are labeled *SOP Appendices* and *SOP Master Building Systems Appendices*. Both of these appendix folders are further sub-divided into sub-folders.

In addition, on the FamEld S:Drive there is another folder labeled *SOP Profile and Building Systems by Development*. How these folders are set up is explained in more detail at the end of this Chapter.

Part One: Introduction

Included in this part are the policies and procedures that impact overall operations of maintenance. These include Maintenance Work Rules, Worker, Work Place and Resident Safety, Categories and Priorities for

Maintenance Work, Stock and Inventory Systems, Maintenance at Night and on Weekends, Major Emergency Response, and Hazardous Materials.

Part Two: Regular Custodial, Landscape and Pest Management Maintenance

This part contains information of the day to day work required to maintain a clean, pest-free, safe and attractive housing development. Chapters are included on Building and Grounds Inspections, Hallway and Common Area Maintenance and Cleaning, Grounds and Landscape Care, Snow Removal, Trash Removal, Pest Management and Mold and Mildew.

Part Three: Management of Repairs and Work Orders

This part describes the day to day work of performing living unit inspections, turning over vacancies, responding to resident initiated or inspector initiated repair requests, work order priorities, standards for turnaround time, managing and scheduling work orders, and the inspect and repair program.

Part Four: Preventive Maintenance

This part replaces the previously issued (in 1999) preventive maintenance manual. That manual was designed for customization by each development. This new part provides information on requirements and standards for all systems, and provides instructions for creating development-specific Profiles and Systems Inventories. In addition, this part contains chapters on scheduling, tracking and reporting and creating and maintaining annual service record books, as has been required since 1999. Preventive maintenance deals primarily with building systems such as heat, electrical, plumbing, fire safety systems, etc., but also includes equipment, vehicles, roofs and aspects of regular custodial maintenance.

Appendices to this Manual: SOP Appendices and SOP Master Building Systems Appendices

SOP Appendices:

The general appendices to this manual are located on the FamEld S:Drive, in the folder labeled **SOP Appendices**. This main folder is divided into 37 sub-folders; each sub-folder contains individual appendix files and corresponds to each of the 37 Chapters in this Manual. These appendix files contain additional information supplementing this manual such as policies, sample master order forms, resident notifications, sample warning letters, vendor listings, request for quotation bid/specification packages for procuring services from outside contractor, landscape service rendered reports, pest control record forms, equipment specifications etc. Not all sub-folders will contain information at this time, further information may be added at a later date and all appendices are subject to change, as information is updated.

SOP Master Building Systems Appendices

Each Development will be required to establish a *Development Profile and Systems Inventory Book* describing all of the buildings, systems, equipment, and preventive maintenance plans of the individual site. All master forms, checklists, specification sheets, inspection forms, planning and reporting forms, and other information is contained on the FamEld S:Drive, in the folder labeled **SOP Master Building Systems Appendices**. The SOP Master Building Systems appendices main folder is divided into sub-folders, these sub-folders are labeled to correspond with the Chapters from Part 4 - Preventive Maintenance part of this manual. These sub-folders

contain master forms, checklists and specification sheets required to set up a Profiles and Systems Inventory binder for your Development. These sub-folders will also contain calendars, inspection forms, planning and reporting forms, and other relevant information to assist you in creating an annual preventive maintenance plan, track and maintain service records.

Our goal is to format a *Development Profile and Building System Folder* on the FamEld S:Drive for every Development. These folders will contain inventory, specifications and warranty information etc specific to each building structure, system and component at each development. This initiative is a *work-in-progress* and is discussed in more detail in Part 4.

Chapter 2 Maintenance Work Rules

Please note: Any conflicts between the language in this section and any contracts between the BHA and its Labor unions shall be resolved in favor of the contract language.

2.1 Daily Routine

All maintenance personnel must be in full uniform and ready to work upon sign-in.

Development Maintenance Staff

Start- 8:00 AM

All employees must be ready to start work at 8:00 a.m. and record actual time. Employees will be docked for lost time.

Break- 10:00 – 10:15

Employees must remain on site

Lunch- 12:00 – 12:30 (10 min. wash up allowed)

Employees must report to maintenance to sign out and in after lunch. Superintendents will collect all work orders from trades at the beginning of the lunch break, whether completed or not, and assign afternoon work at the end of the lunch break.

Break- 2:00 – 2:15

Employees must remain on site

Finish- 4:30 (10 min wash up)

Trades staff must report back to maintenance at 4:00. At this time paper work should be turned in to your supervisor, again whether completed or not, any problems or issues should be reported, and then employees may wash up to leave. Laborer's and janitor groundskeepers must report back to maintenance at 4:15 to wash up and sign out.

The hours of work above should be posted at each office.

2.2 Sick Time

Employees calling in sick must do so within the first hour of the day, i.e. before 9:00 a.m. and speak with a supervisor to be allowed to use a sick day. It is the employee's responsibility to have the correct phone number to reach a supervisor. If the employee does not call by 9:00 a.m. they will be considered absent, receive no pay for the day, and are subject to disciplinary action. If the maintenance superintendent is not available the manager must be contacted by 9:15 a.m. The employee him/herself should call rather than a family member whenever possible. Contractually, trades and laborers must bring in a doctor's letter when they have taken 5 or more sick days. A letter can be requested when patterned or excessive sick time is used by an employee. That is up to the discretion of their supervisor(s). This is subject to change as is all of the language in the union contracts.

2.3 Personal Time

Employees wishing to use a single vacation or personal day must request it in writing at least 24 hours in advance. Prior approval is required. This policy may be waived in the case of personal emergencies when advance notice is not possible (at the discretion of the supervisor).

2.4 Vacation

Requests for vacations of more than one day should be submitted to the supervisor in writing at least two weeks, and as long as possible, prior to the start date of the request. The Superintendent shall forward all requests to the Manager indicating approval or disapproval. If disapproved, the reason for disapproval shall be indicated.

Requests for vacations for more than one day for trades must be approved by the Assistant Director of Property Management or Program Maintenance Supervisor.

Advance pay for vacations cannot be granted without at least two weeks notice to the Payroll department.

Request for summer vacations should be turned in by May 1, and winter vacations by October 1, even if the request is tentative. Written vacation requests are not approved until the employee receives a returned copy with all appropriate signatures on it. The superintendent should return all approved vacation requests in a timely manner so employees can make necessary plans.

Requests for any day adjacent to a holiday, such as the Friday after Thanksgiving, must be submitted at least one month in advance to insure adequate coverage.

To ensure proper coverage it is preferred that vacations be taken for no more than 2 weeks at a time, with a maximum of 3 weeks. The Director of Property Management or Director of Building Services must sign off any requests greater than 3 weeks.

All Maintenance offices shall post all scheduled vacations at all times using a visible board so that both supervisors and fellow workers know what vacations are planned or in progress. Program Maintenance Supervisors will post a vacation schedule for all regional tradespersons.

Superintendents and managers should review time usage reports supplied by the BHA's Payroll Department periodically to remind employees of the need to use personal and/or vacation accruals.

2.5 Bereavement

Bereavement leave is granted with pay upon the death of family members. Contracts allow one to four days of bereavement time depending on the relationship of the employee to the deceased. For specific information on each contract's definitions of immediate family and other family members, and how to provide bereavement leave, check the BHA Intranet site, under Human Resources.

2.6 Use of Personal Vehicles/Local Travel Reimbursement

The BHA reimburses staff who uses their own vehicles to travel between sites at the mileage rate permitted by HUD. This does not include travel to and from work. Tolls are also an allowed expense; parking usually is not an allowed expense. Employees who travel on the bus/subway system to travel between sites may also be reimbursed for the cost of that travel. Travel reimbursement requests are completed on a Local

Travel Expense form (obtainable on the Intranet or from Accounts Payable). Supervisors must approve payment of travel expenses prior to sending the form to Payroll for payment.

2.7 Uniforms and Equipment

2.7.1 Uniforms

Every employee is required to report to work everyday in full uniform. Laborers and Janitor/groundskeepers and trades employees are all required to wear BHA uniforms. The uniform consists of a BHA shirt, coat, blue jeans or blue work pants, and work boots. Sneakers are never permitted on the work site. Any employee who requests a medical exemption from the work boot rule must provide medical documentation. This documentation must be reviewed by the ADPM and forwarded to the Risk Management and Human Resources Departments for reasonable accommodation consideration. The Reasonable Accommodation form for employees can be found in the SOP appendices, Chapter 2 Work Rules.

If the employee wishes to wear a hat it must be a BHA hat, supplied by maintenance, or an appropriate navy blue hat not issued by BHA

The BHA identification badge is part of the uniform and must be displayed at all times by all employees.

The quantities and types of uniforms are contractual and subject to change. The contracts now read: **Laborers, Janitor Groundskeepers, Crew Leaders and Special Assignment Laborers** receive yearly, four uniform shirts (2 long sleeve and 2 short sleeve), 4 T-shirts, one sweatshirt and rain gear. Every other year they will receive one uniform jacket. They are required to wear pants that are dark blue in color and can wear knee length dark blue shorts as long as they are not performing safety sensitive duties. Pants and shorts are not provided by the Boston Housing Authority.

Tradesmen receive yearly, six uniform shirts (they can choose the combination of shirts available – long sleeve, short sleeve or T-shirts) and three pairs of dark blue pants. White painter pants for painters and plasterers are available. One winter weight uniform jacket will be issued once every other year.

All employees who are issued uniforms are responsible for their care, cleaning and maintenance.

2.7.2 BHA Issued Equipment

Communication devices (pager, radio, cell phone, blackberry....) issued to employees must be kept on and with the employee during working hours. These will be picked up at the maintenance office when the employee signs in and returned at the end of the day.

Any employee issued a device who chooses to take it home must keep it on 24 hours a day. Employees are responsible for insuring that all devices are in good working condition at all times and for reporting any problems with equipment immediately to his/her supervisor. This rule may be modified by a supervisor for roving craftsmen who do not report back to the same maintenance office at the end of each day.

This section does not apply to those supervisory and other personnel who are required to keep devices on at all times unless when on leave. Refer to Chapter 6 for more information on those requirements.

Any employee that fails to adhere to these rules will be subject to disciplinary action.

2.8 Lost Time Reports

The maintenance supervisor shall maintain a lost time calendar for each employee at the start of each calendar year and shall record all lost time on the calendar when completing time sheets at the end of each

week. Lost time reports shall be maintained in a central location for the duration of the year then filed in the employee's file at the end of the year when a new calendar is set up. The calendar shall note each day or portion of a day that an employee is absent, using the codes provided. These calendars shall be reviewed periodically to establish whether or not there is excessive use of sick time or a pattern of before/after weekend and holiday sick time use. A new calendar shall be set up each January 1.

2.9 Payroll

The maintenance superintendent is responsible for maintaining time sheets and over-time slips in the office for each worker on the staff. Staff shall accurately complete time sheets on a daily basis for review by the superintendent. The superintendent shall review all time sheets at the end of each week for accuracy and sign them for submission to payroll. Time sheets are due in payroll at 12:00 noon each Monday. When there is a Monday holiday, time sheets are due in payroll at noon the previous Friday. The Maintenance Superintendent must e-mail payroll if any one is sick or out on Friday, after timesheets were put in. Floaters' timesheets must be initialed daily by Maintenance Superintendent or Manager at each site.

Overtime slips should be promptly processed with each payroll, including all required signatures (superintendent or manager plus assistant director or regional).

Payroll may be picked up at the Central office any time after 9:00 a.m. each pay day. It is advised that one truck driver from each region pick up payroll and distribute appropriately within the region. Payroll may not be distributed prior to 12:00 noon on paydays.

The Manager must sign off superintendents' time sheets.

2.10 Overtime slips for ERS duty or call-back

Staff, who works overtime on weekends or holidays, must ensure that they complete overtime slips properly. The overtime slip must accurately report stand-by time, that is time prior to reporting to the ERS office or to the first work order site and is recorded as 999 on the overtime slip. The time recorded for completion of each individual work order must be the actual time it took to perform that work order, including travel time to the site. All other time (time other than time spent doing work orders or traveling) must be recorded as 777 time.

Call back time slips must be similarly completed so that time spent on individual work orders is accurately reported. Staff called back in, receive a minimum pay of 4 hours of straight time; thus if the work took an hour, the staff will receive four hours of straight time pay. If the work took three hours the staff person will receive three hours at time and a half, or double time, depending upon the day (Saturday, Sunday or Holiday) worked.

2.11 Customer Service Protocols

The BHA has established customer service protocols for all staff to follow. The phone protocol is:

"Good morning (afternoon). Old Colony Maintenance. How may I help you?" All staff who answers the phones should be reminded of this. Even more important than the words is the tone of voice used; employees should be reminded that the tone must always be cordial, and project the feeling that they are ready to assist the caller at all times.

2.12 Communications with Staff

As the BHA begins to rely more and more heavily upon e-mail and other forms of electronic communication, all supervisors need to be mindful of those employees who do not receive e-mail. Therefore, all offices must have a combination of the following forms of communication in regular use:

Bulletin Board: There should be an employee bulletin board on which all communications of an authority wide nature is posted. This includes job postings, announcements of deaths, announcements of parties or other BHA events that staff may wish to participate in, the Monday BHA Bulletin, and other items. The bulletin board should be located in an area easily accessible to all staff and updated regularly. Equal opportunity employment and workers compensation posters are required at all sites.

Bins or clip boards for each staff person: Each staff member should be provided with a clipboard or a bin or tray for placement of personal mail and messages. For some items, such as the bi-monthly newsletter that is printed in enough quantity for all staff, one of each copied item should be placed in the appropriate employee bin or clipboard.

Staff meetings: It is appropriate – and desirable – to hold regular staff meetings with all employees to keep them up to date on BHA-wide or development issues. This is especially important when you are starting a new initiative that involves all or most of the staff. For instance, you may want to hold a meeting with all staff as you start off a project to clean out basements. By having a meeting, you can insure that all of the staff hear the same message directly from you – not filtered or modified as it passes through one staff member after another. Just as importantly, having a meeting gives you the opportunity to get everyone's ideas on how to make the project or initiative successful – and the more ideas you get the better. These meetings do not have to be very long, and should be held at a time when it is least disruptive to your work – such as first thing in the morning, or right before or after lunch.

2.13 Phone Use

Use of BHA telephones for personal purposes is permitted for brief calls (five minutes or less) or in the case of an emergency. The cost of any personal use of cell phones or any long distance calls on regular phones must be reimbursed to the BHA.

2.14 Disciplinary Process

The disciplinary process is used when an employee's performance does not meet expectations. Usually, this process is the result of a pattern of problems with an employee – such as tardiness – but sometimes occurs as the result of a problem which occurs suddenly and not necessarily as a pattern, such as insubordination or failing to call in when absent. As a general rule, the purpose of the disciplinary process is to put an employee on notice about the problem so that they may correct it. The progressive aspect of discipline is only used when the first step or steps fail to rectify the problem behavior in question.

The following procedures have been established for use by Operations supervisory staff. Please note that all correspondence regarding performance problems must be clear and specific.

NOTE: All new employees are placed on 6-month probation. Progressive discipline is not required. During the probationary period no reason needs to be given to terminate employment. The recommendation to terminate to Human Resources must be signed by the Assistant Director of Property Management.

Authority – All supervisors have the authority, on their own, to give verbal and written warnings and written reprimands. However, it is expected that any time an issue with an employee is serious enough to warrant any of these actions, that the supervisor is discussing the issue and the warnings with their supervisor (i.e. maintenance superintendents with managers and managers with regional managers). Assistant Directors of

Property Management must approve all recommendations for suspensions. The Director of Property Management must approve all recommendations to terminate employees (not including probationary employees).

Verbal Warning – A verbal warning is just that – a conversation in which the words “this is a verbal warning” are used. When giving a verbal warning, clearly state the expectation that was not met (i.e. tardiness) and what needs to be done to correct the problem (get to work on time every day). Make a record of the verbal warning by writing a note or memo to the file. The employee may be given a copy of this record if they request it. The record of a verbal warning is not sent to Human resources or to supervisors, but maintained in the employee’s site folder.

Written Warning - A written warning must include the statement “written warning” and must include this line at end: "Continued problems in performance may lead to additional disciplinary action, including suspension or termination." Written warnings must be copied to the Director of Human Resources, to the next higher level supervisor, and to the appropriate Union representative. Written warnings should be clear as to the behavior(s) which are the problem and what must be done to correct the behavior.

A list of all union representatives can be found in the Human Resources Public Folder in Outlook and on the Intranet. Copies of written warnings and reprimands to members of the trades unions are sent to the individual union business agent.

Suspensions – If any supervisor proposes to suspend an employee a memo should be prepared to the Assistant Director of Property Management, stating the reasons for the recommendation, the length of suspension recommended and all back up material (copies of prior warnings, etc). The Assistant Director of Property Management will in turn sign off if appropriate and send it on to the Director of Human Resources as a recommendation, unless there is a disagreement, in which case the Assistant Director of Property Management will work with the manager to resolve it. The Director of Human Resources will prepare the actual suspension memorandums and assist the manager/assistant director in carrying out the actual suspension.

Terminations – Use the same process as noted above for suspensions, except that an additional sign off is required from the Director of Property Management. No termination recommendations (except during probationary periods) should be made unless the Director of Property Management has been made aware of the progress of discipline as it went forward.

Exceptions – The above procedures will apply to most disciplinary actions. In certain unusual and extremely serious cases, steps in this process may be skipped. These are unusual circumstances and the Director of Property Management should be immediately made aware of any circumstance for which a suspension or termination is being recommended. In these circumstances, we will work together and with Human Resources to determine the appropriate steps to take.

2.15 Working with Union Representatives

Almost all BHA employees, including Maintenance Superintendents and Managers, are represented through collective bargaining with one or another unions. Each contract has various provisions regarding work rules and the conduct of work. Within the Operations Department, we work with three unions:

Teamsters:

Managers, Superintendents, all white-collar office workers, and resident custodians (elderly division only) and public safety officers.

Laborers

Laborers, Janitor/Groundskeepers, Special Assignment Laborers, Crew Leaders, Appliance men, and garage mechanics.

Boston Building Trades Council (BTC)

All trades workers/mechanics - plumbers, electricians, carpenters, plasterers, etc. These employees belong to the union which represents their particular trade; however, the BHA's agreement is with the BTC, which represents all trades workers at the BHA.

2.16 Issues in the Field

Shop stewards and business agents can not be permitted to halt work in progress. If an employee disagrees with an assignment or any other aspect of the work, he or she is to perform the task and grieve it after the work is done. If we stop work each time in order to negotiate the resolution, the work will never get done. These issues can be worked out after the fact through grievances and/or negotiations to establish future protocols. The only exception to a person not performing the work as instructed is in cases where the employee legitimately feels there is a safety risk involved. It is our expectation that supervisors will not request employees to get involved in situations that put them at risk. Risks may include physical risks due to the physical conditions or the work site or safety risks due to the presence of a dog or concerns about the behavior of particular residents or guests.

2.17 Appendices to Chapter 2

Appendices to this Chapter can be obtained on the Fam/Eld S:Drive in the folder labeled **SOP Appendices**, in the sub-folder labeled **Chapter 02 – Work Rules**. Appendices include vacation schedule forms; sample warning letters; discipline action approval memos; leave requests; annual leave charts etc

Note: appendices are subject to addition and change at any time.

Chapter 3 Worker/Work Place Safety and Precautions and Resident Safety

It is critical that Property Managers, superintendents and all staff remain alert to safety precautions at work at all times. Lost time due to injuries is a serious problem for any employer, and has enormous impact on the services we provide. And, of course, we do not like to see anyone hurt. It is important to hold regular safety reviews with staff either at special staff meetings or regular staff meetings and encourage staff to join and actively participate in the Risk Control Committees set up throughout the Authority.

3.1 Personal Safety Clothing & Accessories

Except for work boots, which are the obligation of the employee, Managers and Superintendents must insure that the following items are available to workers at all times:

Protective Eyewear: **Safety Glasses** and **goggles** must be worn when working with power equipment, using power tools, chemicals, solvents, other hazardous materials, in construction areas, in basements or closed or confined spaces, when removing/scraping paint, tiles or other loose debris and when disposing of debris into dumpsters. Safety Goggles are to be worn when using high-powered tools such as table saws, high-speed power drills, miter saws, lawnmowers and line trimmers. **Face shields** must be worn when working on plumbing and pipes, when using cutting torches or welding equipment and when using chain saws and power pole pruners.

Respirators: **Paper mask respirators** should be worn when working in areas with light dust and cleaning out vacant units. **N-95** respirators should be provided when performing lead safe practices (see Ch. 8 – Haz Mat for information regarding the Renovate, Repair and Painting Rule). **Half-mask respirators** should be worn when working in areas where there are heavy concentrations of dust, areas that may contain asbestos or lead, areas contaminated by rodents or insects, and while cleaning out basements following plumbing backups, performing mold remediation or similar type of work. **Full-face respirators** should be worn when applying spray paint, oil based paints, hazardous chemicals, pesticides, herbicides, stain kill and can be used when working in areas containing exposed lead or in areas containing asbestos. Full face, half face and N-95 respirators must be fitted properly before an employee can be assigned a respirator. Managers and Superintendents should ensure that each employee has been fit-tested and provides a copy of the results to them to keep in their files. Managers and Superintendents must also keep on hand an ample supply of cartridges for use by employees. Asbestos type Hepa filters are P-100 and oil/vapor cartridges are 6200.

Gloves: Depending on the task being performed, there are a number of different gloves that can be worn. Employees should whenever possible use **Nitrile gloves** when doing general cleanups, working on plumbing backups, working on any plumbing or water related issue, working with chemicals or solvents. When performing other tasks such as cleaning out vacant apartments, picking up trash, and spring-clean ups around the development, you should use **puncture resistant gloves**, which have been provided by the Risk Management Department in the past. Future procurement for these gloves must be done through Central Stores or by a site manager.

Work Boots: Work boots are required apparel for all Resident Custodians, Laborers, Janitor Groundskeepers, Special Assignment Laborers, Mechanics, Superintendents and PMSs. All permanent employees in the above named categories receive an annual boot allowance. Individuals who come to work in foot apparel other than work boots must bring a letter from a certified medical doctor. All exceptions to the work boot rule must be approved by using the Reasonable Accommodation process.

3.2 Hazards in the Workplace

There are many areas where hazards exist. Custodial/Maintenance positions are the most susceptible to injury since they require physical labor but there are situations, which affect the managerial staff as well. Managers and superintendents must be aware of how staff handles equipment, the manner in which rubbish is removed, the handling, transportation and storage of flammable materials, and proper procedures while conducting routine tasks. Whenever a safety question arises, they are to be referred to the Assistant Director of Property Management, Regional Property Managers, Program Maintenance Supervisor or the Risk Management Department.

Important tips include the following: (There are many, many other ideas that can be added – this is not a complete list!)

- Elimination of tripping hazards on grounds and in common hallways and other areas, including properly storing all equipment and supplies. Use proper care when using extension cords, hoses, etc., so as not to create tripping hazards
- Immediate cleanup of all spills to avoid slip and fall hazards
- Maintenance of clean and well ventilated shops
- Excellent snow and ice removal activities
- Removal of barriers in common hallways and stair halls
- Insure that eye wash stations are operable and not blocked at all times
- Insure that first aid kits and burn kits are readily available and full at all times and contents have not surpassed their expiration dates.
- Insure that portable eye wash stations have sufficient amount of solutions and that the solutions have not surpassed their expiration dates
- Insure that all employees using power equipment are properly trained in their use
- Insure that all employees using power equipment are wearing appropriate protective eyewear and clothing
- Insure that all equipment is in good condition, including such items as ladders
- Clearly mark low pipes and other intrusion hazards for clear visibility
- Insulate heating and hot water pipes in work areas
- Have Pest Control Contractor inspect and treat if necessary all basements including storage areas, boiler rooms and utility rooms.
- Insure that basements and crawl spaces are well lit, using temporary lighting strings if required and check for other hazards in basements regularly
- When work in crawl spaces is required, have two workers available (one within talking distance at the end of the crawl space or working with walkie-talkies).
- When working with open flame (i.e. welding, burning, cutting, etc.), a fire watch, i.e. laborer/J.G., dedicated solely to look out and control stray fires with a fire extinguisher, should be assigned to the employee performing the open flame work.

3.3 Materials Handling Injury Prevention

Every year the major cause of work related injuries at the Boston Housing Authority are related to materials handling. The two most common types of injuries are knee and shoulder injuries. As stated previously, Property Managers and Maintenance Supervisors should encourage staff who are required to lift heavy objects such as appliances, 5 gallon cans of paint, boxes of floor tiles etc., to seek help and use proper methods of lifting. The use of equipment such as hand trucks, tailgate lifts, forklifts and storing materials wherever possible at waist height will prevent materials handling injuries. The best way to prevent any injury is training and awareness.

3.4 Training and Reminders

One of the best methods of avoiding injury is to regularly remind employees of the risks and best methods to avoid injury. It is important for managers and superintendents to allow appropriate time for employee safety training and to encourage the use of personal safety equipment and proper tools and equipment to move and store materials. The Risk Management Department is a resource center that is available to provide safety training, pamphlets, CD-ROMs, videos and other materials to aid in the training of employees.

The Risk Management Department conducts safety training as needed.. It is important that employees attend the sessions. Certain training sessions, such as respirator fit testing, lock out/ tag out for electricians and sessions relating to the proper use of personal protection safety equipment are required by Massachusetts and Federal Law, namely OSHA.

It is important for managers and supervisors to make sure employees are given basic training on power equipment or power hand tools if necessary, before they are assigned these items to use.

3.5 Risk Control Committees

Risk Control Committees are comprised of employees from different occupations within a Region. Managers/Management Aides, Superintendents, Laborers and Mechanics should be represented on each Regional Committee. The Risk Management Department coordinates the committees and suggests topics to be discussed. Assistant Directors of Property Management assign employees to the committees and excuse them from regular responsibilities in order to attend meetings. Risk Control Committee members discuss safety concerns, needs for training and equipment and receive loss information from the Risk Management Department.

The committees are an important and integral part of safety and loss prevention at the Authority. The meetings are held quarterly with meeting notes being posted at the various developments so that employees can see firsthand what efforts are being made in the area of safety.

3.6 Reporting Injuries and Accident Investigation

When a new employee is hired, they are required to attend an orientation session which is where they receive information on how to report injuries and safety concerns.

ALL INJURIES, NO MATTER HOW SMALL, MUST BE REPORTED AND REPORTED IMMEDIATELY.

This is an important rule and all staff must be made aware of it. The BHA has a consistent problem with late reporting of injuries. While managers and superintendents are reasonably good at completing forms and submitting them right away, not all employees report their injuries right away. It is extremely important that employees be regularly reminded to do this, even if the injury seems very minor at the time and does not lead to time off.

It is also important to note that if an employee has an accident, and he/she needs to leave the site to see a medical professional, and he/she does it on the day of the injury, the remainder of the day is paid as if they worked. If, however, they delay this until the next day or later, that time must be paid as sick time until the issues are resolved with Risk Management.

To report an on the job injury, complete a “**Employer’s First Report of Injury” Form 101** (Commonwealth of Massachusetts state mandated form), which is located in the “All You Need to Know About Handling On-the-Job Injuries” publication, it is also available on the BHA Intranet site and the Fam/Eld S-Drive, SOP

Appendices. The First Report of Injury Form 101 is located in section 2 of the manual and must be completed by a manager or superintendent and sent to the Risk Management Department within 48 hours of the injury, if possible. The completed form should be faxed (X4293) or e-mailed to Risk Management with a hard copy sent by inter-office mail. A copy must be kept in the management office.

The First Report of Injury Form 101 instructions is included in section 2. The form is mandated by the Commonwealth of Massachusetts and all of the information is necessary. It is very important to include up to-date and valid telephone numbers and addresses for the injured employee.

Accident Investigation Forms located in section 3 of the manual must be completed following each work related injury claim. The original must be kept in a file in the maintenance supervisor or manager's office and a copy should be faxed to Risk Management at 4293 and sent inter-office mail. The form designed by the Safety Manager for the BHA complies with all state and OSHA requirements for investigation or work related accidents and thus must be completed with 72 hours of a work related accident.

Employee Report of Occupational Injury or Accident Form not in the manual but in the Fam/Eld S:Drive, SOP Appendices, Ch 3 – Safety, is a new form as of 2014 and must be filled out by the employee who was injured or in the accident within 24 hours of the date of the work related injury. Please forward the completed form to the Risk Management Department.

Employee's Safety Orientation Sheet located in section 4 of the Risk Management manual should be completed for each employee and a copy sent to the Risk Management Department. The form contains a checklist of personal protection safety equipment and for the Employee Safety Handbook that needs to be completed and signed by the employee when they are assigned the equipment and the Handbook. The form should be completed for all employees no matter what their status.

3.7 Employee Safety Handbook

The safety rules above are in conjunction with the rules and regulations found in the Employee Safety Handbook. The Employee Safety Handbook was designed as an information tool for both employees and management. This Risk Management publication was distributed to employees when it was originally created. Copies may be available from the Risk Management Department and can be duplicated from copies already in the field.

The Safety Handbook contains information regarding the use of personal protection safety equipment, proper techniques for moving stock and inventory, discusses the proper type of clothing an employee should be wearing, boiler room and shop safety tips and requirements and storage of hazardous materials on BHA property. The Handbook also contains the rights and responsibilities for employees and management with regard to what happens if an employee sustains a work related injury.

3.8 Licensing

The BHA requires that employees who perform certain tasks to be licensed with the Commonwealth of Massachusetts. Those employees should be aware that some of these licenses require continuing education credits to maintain the license:

- **Motor Vehicles**-all employees who operate a BHA motor vehicle must possess a valid driver's license issued by the Commonwealth of Massachusetts or another US State or Territory. **See Chapter 35** for the licensing requirement, maintenance and operations of BHA vehicles.
- **Hoisting Licenses**-all employees who will be operating skid steer loaders (Bobcat) must be properly licensed. **See Chapter 34 and corresponding sub-folder in the SOP appendices main folder on the Fam/Eld S:Drive** for details regarding getting licensed, information on training, operation and maintenance of the skid steer loaders.

- **Pesticide Applicators**-all employees who will be performing pesticide applications for West Nile Virus treatments and weed control on BHA property must be duly licensed. **See Chapter 16 and corresponding sub-folder in the SOP appendices main folder on the Fam/Eld S:Drive**, for licensing requirements.
- All employees who work on boilers or heating plant equipment must provide proof of state required licenses.
- And Plumbers, Electricians, Pipe Fitters, Boiler Technicians, and Refrigeration/Air Conditioning Mechanics must be licensed per union contractual obligations.

Many licenses require continuing education units to maintain the license such as the pesticide applicators license, 6 CEUs every 3 years, and the hoisting license, 4 CEUs for each license grade every two years.

3.9 Storage of Flammable Materials

Storage of Equipment and Gas:

Managers and Supervisors should instruct all employees to follow proper procedures in the storage and handling of liquid flammable materials such as gasoline and diesel fuel. The BHA constructed hazardous material containment sheds throughout the Authority. The containers are for the storage of power equipment including gasoline, oil, paint thinners, and in some cases skid steer loaders. They were not designed to house windows, doors, appliance or other type of stock inventory. The following rules should be kept in mind:

- Store equipment in designated areas only.
- Place all gas cans, gas/oil mix and starter fluids inside certified fire protection cabinet.
- Never hang weed trimmers or leaf blowers from steam and hot water pipes and natural gas lines.
- Make sure you remove spark plug wire when putting equipment away or when employee is working on a piece of equipment.
- During winter months make sure all equipment except snow blowers have all petroleum products drained and the equipment serviced for the following year.
- Gasoline or other flammables shall not be stored in occupied residential buildings
- See Chapter 34 for more details

3.10 Right to Know Standard and MSDS/SDS (Material Safety Data Sheets/Safety Data Sheets)

Once yearly, managers and superintendents should provide refresher training and information sessions to the employees assigned to that site. The managers and supervisors should set up a file to ensure that each employee attended the information session and that they actively participated in it.

Material Safety Data Sheets (MSDS)/Safety Data Sheets (SDS)

The MSDS/SDS master file contains a Material Safety Data Sheet for chemicals used throughout the Authority. Copies of the Authority's MSDS book will be kept at each individual site, the Risk Management Center with the master file being kept at Central Stores, 125 Amory Street, Roxbury, MA. A change to the Right to Know law requires by July 2015, all MSDSs will be converted to SDSs adhering to the Global Harmonized System.

Whenever a site orders any product containing hazardous chemicals it is the site manager/superintendent's responsibility to obtain an MSDS/SDS for that product and forward a copy to the Department Head at Central Stores who will provide a copy to the Safety Manager at the Risk Management Center and the Maintenance

Systems Manager. The Maintenance Systems Manager will maintain electronic folders in both the S:Drive and P:Drive.

Yearly Audit of MSDS/SDS

The Director of Central Stores will maintain the MSDS/SDS book as new products are added to our inventory and audit the book yearly to make sure it is up to date and compliant.

3.11 Blood Borne Pathogens and Infectious Diseases

Universal Precaution Standard

The BHA has provided training and equipment to employees regarding how to minimize the risk to them from infectious disease. Training and information sessions have been provided by the City of Boston Department of Public Health Department and by Aftermath Company to employees regarding the use of personal protection equipment when working in any areas with standing or running water. Employees should utilize the proper personal protection safety equipment including protective suits, nitrile gloves, face shields and respirators when needed.

Employees should not be cleaning up blood or human tissue products but should contact an approved vendor such as Aftermath to come to the site immediately to perform cleanup of the site. This is not an endorsement for any particular company. There are other companies that you can seek bids from for this kind of work listed in our procurement system. Risk Management or the Purchasing Department can assist in procuring services for bio-clean up, too.

3.12 Basement and Crawl Spaces – Policy on Safety Protocols

The following details the specific safety protocols required to maintain basements and crawl spaces in order to insure the highest possible level of safety for workers who must perform repairs in these spaces. There are three major areas of concerns:

- Level of lighting
- Flea and other pest infestation
- Ventilation

3.12.1 On-going Maintenance

Each of these items must be addressed on both an on-going basis and each time a repair is required in order to insure adequate safety for workers and residents. This section also deals with the specific protective actions to be taken each time work is required in a basement or crawl space. Basements and crawl spaces must be inspected at least quarterly.

Lighting

All basements must be adequately lit at all times. Preferably, all lights work from a switch near the entryway. If this is not possible, at least one light should be set up from a switch and the remaining lights may be operated with a pull cord, as long as the light from the first light is adequate to see to the next.

Where basement lighting does not exist adequately, temporary lighting strings shall be installed until such time as permanent lighting can be installed.

For crawl spaces, sets of temporary light strings should be available for use when required. These temporary strings should be made in such a way that a person could plug them in at the entrance of the

crawl space and pull the string with him/her as he/she maneuvers through the space. Electricians can make these lighting strings to meet the needs of the specific development and they should be capable of being hung within the crawl space during periods of work.

Flea and Pest Infestation

All basements must be inspected quarterly. If infestation is discovered, the Pest Control Contractor shall be directed to treat the basement on their next scheduled service date for common areas.

If the development has a feral cat problem, the development staff must work out a program for eliminating cats. This involves securing all windows with screens, cement block, or metal plates to insure that cats can not get into the basements. If cement block or metal plates are used, ventilation holes must be included and these ventilation holes must be covered securely with no more than ½ inch hardware cloth or screens to prevent rodent entry. As basements are sealed up in this fashion, a plan must be included to trap all feral cats and turn them over to an animal shelter.

All crawl spaces shall be treated for fleas and other insects on the same schedule as the basements.

To prevent the creation of habitats for insects and mold growth, all basements must be maintained in as dry as possible condition. Therefore, all leaks from waste lines, rain water drains, hot and cold water pipes and steam supply and return lines must be corrected immediately. In order to insure that this is completed in a timely way, all basements must be inspected quarterly.

Ventilation

Most basements are adequately ventilated. However, in the event that they are not, during periods when work must be completed in them, fans should be used to increase ventilation, using open basement doors or operable windows as locations from which to exhaust air. In setting up portable fans, insure that adequate cross ventilation is created.

For crawl spaces, mechanical ventilation must always be used. This is probably best accomplished by setting exhaust fans up near the entrance to the crawl space. If there is more than one entrance, exhaust or intake fans can be set up at more than one entrance.

3.12.2 Actions to take when work is required

Back up Personnel

Whenever a worker is required to enter a crawl space to perform work, a second worker must be located at the nearest exit to the worker. This second worker (usually a laborer or janitor/groundskeeper) should assist with the work as required. If no assistance is required in the actual work, the worker must remain in place for the duration of the work in order that the worker in the crawl space has someone to talk to immediately in the event that a problem occurs. If radios or cell phones are available and practical (in some basements there is no service), each worker should be provided with one for purposes of communication in the event that the location of the work is more than 20 feet away from the entrance of the crawl space.

Protective clothing and use of insect repellants

In all cases where a worker is entering a space, whether a crawl space or basement, where there is a potential for harm, specifically the potential to be bitten by fleas, that worker must be provided with appropriate disposable protective clothing. This clothing is to be worn in such a way that the skin is as fully protected from insects as possible. The worker should also be sprayed down with insect repellent. This clothing should be in addition to any protective gear, such as eye protection, which may be required due to the nature of the work.

Lighting and Ventilation

Prior to the onset of the work, or simultaneously with the onset of the work in the case of an emergency, proper ventilation and lighting should be set up as described in earlier parts of this chapter.

3.13 Window Guards

The Boston Housing Authority is an active partner in the City of Boston's "Kid's Can't Fly" Program. This program encourages parents of small children to install protective guards on windows to prevent small children from accidentally falling out of windows and being injured. The Boston Housing Authority supports this program fully and actively.

It is the Boston Housing Authority's policy therefore:

To maintain a stock of appropriate window guards at both the Central Stores facility and at each development location (including Family and Elderly/Disabled developments and including privately managed sites) for use as needed or provide for same. Such stock shall be maintained in appropriate sizes for each site. To provide and install these window guards free of charge in any unit for which a window is more than six (6) feet above ground level when requested by a parent or guardian of a child six (6) years old or younger. Requests from residents who do not have small children, but who have small children visit on a regular basis, shall be similarly responded to. To install, as a matter of routine, window guards in all common hallway windows which can be opened and are 6 feet or more off ground level. Such window guards shall be inspected as part of the regular hallway inspection program and repaired as needed.

- To participate in the City's educational program annually by distributing educational materials to all residents concerning the "Kids Can't Fly" Program and the option to have window guards installed. Posters and other educational material shall also be posted in management offices and in other appropriate locations at all times. To include information concerning "Kids Can't Fly" and the option to have window guards installed in all new resident orientation meetings.
- To request installation of window guards, residents shall use the work order system. Residents should contact their management office via the work order number distributed to all residents or by other means if necessary, and request a work order to have window guards installed. Residents will be informed of this process as part of all educational materials.
- In the event that window guards have been requested by a resident they will be installed as quickly as possible unless the resident presents information to the office that there is an immediate safety concern with a child (hyperactivity or other reason) in which case the work shall be treated as an emergency work order and completed within 24 hours.
- In the event that a resident requests window guards, they shall be installed in all windows more than six (6) feet above ground level. If the resident requests that one or more windows not have window guards, the resident must sign a statement indicating that they have approved only a partial installation. This need not apply to units with first floor windows, which are not more than six feet off the ground.
- When installing window guards, be certain that the distance between the top of the window guard and the bottom of the lower sash when fully raised is not more than four (4) inches. If the lower sash can be raised more than 4 inches above the top of the window guard, install stops so that the lower sash cannot be opened more than 4 inches above the top of the window guard. (Follow manufacturer's installation instructions when installing window guards).

3.14 Appendices to Chapter 3

Appendices to this Chapter can be obtained on the Fam/Eld S:Drive in the folder labeled **SOP Appendices**, in the sub-folder labeled **Chapter 03 – Safety**. Appendices include Safety related policies and memos etc.

Note: appendices are subject to addition and change at any time.

Chapter 4 Categories of Maintenance Work

Maintenance can be categorized in a number of ways. Each of these categories may overlap. For purposes of the Boston Housing Authority's maintenance program, we have categorized maintenance as follows:

4.1 Regular Custodial, Landscape and Pest Management Maintenance

This is the maintenance performed on a regular basis to insure that:

- Grounds and common areas are clean and safe,
- Site landscaping is properly cared for and the site looks its best
- Snow is properly removed
- Trash is properly stored and disposed of
- Insects and rodents are minimized as a nuisance and health hazard for residents and workers

Custodial maintenance involves the cleaning of building common areas, trash removal, maintenance of bathroom stock, cleaning of apartments, and other work. In many organizations, this kind of work is called "housekeeping" and is separated from landscape care. At the BHA Laborers; Janitor/Groundskeepers and Resident Custodians perform both custodial maintenance and landscape care. [Custodial maintenance is structured differently in the Family and Elderly/Disabled Programs and this is discussed in more detail in Chapter 10 of this manual].

Custodial maintenance is very important, not just to the look and feel of a building, and for reasons of sanitation, but because well cared for surfaces tend to last longer and need replacement less frequently, especially floor tile and carpeting

Landscape care involves the care of grounds, including lawns, shrubs, trees, flower beds, and other grounds elements. It includes snow removal in winter and leaf pick-up every fall. It is the goal of the Boston Housing Authority to have well maintained grounds at all times, including litter pick up, at the same time that a program of regular site improvements is made on an annual basis.

Pest Management involves a variety of activities, including extermination, but also including maintaining cleanliness, removing sources of food and water, and regular resident education. This work is performed by laborers, contractors and management staff. It is the goal of the BHA to reduce pest infestation to a point that pests are not a sanitation or health issue for any resident or worker. All requests for extermination by a resident or through an inspection must be completed within fourteen days Standards for turnaround time is discussed in more detail in Part 3 of this manual.

Generally, all of this type of maintenance – custodial, grounds and landscape care, snow removal, trash removal and pest management - is performed by laborers, janitor/groundskeepers and resident custodians. This work may also be performed by Contractors. In the event that repairs are needed, tradespersons will also assist in this maintenance work. Part 2 of this Manual covers all regular custodial maintenance activities in great detail. Part 4 of this Manual covers information on custodial maintenance activities related to preventative maintenance.

4.2 Repairs and Work Orders

This type of maintenance is the emergency or routine repair of items, which break and are requested by residents or otherwise called to the attention of management. It includes regular vacancy turnover as residents move out and new residents move in.

This kind of maintenance is best managed best through a program of regular apartment inspections and preventive maintenance. It is the BHA's goal to reduce the incidence of resident complaints through its LUI program; its Building & Grounds Inspection program and its Preventive Maintenance program. By doing this, we increase resident comfort and make maintenance delivery as efficient as possible. Work done as part of responsive maintenance may be emergency or routine.

It is the goal of the Boston Housing Authority to reduce responsive maintenance to 25% of its repair workload.

Most repairs are completed by tradespersons and all are recorded on work orders. Work orders are issued through a computerized system and given to a worker to complete. Completion information, such as time and date completed, who did the work, and the number of hours required to complete the repair are also entered into the computer. This is discussed thoroughly in Part Three of this manual.

4.3 Preventive Maintenance

Preventive maintenance is the inspection, cleaning, testing, servicing, repair and replacement of building systems and components on a regularly scheduled, cyclical basis. A well executed preventive maintenance program reduces the need for responsive repairs, decreases the number of times that a system breaks down thus causing interruptions of services to residents, and prolongs the useful life of various systems and components, reducing the need for capital replacement. Preventive maintenance and the BHA protocols and policies are thoroughly described in Part Four of this manual.

Scheduled maintenance can include elements of preventive maintenance, but may also include such work as making repairs found in Living Unit Inspections, or regularly scheduled service such as extermination. Work scheduled as a result of inspections can be performed more efficiently than work in response to requests or emergency conditions.

It is the goal of the BHA that 75% of its work be completed based on its Preventive Maintenance, Living Unit Inspection and Building and Grounds Inspection programs. Only 25% should be the result of unscheduled requests for service.

4.4 Appendices to Chapter 4

Appendices to this Chapter can be obtained on the Fam/Eld S:Drive in the folder labeled **SOP Appendices**, in the sub-folder labeled **Chapter 04 – Categories**. **Note:** appendices are subject to addition and change at any time.

Chapter 5 Stock and Inventory Systems

Standards: *Managers and maintenance superintendents are responsible for developing a customized stock list for each development, keeping all needed repair parts on hand, and maintaining stock and equipment in a secure and orderly manner.*

On a regular basis, the list should be reviewed and if needed, changes should be made. Any new stock needed as the result of capital replacements or other circumstances should be added to the list ordered immediately.

5.1 Developing a Stock List for Developments

Customizing the stock list will require meetings with the Electrician, Plumber, Laborers, J/G's, Resident Custodians, the Maintenance Supervisors and others. Some information may be extracted from a development's Preventive Maintenance Manual. Also, previous purchase orders and work orders can serve as an excellent source for the stock items used in common repairs. A report of stock requisitioned through Central Stores can be run on CCS by development for a particular date range which will give you quantities ordered and types of stock specific to your development.

The stock inventory list should include all items to be maintained in the stock inventory at the development at all times. Makes, models, sizes and types of parts will need to be recorded as they apply to each development. The stock list will also indicate the maximum and minimum numbers of each stock item that should be maintained at all times. The stock list should also include standard custodial and landscaping supplies and tools to be kept on hand. It is not necessary to track singularly, stock that is ordered in bulk such as nails, screws, washers, etc.

5.2 Storage Areas and Security

Managers/Superintendents are responsible for ensuring that their laborers and mechanics have adequate and secure storage and shelving space for stock. Access to these areas should be limited to those who absolutely need it. Managers/Superintendents must maintain at least baseline records of stock usage. Section 5.5 describes draw-down inventory system, which is the preferred method of maintaining records. However, Managers/Superintendents may instead use a Sign-out Sheet system. Under this system, a stock sign-out sheet is maintained on a clipboard in the stock room. Each time stock is used by a Mechanic, the removal of stock is recorded, the apartment and work order number is listed, and the item is signed for. All stock areas should be kept clean and orderly. Items should be stored in bins and shelves; not in boxes piled in stock areas.

5.3 Anticipating Needs/Reorder Points

Keeping an adequate amount of stock on site will improve the efficiency and quality of completing repairs. Manager/Superintendents should ensure that all stock items have a recommended reorder point and not allow stocked items to be used up completely before reordering. Generally, it is the responsibility of each regularly assigned mechanic to insure that at least the minimum quantity of each item is on hand at the development. If you rely heavily on roving mechanics, however, the manager/superintendents should do a periodic check of supplies on hand to insure an adequate amount. If this isn't done, it is likely that stock will deplete to nothing before a mechanic notifies the superintendent that a reorder is necessary. At a minimum, quarterly physical inventories should be done to get accurate quantities on hand. Some smaller developments with little storage room would have smaller reorder points and should take physical inventories more often such as monthly to assure that there are minimum quantities maintained at the site. Stock used should be indicated on all work orders. Stock that is ordered through Central Stores has a stock number associated with it and that number and a description of the stock need to be recorded on the work order. For

vendor items, the word "Vendor" should be recorded in place of the stock number and a brief description of the item and price if known are, also, recorded on all work orders.

5.4 Purchasing Materials and Supplies

Property Managers and Superintendents may purchase materials and supplies through the BHA's Central Stores or from outside vendors. See the On-site purchasing manual for information on procurement rules, ordering from central stores, and ordering from outside vendors.

5.5 Draw Down Inventory Systems

A draw down inventory system is a system under which every time stock is taken out, it is noted, and a new balance on hand number is created. If all stock is recorded on all work orders, it is an easy task to drawdown stock from your list as work orders are reviewed daily. Using a system like this, Property Managers and Superintendents know immediately, at any point in time, exactly how much stock should be left. Periodic counts are used to audit this kind of system and check for pilferage or other problems. Managers and superintendents must implement such a system as soon as possible. See FamEld S: Drive, SOP Appendices for a sample draw-down inventory systems form.

5.6 Appliance Replacement Procedures

Stoves, refrigerators and hot water heaters are replaced only when they no longer work at all and cannot be repaired. Each type of appliance should be checked by the appropriate trade's person prior to deciding that it no longer works. Refrigerators and gas stoves should be checked by an appliance man. If the problem with a gas stove relates to gas fittings, plumbers check this. Hot water heaters are usually checked by plumbers, but electrical components (for electric hot water heaters) may need to be checked by electricians. Electric stoves are checked by an electrician, unless it is repairing doors, handles and knobs (appliance man) or the simple replacement of a plug-in type burner (MOU agreement). Before disposing of stoves and refrigerators that are beyond repair, have your appliance man or laborer remove and salvage any parts for reuse (i.e.: vegetable bins, shelves, etc.).

As part of the stock inventory, list the standard stove and refrigerator sizes and types for each development. This would include handicapped ranges and ovens as well as hot water heaters where applicable.

Standards: *The Property Manager is responsible for maintaining at least two spare appliances of each type at a minimum at each site at all times. When one is used, another is ordered.*

Most appliances are stocked at Central Stores but larger developments which require more than two spare appliances of each type can make arrangements for direct shipment. Central Stores personnel will arrive at the development after a direct shipment has been made and record the serial number on the appliance tracking form and leave copies with the Maintenance Superintendent. The process for tracking and controlling appliances must start with the BHA appliance requisition and disposal form. The appliance staff member should use and complete this form. This provides a useful tool to monitor the number of appliance used per site. It also allows management and maintenance the ability to monitor whether or not residents are maintaining the appliances properly.

Once the determination has been made to replace an appliance (Stove or Refrigerator) the appliance requisition and disposal form must be completed and forwarded to Central Stores. A work order must be created to remove the old appliance and to deliver and install a new one. The serial numbers of both the old appliance (if legible) and the new appliance should be recorded on that work order and the appliance log. A sample appliance log is in the SOP appendices, Chapter 5. Recorded on the appliance log should be the type of appliance, the date received into inventory, the serial numbers of the old and the new appliances, work order number to deliver and install, apartment number and date the appliance was installed. Also, all

used appliances need to be tracked on the appliance log when removed from one apartment and reused elsewhere.

Central Stores will issue the new appliance along with an appliance tracking form, two part form with a blue and pink copy. This form will provide the type of appliance and whether it is electric or gas operated, and the size that was requested. It will also provide the make, serial number, date of installation, installer, date of inventory, and the name of the individual that performed the inventory. The form also includes space for the development name, unit address, and unit number. Review these forms for accuracy as soon as the appliance is received into inventory and before the blue copy is returned to Central Stores.

When the development receives and installs the appliance, the tracking form must be completed and returned to Central Stores, blue copy. The pink copy of the tracking form remains at the development as the record copy. This pink copy should be filed in the work order file for the apartment that received the appliance or filed in an appliance binder by date. If this action is performed correctly each site will have the necessary information to track all appliances that have been received or disposed of.

5.7 Appendices to this Chapter

Appendices to this Chapter can be obtained on the FamEld S: Drive in the folder labeled **SOP Appendices**, in the sub-folder labeled **Chapter 05 – Stock and Inventory**. Appendices include Central Stores Catalog, Appliance Log – Sample, Draw Down Inventory List – Sample Template, etc. **Note:** appendices are subject to addition and change at any time.

Chapter 6 Maintenance at Night and On Weekends

The Boston Housing Authority is responsible for responding at all times to emergency maintenance conditions. The BHA therefore operates both a night service and weekend/holiday emergency coverage through its Emergency Response Services (ERS) unit of the Operations Department.

6.1 Night Service

The Night Service operates from 4:00 p.m. to midnight on all regular workdays (Monday through Friday) and on most holidays from 12 noon to 12 midnight. This service consists of an ERS Director, a plumber, an electrician, two laborers and a burner mechanic. Work Order Center operators are also on duty during this period to take calls, create work orders and manage paperwork. A log of all calls is created each night and sent to appropriate field staff via e-mail. Additional staff is called in by the ERS Director when needed to make repairs such as lock changes or to provide clean up services after a flood or fire. The ERS Director may call the manager or maintenance superintendent of a site if needed for additional supervisory coverage in a major emergency and to assist residents at a site.

It is very important that the ERS Director notify the site if there is any follow-up work to be completed due to a night or weekend call, especially if the problem was only abated and not fully resolved, or if there were resident damages involved. This can be done via e-mail or phone call but should be done in addition to the log information.

6.2 Emergency Response Services

Duty Officers are responsible for managing the repair of emergency conditions from mid-night to 8:00 a.m. weekdays and from 12:00 a.m. Saturday until 8:00 a.m. on Monday weekends (basically, between the time the night service ends and the work day begins). Duty Officers are senior staff members, including Regional Managers, Assistant Directors, and members of the Building Services staff, who are assigned to duty a week at a time from three to four times each year.

From midnight to 8:00 a.m. each night, there are no Work Order Center operators on duty. Emergency calls are handled by Police Dispatchers. The Dispatchers obtain certain basic information, including the resident's name, address, phone number and a description of the problem. They then call the Duty Officer of the Week with that information.

Duty Officers must call the resident back to discuss the problem and make a decision as to whether or not to call in staff. A log sheet is used by Duty Officers to record information and actions taken for each call.

In the event that the Duty Officer determines it is necessary to call a staff person in, the Duty Officer will be responsible for making those calls.

A notebook containing the names and phone numbers of all staff in Operations by site is made available to each Duty Officer during their assigned week. This notebook should be picked up at the Work Order Center/ERS office on Friday and dropped back off promptly the next Friday.

The Duty Officer is responsible for determining whether it is an emergency that must be dealt with immediately, or if it can wait until site staff come in the next morning. A call on a night which is before a weekend day or holiday may be handled differently than a call prior to a regular work day. The definition of emergencies is as follows – these represent all items which must be completed within 24 hours:

- Flooding from any source
- Fire
- Back up - actual back up of sewer and/or storm drain water into an apartment or basement
- No Electricity (half electricity is only dealt with as an emergency during normal working hours, Friday nights or during the day on Saturday, Sundays or Holidays)
- Non-working smoke detector (can be abated by installing a battery operated smoke detector until an electrician can get to the site)
- Door won't lock or resident is locked into the apartment
- Toilet stoppage (in the case of only one toilet in the apartment)
- Total failure of refrigerator
- No hallway lights
- Total failure of all four stove burners (oven excluded; oven is not an emergency)
- No Hot Water
- No Heat in the entire apartment (Sept 15 - June 15 only)
- Gas leak / no gas
- No water
- Active steam leak in the apartment or public common area only, or in an area where it threatens a piece of equipment.
- Lack of apartment security (i.e. broken window which can be entered)
- Any other condition which presents an immediate threat to health or safety (may be caused by natural disaster)
- Any condition deemed to be a safety hazard
- Release of any oil or other hazardous material at the site; report to Building Services immediately.

Not all of the above situations will result in the immediate call in of staff depending upon whether or not the situation affects the immediate health or safety of the resident and whether or not the situation is likely to result in substantial damage to the building or resident's belongings if not dealt with as quickly as possible.

- For instance, a plugged toilet, called in at 2:00 a.m. can wait until the next morning. An overflowing toilet must be dealt with immediately.
- Half electricity calls can always wait; no electricity calls for individual apartments can usually wait, but resident circumstances may require a quicker response.
- No heat calls should be dealt with immediately if they affect an entire building or more, or if temperatures are very low. Close questioning of an individual resident's complaint will determine whether or not an individual call needs to be dealt with (for instance, they should be asked to check radiator valves and thermostats, they should be asked if the radiator has heat, etc. Or, if it is not terribly cold out, and the call is at 4:00 a.m., the resident should be able to wait).
- No hot water calls generally wait until morning. If they affect a large part of a development, the development plumber may be called in early if the next day is a regular work day.

Calling in staff:

The Duty Officer may decide to call in staff depending upon the nature of the problem:

- The manager or superintendent in the case of a major emergency, such as a fire or major flood. The manager/super can assess the situation and decide who else to call in.
- The Resident Custodian at elderly/disabled sites or the Special Assignment Laborer at family sites.
- A tradesperson. For carpenters, plumbers and steamfitters, the development staff person is called first. Electricians are called in the order provided by the union.
- If keys are required by the tradesperson, the tradesperson needs to go to Amory Street and see the BHA Police Officer on duty in the station located at the rear of Amory Street who has a key to open the ERS office, where development keys are kept. Tradespersons must show the Officer their BHA ID. A sign

out sheet is located next to the key box and the tradesperson must return the key(s) and sign them back in at the ERS office when finished.

Duty Officers make these calls themselves and follow up to insure the work is completed. If another call comes in for the same trade, the tradesperson already on is expected to perform that work.

The next morning, the Duty Officer must call in to obtain a work order number and make sure that the work order information is completed. In addition, the duty officer is responsible for signing any overtime slips associated with work the duty officer has authorized.

It is very important that the Duty Officer notify the site if there is any follow-up work to be completed due to a night or weekend call, especially if the problem was only abated and not fully resolved, or if there were resident damages involved.

All information must be recorded on the Duty Officer's log sheet. The log sheets, with copies of work orders and overtime slips attached, shall be turned into the Director of the Work Order Center as soon as possible after the Duty Officer's week is completed.

6.3 Weekend Service

On Saturdays and Sundays, tradespersons and laborers are assigned on a rotating basis to cover emergencies. As a general matter, this includes a plumber, an electrician and a laborer on two eight-hour shifts each (8:00 a.m. to 4:00 p.m.; 4:00 p.m. to 12:00 midnight). There is also a Work Order Center operator during these same hours. Depending upon the time of year, a steamfitter or burner mechanic may also be assigned. Duty officers are responsible for supervising the work on these days (but may do so from home) and follow the same general principles in determining whether or not to call in additional staff as they do at night. There are a few differences:

- ERS operators will be on duty and can make calls to staff to come in.
- Once a tradesperson is in, there are likely to be additional calls and the tradesperson needs to know that they must stay in touch with the operator to see if there are more calls.
- Keys will be available at the Work Order Center.
- Work orders will be issued as the resident calls in the work.

Duty Officers should use the same paperwork process as for nights and are responsible for insuring that all paperwork, including work orders and overtime slips are completed and processed.

6.4 Maintaining staff lists / Notification of absences

The Work Order Center and Night Service must have accurate information regarding emergency coverage and absences. Each development and region are responsible for ensuring that their staff lists are up to date and complete. This includes names, title, home phone number, and other numbers such as cell phones and work location. Each development/region is responsible for maintaining their staff lists up to date on the S:drive/Family/ERS Updates. Whenever a change is made, the Work Order Center Supervisor must be notified so that the ERS book can be updated.

The Work Order Center and Duty Officer must also be notified, via e-mail, of all absences for illness or vacation. The Work Order Center Supervisor must also be notified of who is covering for resident custodians and special assignment laborers.

6.5 Manager/Supintendent responsibility for responding to calls during non-working hours

6.5.1 Introduction

The following is the BHA's official policy regarding calling in supervisory staff during off-hours and the obligation of staff to respond to off-hours emergencies. This policy implements that section of the Teamsters Union contract which provides for stipends for these staff who are required to carry cell phones unless specifically off duty (on vacation, etc.). The following is exactly the same as the policy originally issued except that it removes categories of workers no longer working at the BHA.

6.5.2 Policy and procedures

The following policy is a guide to emergency response services staff and the Boston Housing Authority police as to when to contact managers and other staff during non-working hours. It is important that all staff understand that emergency situations call for good judgment at all times. The following guidelines should be used to assist in making a decision as to when to call managers but cannot, by its nature, cover every situation.

It is important that when calling staff during off-hours that all staff respect the need for private time away from work. Calls should never be made if the question or situation at hand can be handled the next day, or through fax or e-mail communication which will be received the next day.

In general, staff will be called in by the BHA's Emergency Response Services staff. In certain circumstances, such as incidence of crime unrelated to building maintenance, staff may be called by the Boston Housing Authority police.

This policy shall be distributed and explained to all site managers and maintenance superintendents, operations supervisory staff, emergency response services, the Boston Housing Authority police and dispatchers, and all other staff to which this policy applies.

Situations requiring that managers are notified

The following situations should cover the majority of emergencies requiring notification of managers. In each of these situations, the decision of a manager as to whether or not to come in shall be made based on the severity of the situation and the impact on the resident(s). Managers should contact their supervisor prior to making this decision except in the case of a major emergency in which the time spent in this contact would be likely to delay their response in a harmful way. In this situation, the manager should request that the Work Order staff contact their supervisor and inform the supervisor of the circumstances.

Managers may also determine that the most appropriate person to respond to a particular emergency is a maintenance superintendent. This is a decision that should be made by the manager based on information provided by emergency response services.

The following list is intended to be as comprehensive as possible a list of when managers are to be called during off -hours:

1. Flooding or back-ups affecting more than one unit or severe or prolonged flooding in a single unit
2. Lack of electricity for more than one unit or lack of electricity in one unit which may last more than 8 hours
3. Lack of any basic utility such as water, hot water, gas or heat which affects more than one unit or affects one unit for more than 8 hours
4. Any instance of fire
5. Any instance of sudden death
6. Lack of stove or refrigerator for any resident for more than 24 hours

7. Lack of toilet facilities for a resident which may last more than 8 hours
8. Any instance in which a concern that a resident may be incapacitated within an apartment and keys are not otherwise available for gaining entry to the unit to check on a resident
9. Any instance of major crime such as a shooting, murder, assault or rape
10. Any instance in which the security of the office, agency space or maintenance shop has been breached
11. Conditions requiring immediate security of a unit from weather or intruders
12. Any other situation in which the health or safety of residents may be significantly affected
13. In response to snow storms requiring on-site supervision of staff
14. In response to major natural disasters such as hurricanes, damaging northeasters, or other situation.

Situations involving staff other than managers

Maintenance Superintendents: The decision to call in a maintenance superintendent will be made by the manager based on information provided by Emergency Response Services. If maintenance superintendents are specifically covering a development in the absence of a manager, they may be contacted directly by emergency services personnel.

Resident Custodians and Special Assignment Laborers: Resident custodians in the elderly/disabled and special assignment laborers in the family shall be called in response to all building emergency situations requiring access to a unit or assistance to other response personnel. Resident custodians and special assignment laborers are hired specifically to respond to emergencies in their buildings, and the guidelines for calling them are much looser than for other employees.

Contacting senior staff

Managers shall contact their supervisor whenever a major emergency situation exists. Generally speaking, it shall be the Emergency Response Services responsibility to contact the manager and the manager's responsibility to contact senior staff. It is important to remember, however, that senior staff must be contacted in major emergencies to assist the manager in resolving the situation and if needed or appropriate, Emergency Response Services should contact senior personnel directly.

6.6 Appendices to this Chapter

Appendices to this Chapter can be obtained on the Fam/Eld S:Drive in the folder labeled **SOP Appendices**, in the sub-folder labeled **Chapter 06 – Night and Weekends**. Appendices include policies; call logs, instructions for Duty Officers etc. **Note:** appendices are subject to addition and change at any time

Chapter 7 Planned and Unplanned Utility Shut Downs & Major Emergency Response

7.1 Introduction

This chapter deals with major development emergencies and how managers, supers and other staff need to respond. This includes emergencies which affect more than one resident, and usually an entire building, section of the development, or entire development, including:

- Fire
- No Heat
- No electricity
- No Water or No Hot Water
- Flooding including Back-ups

These are conditions that are immediately threatening to the life or safety of the residents, staff or site. Whenever an emergency occurs during regular working hours the manager and maintenance staff must stop whatever they are doing and correct the problem.

Emergency conditions are generally unplanned, but can include scheduled shutdowns of utilities. Scheduled shutdowns allow staff to notify residents in advance and put appropriate services into place for the duration of the emergency. On the other hand a fire or flood would be an unplanned condition and would require a different set of responses. Emergencies discussed in this section include basic service shutdowns (both planned and unplanned), floods, backups, elevator shutdowns and acts of God.

7.2 Shutdowns of Basic Services – Planned and Unplanned

Basic services include:

- Electrical
- Heat
- Hot Water
- Water
- Elevators

7.2.1 Planned Shut Downs of Basic Services

Planned shutdowns will be scheduled for the least disruptive times possible. Whenever possible, services will not be shutdown prior to 8:00 a.m. to allow residents to bathe prior to the shutdown. Elevator shutdowns will be made at mid-day or mid-night, giving residents plenty of advance notice. In the event of a planned shutdown of basic services the following procedures should be followed.

Notify the residents as much in advance as possible.

Managers must notify residents of the time the service will be shutdown, the purpose of the shutdown, the anticipated return of service and any other necessary information (such as actions residents perform in preparation of the event.) Managers should also request that residents notify management if they require any special assistance during the shutdown period.

Notify the Work Order Center and the City Hall 24-Hour Emergency Number.

This should be done in advance of the shutdown. Be sure that all appropriate supervisory personnel are also notified.

Notify residents of any delays.

Notify residents immediately if the return of service will be delayed.

Provide residents with appropriate services.

Depending on the type of shutdown, appropriate services are to be provided to residents. These services may include providing meals or special equipment (such as space heaters.) You must keep a log of special equipment that is being provided to the resident, as these items shall be returned when services are returned to normal. A transmittal form can be found for space heaters in the following SOP Appendices folder - S:\SOP\SOP Appendices\Chapter 30 - Heating Sys\Heat and Hot Water Temp. Log/Temporary Space Heater Transmittal.

Provide additional security in the case of electrical shutdowns.

Darkness can create problems in an otherwise secure building. In the case of an electrical shutdown at night (even in buildings with generators) additional security should be provided at the discretion of the manager, Regional Manager and/or Assistant Director of Property Management. This can be arranged through the Public Safety Office. Additional security may be used to walk the buildings in addition to the front desk guards where appropriate in Elderly/Disabled Buildings. In family developments, visibility of police throughout the development is important.

Provide flashlights to residents, if necessary.

Plan to check flushometers following a water shutdown.

In buildings with flushometers, all flushometers will need to be checked and cleaned immediately after the water is turned back on. One or more plumbers should be on site to start this work.

7.2.2 Unplanned Shutdowns of Basic Services

In the case of an unplanned shutdown, all planned shutdown procedures should be followed as quickly as possible. If the shutdown occurs during off-hours, the manager and/or superintendent will be required to go to the site to ensure resident safety and perform any necessary work. The determination of who is called into the site and the number of site staff needed shall be made by the Manager in consultation with the Assistant Director of Property Management and/or the Deputy Administrator for Housing Programs.

- The manager should stay on site and be visible. This not only provides him/her with direct access to information on the progress, but also reassures residents.
- Managers should perform a door to door check of all residents in elderly/disabled buildings to determine whether they have any special needs. Also, in the case of an electrical outage, all electric and electric ignition stove dials should be checked to make sure they are in an off position and a suggestion to check stove dials included in any flyers to residents.
- Managers should keep residents informed about progress using flyers and other methods.

7.3 Flooding

Flooding usually affects only a limited number of residents. The following measures are meant to contain the problem and ensure resident safety:

7.3.1 Stop the flooding

Identify the source of flooding and turn off the source of water immediately if possible. Sources of flooding include:

- Water used by the Fire Department in putting out fires
- Overflowing tubs, toilets, sinks and washing machines

- Broken valves or pipes in kitchens and bathrooms or common areas, including flushometer valves and heating system breaks
- Broken Washing Machine hoses
- Roof or building envelope failure
- Sprinkler system activation or system head failure
- Backups (discussed in next section)

Anyone may turn off a source of water, which is causing flooding, damage to property and risking the health of residents. In the case of broken valves or pipes, this often involves closing a valve, which serves more than one resident.

7.3.2 Make Notifications

Whenever there is serious flooding, immediately contact:

- Work order Center
- Director of Building Services
- Supervisors – Program Maintenance Supervisors, Regional Managers, Assistant Director of Property Management
- City Hall
- Risk Management Department – if there is any damage to BHA property or building systems

7.3.3 Check on and assist residents

Check the condition of every apartment in the area of flooding. Assist any resident who needs to move their personal belongings out of the way of the water. Escort residents out of severely flooded apartments and assist them in finding a place to wait or stay while repairs are made.

7.3.4 Make Repairs/Clean up

Repairs

Development staff or night crew/ERS staff should make repairs as quickly as possible. If necessary, call in a contractor. Plumbers can replace sprinkler heads, which should be on-site. Other repairs might include replacing valves, cutting out and replacing a section of pipe, and securing a roof or building envelope failure. All repairs should be made as permanent repairs during regular working hours and during off-hours, unless the repair would take too long. In these cases, a permanent repair must be made as quickly as possible during the regular work week.

Contact the Alarm Service Contractor in the case of sprinkler flooding to reset the alarm after the repair is made.

Perform Appropriate Clean-up.

Begin clean-up activities as soon as possible after the water has stopped. The most hazardous areas should be addressed first. Call for additional assistance (by contacting supervisory staff) if needed. In cases of severe flooding, a contractor may be needed to assist with clean-up, especially if a fire or back up of sewage was involved.

Check Flushometers

Where there has been a water shutdown, and the building uses toilets with flushometers, all flushometers must be checked by plumbers. Often, dirt moves into the valve mechanism causing toilets to run constantly and interfering with bringing back full water pressure to the residents.

Assess damages to tenant belongings

The BHA does not insure tenant belongings and will only reimburse residents if the damage was caused due to our negligence. However, residents may make claims for reimbursement to the Risk Management

Department; therefore, managers should keep track of resident claims of damages as best possible, including taking photos if appropriate.

Move residents, if necessary

It may be necessary to move a resident to another apartment. If the damages can be repaired quickly, the move should be temporary. If a permanent administrative transfer is required, the paperwork should be completed and submitted to the Assistant Director of Property Management immediately. The Deputy Administrator for Housing Programs should be notified by phone immediately of any emergency moves, permanent or temporary. All administrative transfers performed under this provision must include the resident signing a Use and Occupancy Agreement for their new apartment; do not sign a new lease.

7.4 Back Ups

A back up should be treated in the same way that floods are, except that backups oftentimes contain sewage and require additional disinfecting. Also, shutting down the water does not always stop a backup. It may be caused by a common waste line stoppage or by storm water from a heavy rainfall, which may or may not mix with sewer line waste.

Turn off the source of water as soon as possible.

While this will help to lessen further damage, it will not necessarily stop the backup.

Arrange for repairs and/or drain clearing.

Make repairs as soon as possible. An outside Drain Clearing Contractor may be needed. If this is the case, a purchase order should be issued before or on the next business day after the service is rendered. In an emergency, it is not necessary to obtain three quotes; especially if the water/sewerage is accumulating quickly, use the first contractor who responds to your call.

Clean up and Follow up:

- Using the same protocols as in the previous section on Flooding:
- Make all necessary notifications.
- Check on residents.
- Stay on site to supervise crews and make sure the problem has been resolved
- Ensure that adequate cleanup is done.
- Assess damages to resident belongings.
- Move residents, if necessary.

7.5 Elevator Shutdowns

Elevator shutdowns are not an emergency unless all elevator service is disrupted. All elevator contracts require the service contractor to respond to these situations within two hours and to continue working until service is restored. Steps to take are as follows:

- Contact the Elevator Service Contractor .
- Notify and check on all residents.
- The Manger/Superintendent must stay on site until service is restored.
- Use signs and flyers to notify residents of the elevator shutdown. Check on residents to determine whether they will need assistance leaving the building in an emergency.
- Arrange for additional security.
- Additional security should be brought in to walk the hallways during the shutdown.

7.6 Other Emergencies

In general, emergencies not covered in this section will fall under the emergency response planning procedures. These emergencies could include situations (i.e., fires, hurricanes, chemical leaks, etc.) which would require the evacuation of the building. In the case of this type of emergency, you should follow your development's emergency response plan and follow the instructions of emergency response personnel. All damage to BHA property or building systems should be reported to the Risk Management Department.

7.7 Appendices to this Chapter

Appendices to this Chapter can be obtained on the Fam/Eld S:Drive in the folder labeled **SOP Appendices**, in the sub-folder labeled **Chapter 07 – Maj. Emerg. Resp.** **Note:** appendices are subject to addition and change at any time.

Chapter 8 Hazardous Materials/Waste

8.1 Right To Know Law

The Massachusetts Right to Know (RTK) Law became effective in 1984 and it applies to state, county and municipal workplaces in Massachusetts which includes the Boston Housing Authority. The workplace portion of the Mass Right to Know law requires that information on chemical hazards be given to employees by providing them with access to Safety Data Sheets, formerly Material Safety Data Sheets (SDS, MSDS), by labeling containers of chemicals and by training on chemical hazards and safe work procedures on an annual basis.

8.2 Identification of Possible Hazardous Materials/Waste

It is the intention of the Boston Housing Authority to protect the staff and residents from exposure to any materials brought to the site, including products with SDSs or those whose origins are unclear. Once a discovery has been made, exposure of staff and the public must be minimal. Not all chemicals or materials discovered would be hazardous, but staff must report any suspected hazardous materials to supervisors immediately so that proper precautions can be taken.

Management staff should immediately notify the Program Maintenance Supervisor, Assistant Director of Property Management or the Director of Building Services to receive guidance.

MSDS/SDS sheets for most products carried at Central Stores can be found in the Operations S:drive: **S:\SOP\SOP Appendices\Chapter 03 - Safety\MSDS**. Any product purchased from somewhere other than the Central Stores Department should have a MSDS/SDS provided when purchased or can be found online.

Some of the steps would include:

- Providing a description of materials and location to the Maintenance Supervisor and Manager.
- Notifying the Fire Department if the source is unknown, depending on the type of material.
- Isolating the area with proper barriers.
- Protecting the area by taking into account weather impact, i.e. wind blowing material, rain water runoff etc.
- Identifying possible public exposure i.e. open windows and doors, paths of travel etc.
- Specific material information can be found in the MSDS/SDS Book provided by Risk Management, if the material is known.

8.3 Asbestos

Asbestos may be found in flooring, pipe covering, soldered joints, boiler areas, insulation, fireproofing, textured ceilings, gypsum wall/ceiling board, and joint compound. Staff needs to protect themselves and the residents first. They must then identify the amount of exposed materials and its location. Undisturbed or contained areas provide minimum risk. Damaged or loose material needs to be secured by a certified contractor. The Manager may wish to contact their Capital Program Project Manager for assistance. Abatement will need to be scheduled and all necessary documentation should be filed by the contractor with the state. Current lists of Licensed Asbestos Abatement Companies and Certified Asbestos Analytical Labs can be found in the SOP Appendices: **S:\SOP\SOP Appendices\Chapter 08 - Haz Mat\Vendors**.

An asbestos control program, designed to minimize exposure of B.H.A. residents and staff to asbestos fibers, has been established for most of the elderly portfolio at the B.H.A. The Operations and Maintenance (O&M) Plan is part of the program and sets guidelines for the proper in-place management of all presumed

and identified asbestos-containing materials located in and on the buildings. The O&M plan can be found in **S:\SOP\SOP Appendices\Chapter 08 - Haz Mat\Operations and Maintenance Plan, Asbestos Containing Building Materials**. A list of trained staff is maintained with the Risk Management Department and Central Services Department. The O&M Plan describes notification procedures, O&M activities, record keeping and training requirements.

8.4 Lead Paint

The Authority has worked systematically over time to eliminate areas of lead paint. All new construction can be considered lead free. You can not make that assumption with rehab work. If there are questions about painted areas containing lead, the lead files (Red files), where all lead inspection results, sampling documents and letters of compliance can be found, should be reviewed. The Red files shall be filed by apartment number in the management or maintenance offices and may be electronic as well. The staff can, also, contact their Capital Program Project Manager to obtain assistance. The staff should identify the location of the suspected area and report to Management.

Before renting an apartment to a new tenant, the development manager and the new tenant must sign two copies of the Tenant Lead Law Notification and Tenant Certification Form. The manager must give the tenant one of the signed copies to keep and the other is filed in the tenant file (**not** the work order file or the red files). If any of the following forms exist for the apartment, tenant must, also, be given a copy of them: lead inspection or risk assessment report, Letter of Compliance, or Letter of Interim Control. The notification form is for compliance with both Massachusetts and federal lead notification requirements. At every subsequent tenant status review, any additional information attained between the lease up and the TSR or from one year to the next at time of the TSR, the tenant must be given copies of those additional reports. The form for this procedure can be found in the SOP Appendices: **S:\SOP\SOP Appendices\Chapter 08 - Haz Mat\Notification and Disclosure Rule, Lead Paint**.

The Massachusetts Lead Law requires the removal or covering of lead paint hazards in homes built before 1978 where any children under six live. Lead paint hazards include loose lead paint and lead paint on windows and other surfaces accessible to children. If a tenant makes claims that their child has an elevated blood level and we have information that their apartment has lead, we are required to abate that hazard. If there is no knowledge of lead in the apartment, testing must be done to determine if lead abatement is necessary.

On April 1, 2010, another law was created to decrease lead exposures called the Renovate, Repair and Painting Rule (RRP). It requires, in homes built before January 1, 1978, additional steps to be taken if painted surfaces with known lead or if there is no knowledge whether there is lead or not are disturbed. In the state regulations, procedures and care must be taken if disturbed surfaces equal 6 square feet or more and the HUD regulations require procedures and care be taken if the painted surface disturbed is equal to 2 square feet or more. All notification forms, explanations of the law, differences between the MA RRP and the HUD RRP, certifications, etc. can be found in the SOP Appendices: **S:\SOP\SOP Appendices\Chapter 08 - Haz Mat\Renovate, Repair and Painting Rule, forms and information**.

8.5 Medical Waste

Medical Waste can be found in all areas. Staff shall report the location of items immediately. Staff must take precautions entering basements, hallways, elevator pits, stairwells and units. Proper personal protection and special containers are designated for the disposal of these items. The City of Boston's Emergency Medical Services should be contacted to pick up all medical waste items. All instances will be reported to Management.

As of July 1, 2012, medical waste regulations do not allow the disposal of sharps in household garbage. Maintenance Offices have sharps containers that are to be used to dispose of any hypodermic needles found on the site. You can find a drop off location in the SOP Appendices: **S:\SOP\SOP Appendices\Chapter 08 - Haz Mat\Proper Use and Disposal of Needles and Syringes**. The BHA Public Safety Department can be notified to transport sharps containers for disposal, too.

If medical waste clean up is required where bodily fluids are involved or large amounts of sharps, a professional company should be procured. Call the Risk Manager for assistance with these types of clean ups. The Purchasing Department, also, will have a list of qualified vendors for medical waste clean up.

8.6 Pesticides and Mold

The BHA implemented an Integrated Pest Management (IPM) program that does not require automatic pesticide application unless there is definite evidence of an infestation. Inspections, monitoring infestations, exclusion, tenant education, behavior modification for residents and staff, limited usage of pesticides and upkeep of the facility are the main components in the IPM program. Pesticides, pests and mold are known health hazards and are noted here for those reasons. For more information regarding pests and mold and how to deal with them, read further in this manual, Chapter 16, Pests and Mold or go to the **S:drive, SOP Appendices, Chapter 16, Pests and Mold**.

8.7 Smoke Free BHA

The BHA has a non-smoking policy as of September 2012. This policy is to mitigate the irritation and known health effects of second-hand smoke in Boston Housing Authority (BHA) buildings. In addition, it is intended to decrease maintenance costs, decrease risk of fire in BHA units and decrease fire insurance. The policy, lease addendum and other pertinent information can be found in the P:drive: **P:\Non Smoking Policy and Smokers Survey**.

8.8 Appendices to this Chapter

Appendices to this Chapter can be obtained on the Operations S: Drive in the folder labeled **SOP Appendices**, in the sub-folder labeled **Chapter 08 – Haz. Mat. Note:** appendices are subject to addition and change at any time.

Chapter 9 Resident Installed Equipment/Structures

9.1 Lease Provisions

The Boston Housing Authority Lease does not permit residents to make permanent alterations to their units or private yard spaces without management permission. The following are the applicable lease provisions:

Section 8. Resident Obligations:

"During the term of this lease, resident agrees to:....

- K. Install no lock and make no alteration or addition to the interior or exterior of the Apartment or any building without the prior written approval of BHA, which approval may not be unreasonably withheld. Any alteration or addition which is affixed to the Apartment and which cannot be removed without permanent damage to the Apartment will become the property of BHA without compensation to the Resident. However, with the written approval of BHA, which approval may not be unreasonably withheld, resident shall have the right to remove alterations or additions to the extent that no permanent damage results and provided that Resident fully restores the Apartment to its original condition.
- L. Refrain from installing any major appliance such as air conditioners, washers, dryers, freezers or any heavy item, such as a waterbed, without the prior written approval of BHA, which may not be unreasonably withheld.
- M. Refrain from installing, placing, storing, constructing, erecting, maintaining or using any swimming pool, wading pool, children's pool or any other type of pool anywhere on BHA property which is larger than eighteen (18) inches high and seventy (70) inches in diameter. Resident shall empty all such pools whenever not in use."

9.2 Common Issues

Residents may make alterations without permission. When managers, maintenance superintendents or tradesmen visit apartments for inspections or work to be completed, they may see some of the most common issues listed here:

9.2.1 Satellite Dishes and TV Antennae:

Satellite Dishes and TV Antennae may never be placed on or attached to roofing systems or any surface of the building envelope that requires attachment to the building structure except as outlined below and should be removed anytime they are found there. The responsible resident should be contacted and appropriate lease enforcement actions taken when these items are found.

Federal Communications Commission [FCC] regulations, prohibit the BHA from prohibiting installation of satellite dishes, but allow us to impose reasonable conditions upon their installation, which follow:

- Residents must seek written permission from the manager to install a satellite dish. If they do not, they are in violation of their lease. All permission granted to residents shall be in writing and signed by the manager. A copy shall be given to the resident and a copy placed in his/her file.
- Residents must provide the Authority with written indemnification for any installations, which will protect the Authority from claims in the event of damage to property or injuries to others.
- All satellite dishes must be installed by an installation company, not by the resident or a friend or relative of the resident.

- Installations may be from inside a unit but only if it does not require the removal of a child window guard unit and only if it does not obstruct or remove a means of egress from the unit.
- There must be no penetrations of window sills, frames, or exterior walls. There may be no roof installations at all. Installations on balconies are permitted if there is no penetration of the flooring or roofing materials.
- Installations cannot be made which conflict with Historical District Codes (may apply to the South End).
- The type of installation most likely to receive management permission is a type, which works outside a window using tension bars. Interior installations may also work.

9.2.2 Window Air Conditioners

Residents must seek permission to install window air conditioners. Permission shall be granted conditional upon 1) placement in a room, which has two other means of egress and 2) proper and secure installation. As a general rule, no more than one air conditioner should be approved for up to a two-bedroom apartment and no more than two air conditioners for apartments of three or more bedrooms. Exceptions to these rules may only be granted based upon approval of a reasonable accommodation request (managers are not required to approve all reasonable accommodation requests and should do so only when the request seems legitimate and reasonable).

9.2.3 Kitchen and Bathroom Fixtures/Other plumbing

Residents may request permission to install their own kitchen cabinets/sinks or bathroom vanities/sinks. Generally, these requests should not be granted, as the BHA will be required by regulatory agencies to maintain these tenant-installed items. The items are not stock items and will create issues of obtaining stock when broken.

Residents may also run water piping to install a washing machine or dishwasher. **This is not permitted.**

9.2.4 Electrical Fixtures and Outlets

Ceiling fans are a common resident installation; occasionally more serious violations of the lease occur when residents run wiring to operate an electric dryer or other equipment. Managers should use judgment in determining whether or not ceiling fans or other substitute fixtures should be allowed and only permit it when the installation is done by a licensed electrician. **Managers should never permit new wiring to be run.**

9.2.5 Gas Dryers

Occasionally, residents have teed off existing gas piping to run piping for a gas dryer. **This is never allowed** and must be removed at the resident's expense when found. The removal may be done by BHA staff with a charge to the resident.

9.2.6 Locks

Residents may install their own front entry door locks only if permitted by the manager and only if they provide the manager with a key. **Locks may never be installed on interior doors**, such as bedroom doors.

9.2.7 Wall & Ceiling Coverings/Stucco/Paneling

Generally, the BHA does not permit any wall covering, other than paint, which should be BHA provided off white or a light neutral color purchased and installed by residents. Restrictions include drop ceilings, wallpaper, contact paper, stucco or other plaster-type finish, paneling, or tile of any kind. If such installations are made, they may only be made with the manager's permission.

9.2.8 Additional cable or phone outlets

The BHA has provided all apartments with one phone outlet and one cable outlet. Many residents request that they be allowed to install additional outlets. This may be allowed, but only if the manager is provided with specifications/drawings of how the work is to be accomplished and is satisfied that the work would not be destructive. It is generally not acceptable to run surface wiring throughout the apartment or to drill holes in floors, ceilings or walls.

9.2.9 Exterior items and fixtures

Residents with private yards may wish to install fencing, pools, permanent barbecue grills, sheds, trees/shrubs and other items. Pools are regulated by the lease and must not exceed the size allowed. Fencing at some developments is allowed, but managers should have a set of standards for all fencing and permission can only be granted if requested in writing. The installation of small plant material [annuals/perennials] may be allowed with manager's permission at some developments, but managers should have a set of standards for all plant installations. As a general rule, plantings must not obstruct walkways or roads, must not obstruct views posing safety/security concerns, must not interfere with pedestrian traffic or be a nuisance to other residents and must not penetrate unintended surface. All plantings installed must be properly maintained. BHA discourages the planting of vegetable gardens at any development, as they tend to attract rodents. As with all plant material, residents must obtain permission to plant vegetable gardens and managers must set standards. Large permanent grills are not allowed. Decks may be installed which are not affixed to the building, and only with the manager's permission.

9.2.10 Washers and Dryers

Washers and dryers are automatically allowed in apartments with hook ups. Washers and dryers are not allowed in elderly developments. Permission to use washers, which attach to sinks, may be granted, but this permission must be based on the manager's knowledge of whether or not the waste drain system can handle the excess water. Permanent washer hook ups are not allowed. Dryers that require 220 voltage or gas lines that do not normally exist in the apartment are not permitted.

All dryers must be appropriately vented to the outside. If vented through a window, the window must be equipped with an appropriate insert to accommodate dryer venting. All interior venting is prohibited.

9.3 Appendices to this Chapter

Appendices to this Chapter can be obtained on the Fam/Eld S:Drive in the folder labeled **SOP Appendices**, in the sub-folder labeled **Chapter 09 – Tenant Installs**. Appendices include policies and sample Resident Citation form etc. **Note:** appendices are subject to addition and change at any time.

PART TWO: REGULAR CUSTODIAL, LANDSCAPE AND PEST MANAGEMENT MAINTENANCE

Chapter 10 Introduction to Custodial Maintenance

Regular custodial maintenance involves all of the day to day work completed by Janitor/Groundskeepers (J.G.s), Laborers, Special Assignment Laborers (SALs) and Resident Custodians. Sometimes, contractors are hired to supplement this work. The work of custodial maintenance is very important to the appearance of the developments, the health and safety of residents, employees and visitors, and to the longevity of surfaces. In this Part, the following topics are covered in each chapter:

- Buildings and Grounds Inspections
- Hallway and Common Area Maintenance and cleaning standards
- Grounds and Landscape Care
- Snow Removal
- Trash Removal
- Pest Management

However, Laborers, JGs, SALs and Resident Custodians play a part in many of the other activities covered by this manual, including work orders, vacancies, and preventive maintenance. Custodial maintenance provides the backdrop and the backbone to all of the other work completed by maintenance. Custodial maintenance always includes aspects of Repairs (Part 3) and Preventive Maintenance (Part 4). It is a very critical aspect of maintenance at the BHA, and one in which the BHA is heavily invested both in personnel and equipment.

10.1 Roles and Responsibilities

Custodial maintenance is structured differently in the family and elderly/disabled developments.

At the Elderly/Disabled Sites, most custodial maintenance is performed by live-in Resident Custodians, who are members of the Teamsters Union, and a lesser amount is performed by Laborers and Janitor/Groundskeepers (JGs). Resident Custodians report directly to the Manager of the development. At the Family Sites, most custodial maintenance is performed by JGs, Laborers and SALs, who are members of the Laborers Union. This staff usually reports to the Maintenance Superintendent.

At the Family Sites, some developments have Crew Leaders, also members of the Laborer's Union, to whom some of the Laborers and JGs report. In all sites, contractors may perform some amount of this work especially extermination and landscaping.

Also, in some regions in the past – developments have pooled together staff [JGs and Laborers] from one or more developments to form crews to perform certain custodial maintenance tasks at sites within the region that have participated in this scheme. These crews are supervised by one or more crew leaders, reporting directly to the Program Maintenance Supervisor (PMS). These crews were primarily assembled to assist developments accomplish certain custodial maintenance tasks [primarily landscape care] in a more efficient and more effective manner.

The work of the custodial staff includes hallway and common area cleaning, including elevators, basements and other space; initial clean-out of vacancies and final housecleaning of vacancies; delivery of stock to tradespersons; assisting tradespersons with work orders; grounds and landscape care; daily inspection of grounds, common hallways and other areas to check for safety and needed repairs; snow removal;

extermination (licensed laborers only); truck driving; operation of skid loaders and other equipment (given the appropriate license); trash removal; assistance to the Manager to deliver notices, check residents' complaints, etc.; and other work.

10.2 Standards and Expectations

The standards and expectations for each of the custodial tasks and areas are outlined in the following chapters. As a general matter, the BHA strives to maintain development and grounds at the highest possible level of cleanliness, to perform regular inspections to check on safety and repair requirements, to remove snow quickly and thoroughly, to rid all developments of pests, and to turn over vacancies which are very clean.

It is incumbent upon each of the Resident Custodians, SALs, Laborers and JGs to hold themselves to the highest possible standards. It is the responsibility of their supervisors to insure that this occurs.

10.3 Scheduling, tracking, inspections & reporting

Proper scheduling of custodial work is very important. Managers and Superintendents need to lay out a daily and weekly schedule of activities for all staff to insure that both routine and non-routine custodial maintenance activities are performed in the timelines expected. For instance, the daily schedule might call for all staff to report to grounds clean up first thing every morning starting with the cleanup around the solid waste containers. The weekly schedule would include common hallway inspections, vacancy clean outs, mowing and trimming the grass, weeding planting beds, watering lawns, sweeping parking lots, cleaning stairwells and other work. Each of the chapters in this section contains information on scheduling work. In Part 4 of this Manual scheduling custodial maintenance activities for preventive maintenance is outlined in greater detail [Refer to Chapter 37]

Schedules should be adhered to as much as possible, but must also be flexible. Emergencies and weather conditions, as well as staff absences make it necessary for workers to move off schedule when necessary. However, if there is no schedule, work required is likely to be put off – maintaining schedules helps to keep work on track. Landscaping activities, in particular, must be scheduled in accordance with the seasons; most landscaping activity builds on previous activities and must be completed in order.

For those Regions that have crews in place, it is important that Superintendents and Landscape Crew Leaders and/or crew supervisors [which are usually the Program Maintenance Supervisor (PMS)] communicate on a regular basis to discuss weekly schedules, scope of work, task performance, special projects etc. It is important that the Superintendent knows what work the crew will perform and when this work will be performed in order to be able to plan for and schedule work that will need to be performed by the in-house staff.

Custodial workers perform regular inspections of common areas using the Building & Grounds Inspection Short Form [or the Laborers Combination Inspection and Cleaning Form] and all custodial work needs to be inspected by supervisors. These quality control inspections by Managers/Maintenance Superintendents insure that work is up to expectations and provide an opportunity for supervisors to work with staff who may not be meeting the standard.

Work performed by landscape crew as well as outside contractors should be tracked on maintenance service reports and all work should be monitored and inspected by the Manager/Maintenance Superintendent. Any issues arising from the regional crews should be reported directly to the Crew Leader or PMS. The succeeding chapters contain more detailed information on service reporting and tracking for various custodial maintenance tasks. Copies of maintenance service reports to track work performed by crews and contractors can be obtained in the SOP Appendices folder on the Fam/Eld S:drive.

10.4 Appendices to this Chapter

Appendices to this Chapter can be obtained on the Fam/Eld S:Drive in the folder labeled **SOP Appendices**, in the sub-folder labeled **Chapter 10 – Intro. To Cust.** **Note:** appendices are subject to addition and change at any time.

Chapter 11 Buildings and Grounds Inspections

11.1 Requirements for Inspections

All buildings and grounds inspections must be performed utilizing Massachusetts State Sanitary Code (MSSC) and HUD Uniform Physical Conditions Standards (UPCS). In instances where the two are different, BHA will adhere to the more stringent standard. These standards are itemized in this chapter.

11.1.1 Weekly Walk-through Building and Grounds Inspections, Short Form

Buildings and grounds must be checked every day by custodial maintenance staff as well as management supervisory staff. On at least a weekly basis, the Walk-through Inspection short form [i.e. the Weekly Building and Grounds Inspection forms, the Laborers Combination Inspection and Cleaning forms or the Resident Custodian's Schedule and Report Forms] must be used and all problems recorded. The format for these forms (which may be customized by development) can be found in S: Drive, SOP Master - Bldg Systems Appendices, Chapter 11 and SOP Appendices, Chapter 11.

The daily/weekly inspections specifically check for lighting problems, leaks, litter, graffiti, tripping hazards, other hazards, or other work required. Playgrounds and other play areas must be inspected daily for hazardous conditions. All graffiti and hazardous problems must be immediately reported and corrected. Staff shall use short-form inspection reports for these inspections.

Certain additional forms, such as the playground/bench/fence inspection form and the annual dumpster survey form may supplement these walk through forms. A master copy of the weekly walk through form should be maintained in the development's Systems Inventory book and online [Refer to Part 4, Chapter 24 for information on how to create this book]. Completed copies of all weekly inspection forms may be filed in loose-leaf binders or in file folders in chronological order.

11.1.2 Formal Quarterly Building and Grounds Inspections, Long Form

The BHA requires formal buildings and grounds inspections to be conducted quarterly by Manager/Maintenance Superintendents, using the Building and Grounds inspection long forms for each of the following areas:

- Health and Safety deficiencies for all inspectable areas
- Building exterior inspection for each unique building address
- Site inspection for each contiguous site
- Each interior common area where access is limited to BHA employees (utility rooms, boiler rooms, etc.)
- Each common area that is regularly accessed by residents and/or the general public.

The quarterly inspection form includes much more detail than the walk-through short forms and can be found in the S: Drive, SOP Master - Bldg. Systems Appendices, Chapter 11 and SOP Appendices, Chapter 11. A work order to perform the B&G quarterly inspections is required for each building at every site including non-residential buildings. The Maintenance Systems Manager will run a B&G report monthly so Regional supervisors can monitor the progress of the site staff.

All deficiencies found during any inspection shall be transferred to work orders for correction as either emergency or Building and Grounds priorities. Work order numbers for all deficiencies shall be recorded on the B&G inspection form for tracking purposes.

All Building & Grounds formal quarterly inspection reports shall be maintained in the Annual Service Record Binder for each fiscal year or at large sites in a separate B&G binder.

11.2 Purpose of Inspections

Buildings and grounds inspections are part of the basic preventive maintenance plan of every development. The objective is to increase the probability of early detection and correction of problems in the development's systems and building components through regular and frequent inspections.

The daily and weekly walk through inspections should catch graffiti as well as any safety and/or health hazards, which need to be corrected immediately, as well as any on-going needs for maintenance or repair. The formal quarterly or annual inspections are a more thorough version of the daily/weekly walk through inspections. These will take longer and are designed to inspect for any and all possible deficiencies.

11.3 Standards for Building Common Areas

The following lists the standards for all common building areas. These standards incorporate state sanitary code requirements, HUD REAC requirements and the BHA's own standards for common area maintenance.

11.3.1 Health and Safety

- No mold or mildew
- No propane, natural gas or methane gas odors
- No sewer gas odor
- No exposed wires or openings in electrical panels
- No water leaking, puddling, or ponding on or immediately near any electrical apparatus
- No elevator misalignment with the floor of more than $\frac{3}{4}$ " which causes a tripping hazard
- No blocked or unusable fire exits
- No missing exit signs and must have illumination in the area of the sign
- No improperly stored flammables
- No garbage or debris storage in areas not meant for staging or storing or excessive amounts
- No general defects or hazards that pose risk of bodily injury
- No sharp edges that could cut or break skin or other bodily harm
- No tripping hazards, at least a $\frac{3}{4}$ " rise
- No signs of insect infestation, no live signs, tools of IPM are allowed
- No signs of rodents – sightings, rodent holes or droppings, tools of IPM are allowed

11.3.2 Lobby/Entrance

Floors

- No bulging or buckling
- Floor covering intact
- No seams showing base material
- No evidence of flooding or leaks
- No evidence of mold or mildew
- No evidence of rot or damaged sub-floor
- Free of obstruction; clean, waxed, swept
- Baseboards/cove base free of paint and splash marks

Tile

- No cracked or missing tiles
- No cuts or holes

Wood

- Finish intact
- No missing or loose boards
- No cracks greater than $\frac{1}{4}$ "

If painted no cracked or peeling paint

Carpet

Clean

Secure to floor and walls

No holes or tripping hazards

Painted Floors

No peeling, chipping or flaking paint

Cove base

Securely attached to wall

Not cracked or broken

Free of paint

Window - general

Opens and closes freely, easily

Stays open

Screens present and free of holes and tears

Caulking intact

Can be secured

Space between the prime window frame and sash is no greater than 1/16th inch at any point on the perimeter of the sash for double-hung windows; and no greater than 1/32nd inch for casement windows

Window - Frame

Good condition

No rust, signs of water penetration

Paint intact if present

No peeling, chipping or flaking paint on wood sills

Window - Glass

Present and unbroken

No fogging, seal intact

Not cracked or broken

Hardware intact- security pins present

Latches functional, move freely

Not painted over

Window guards

Present when required because of window height above grade

Does not prevent emergency egress

Walls

Smooth, paint surface intact

No peeling, chipping or flaking paint

No holes, no cracks

No evidence of water damage or leaks

No mold or mildew

No graffiti or other defacing

No buckling, bulging

Clean

Ceilings

No bulging or buckling

No holes

No cracks

Paint intact; no peeling, chipping or flaking

No evidence of current leaks
No evidence of water damage, staining
No mold or mildew

Mailboxes

Clearly identified, individual boxes secure
Mailbox bank secured (Post Office lock present and working)

Entry Door

No damage or holes
Glass intact if present
No rust
Lock mechanism is securely attached and working
Closing mechanism is operational
Door hardware secure
Closes on its own and latches properly
Opens and closes freely
Weather tight; any cracks between the wall and frame are completely caulked
Door frame no more than 1/16 inch larger than door at sides and no more than 1/8 inch larger than door at top or bottom
Weather stripping secure if present
Paint or other finish in good condition
Peephole functional
Door surface clean
Number present and clear

Fire Exits

Signs clearly marked and visible, properly lit
Un-obstructed

Lighting/Electrical

Fixtures in place
Working properly
Provides adequate visibility
Exit signs lit
Globe not cracked, or broken
Emergency lighting tested and working
No cracked, broken or missing outlet/switch plates
No exposed wiring

Signage

"No Smoking" Signs visible in lobby/at entrance and in good condition

Infestation

No signs of pests
Check all monitoring traps for signs of activity

11.3.3 Interior Hallways

Fire Extinguishers/Hoses

Located properly; in place
Current inspection tag for extinguishers
Hoses properly stored/no moisture evident

Fire Alarms, Smoke Detectors and Carbon Monoxide Detectors

Intact and Working properly

Fire pulls intact

Sprinkler System

Sprinkler heads intact with no paint or tape obstructing performance

No leaks or evidence of leaks visible

Piping system has no peeling, chipping or flaking paint

Floors

Free of obstruction

Clean, swept

No bulging or buckling

Floor covering intact

No seams showing the base material

No evidence of flooding or leaks

No evidence of mold or mildew

No evidence of rot or damaged sub-floor

Painted Floors

No peeling, chipping or flaking paint

Tile

No cracked or missing tiles

No cuts or holes

Carpet

Clean and free of stains

Secure to floor and walls

Seams secure

No evidence of leaks

No holes or tripping hazards

Cove base

Securely attached to wall

Not cracked

Free of paint and splash marks

Walls/Ceilings

Smooth, paint surface intact

No peeling, chipping or flaking paint

No holes, no cracks

No evidence of water damage or leaks

No mold or mildew

No graffiti or other defacing

No buckling, bulging

Clean

Lighting/Electrical

Fixtures in place

Working properly

Provides adequate visibility

Exit signs lit

Globe not cracked or broken

Emergency lighting tested and working

No cracked, broken or missing outlet/switch plates
No exposed wiring

Fire Doors

Closed or magnetic door open devices intact
All surfaces intact and clean
Un-obstructed

Refuse Chute

Clean/odor free
Doors properly close
Chute door gaskets provide effective seal
No evidence of pests, their parts or debris, no droppings

Signage

"No Smoking" signs visible and in good condition

Infestation

No signs of pests
Check all monitoring traps for activity

11.3.4 Stairway

Steps

Clear of obstruction
Structurally sound
Surface intact; treads secure
No sign of rust or corrosion

Railings/Balusters

Secure and firmly attached to the wall
Present on the open side of all stairways
Railing at least 36 inches in height
Securely attached; not wobbly
All balusters present, secure and not more than six inches apart.

Lighting/Electrical

Fixtures in place
Working properly
Provides adequate visibility
Exit signs lit
Globe not cracked or broken
Emergency lighting tested and working
No cracked, broken or missing outlet/switch plates
No exposed wiring

Fire Doors

Closed or magnetic door open devices intact
All surfaces intact and clean
Un-obstructed

Walls/Ceilings

Smooth paint surface intact
No peeling, chipping or flaking paint
No holes, no cracks
No evidence of water damage or leaks

No mold or mildew
No graffiti or other defacing
No buckling, bulging
Clean

Signage

"No Smoking" signs visible and in good condition

Infestation

No signs of pests
Check all monitoring traps for activity

11.3.5 Laundry Room

Clean
Working appliances
Adequately lit
Heated
Free of pests (especially look for signs of bed bugs)

11.3.6 Trash Rooms

Door securely in place
Adequate lighting
Clean
Ventilated and deodorized
Floors and walls meet standard
Free of pests (especially look for signs of cockroaches and rodents)

11.3.7 Utility Rooms

Door securely in place with working hardware
Locks operable
Adequate lighting
Drains covered and working properly
No leaks or evidence of leaks visible

11.3.8 Electrical Panel

Panel is accessible; not blocked
No sign of burning on breakers
No evidence of leaks or corrosion
No frayed wiring
No missing breakers
Panel cover in place
No opening or gap of more than ¼" between the internal cover of an electrical panel and the breakers or the internal cover and the housing of the panel
No storage in electric panel rooms

11.3.9 Elevators

Doors working smoothly
Tracks/sills on each floor clean of debris
Adequate working light
Floor buttons working properly
Telephone system working properly

Floors/walls/doors clean and odor-free
Proper ventilation
Current inspection certificate
All cab indicator lights working
Hallway call buttons working properly
Ceiling intact

11.3.10 Basements

Basements must be clean and cared for at all times. The following standards apply to all basements:

- Designate one or two areas for storage - storage may not be scattered throughout basements
- All drains at the entrance and in the basement are clear and fitted with appropriate covers
- No leaks apparent of any kind
- Adequate lighting operated off switch near doorways
- Emergency lighting tested and operable
- Clear of all debris, litter and dirt
- Washed down and deodorized at least annually
- No broken windows/broken glass/sharp edges
- All windows properly secured with ventilation holes adequately covered with wire mesh or screening to prevent any kind of animal intrusion
- Painted walls/floors are not peeling, chipping or flaking
- All doors locked at all times to prevent illegal entry
- All doors unobstructed, undamaged and closing properly
- Exit signs clearly marked and visible, adequate lighting
- Basement stairs free of obstruction, structurally sound, surface intact and treads have no sign of rust or corrosion
- Railing secured to wall with no sharp edges, worn, peeling, chipping or flaking paint
- No signs of pests
- Check all monitoring traps for activity

11.4 Standards for Exterior of Buildings

11.4.1 Exterior Doors

Hinges, locks, latches working
Glass in place
Frames not warped, unbroken
Free of graffiti or other defacing
Fits properly; weather-stripping in place
Surface stained or painted
No peeling, chipping or flaking paint
No rust
No holes
Closes on its own and latches properly

11.4.2 Building Exterior

No foundation gaps or cracks more than 3/8"
No bricks or large pieces of mortar missing from foundation
No foundation spalling or exposed rebar
No cracks or gaps in walls wider than 3/8" and longer than 6"
No deterioration of the surface, missing bricks, exposed rebar

No missing mortar
Free of graffiti
No peeling paint
No satellite dishes attached to the building exterior
"No Smoking" signs visible by all exterior entrances/on building exterior

11.4.3 Lighting/Electrical

Fixtures in place and working properly (night survey once yearly)
Provides adequate visibility
Globe not cracked, broken or missing
Vegetation is not obstructing fixtures

11.4.4 Intercoms

Operable
Current resident list or apartment numbers

11.4.5 Roofs

Surface material/ membrane unbroken
Stacks, vents free of obstruction
No debris on roof
Gutters and downspouts clear, secured and covered
Roof drains clear, unclogged
No ponding
No tree branches hanging over or impacting roofs
Roof exhaust fans operable with no visible damage

11.4.6 Porches, Patios, Balconies

Structurally sound
In good repair
Painted
Trash and litter-free
Rodent-free
Railing of at least 36" in height if more than 30" above the ground
Balusters intact, not more than 6" apart, if more than 30" above the ground

11.4.7 Windows

No broken or cracked glass
Sills and frames undamaged
Glazing intact
No peeling paint
Security bars present when required and properly hinged
Screens intact, not torn

11.4.8 Window Wells

Litter-free, grates secured
No ponding or stagnant water

11.5 Standards for Grounds

11.5.1 General Site/Site Drainage

No erosion
No ruts in excess of 5 inches deep
No erosion causing water to pool in a confined area
Storm drains unobstructed and functional
Development signage in good condition

11.5.2 Parking Lots

Litter-free
No abandoned or inoperable vehicles
Striped
No cracks larger than $\frac{3}{4}$ " wide
No cracks with height differential more than $\frac{3}{4}$ "
Adequate drain, no ponding accumulation of excess water/ice collection in a depression
No broken glass
No potholes presenting tripping hazards

11.5.3 Driveways, Sidewalks, Stairs, Ramps

Surface material sealed, unbroken
Free of obstruction
No cracks greater than $\frac{3}{4}$ "
No cracks with height differential greater than $\frac{3}{4}$ "
No potholes that present tripping hazard
No tilting of cracked areas
Handrail present and secure for four or more steps
No flaking, chipping or crumbling areas on sidewalk
No underlying reinforcing material exposed
No heaving/settlement presenting a tripping hazard
No ponding/accumulation of excess water/ice collection in a depression

11.5.4 Lawns

Litter-free / hazard free
(Refer to Chapter 13 for more information)

11.5.5 Trees, Shrubs

Dead, damaged, broken branches removed
No obstructed walkways or roads
No obstructed views posing safety/security concern
No obstructed views of potential other safety hazards (i.e. broken windows)
No interference with pedestrian traffic or pose a nuisance to residents
No penetration of an unintended surface such as a building, roof, gutters or downspout, HVAC units, window frames or fences
No signs of pests especially rodents
No safety hazards
(Refer to Chapter 13 for more information)

11.5.6 Playgrounds

Clean / no litter, broken glass, foreign objects
No exposed footings
No loose or worn connections
Free of graffiti
Adequate mechanically sound equipment
Equipment surfaces durable, painted, safe, no sharp edges, functioning as intended
Surface is not deteriorated and presenting a hazard
Fibar/playground mulch is not depleted
Use of special playground inspection form required

11.5.7 Exterior Lighting

Fixtures in place and working properly
Adequate security lighting
No broken bulb or fixtures
No tree branches obstructing fixtures (wall mounted or free standing)

11.5.8 Trash Areas

Free of debris
Containers in good repair, covers present and working
Container and enclosure free of graffiti
Containers sanitized
Enclosure adequate and in good repair
No pest activity visible

11.5.9 Fences

Painted if intended to be; otherwise intended finish intact
Posts, rails and fabric in good condition
Gates working properly
Not falling or leaning
No holes

11.5.10 Benches

Intact, in good repair
Painted or stained if intended to be
No exposed footings presenting tripping hazards
No sharp edges; exposed nails etc.

11.5.11 Drying Yards

All poles and fixtures intact, poles not cut off above ground level if removed
No exposed footings presenting tripping hazards
No sharp edges; exposed nails etc.

11.5.12 Retaining Walls

Intact, not falling, damaged, or leaning
Not a safety risk

11.6 Appendices to this Chapter

Appendices to this Chapter can be obtained on the Fam/Eld S:Drive in the folder labeled **SOP Appendices**, in the sub-folder labeled **Chapter 11 – B&G Inspects**. Appendices include Building and Grounds Inspection forms. **Note:** appendices are subject to addition and change at any time.

Chapter 12 Hallway and Common Area Maintenance & Cleaning Standards

12.1 Responsibility and Schedule

It is the maintenance superintendent's responsibility to insure that Janitor/groundskeepers and laborers work to a regular schedule so that it is possible to thoroughly clean all hallways at least weekly. Weekly should be frequent enough to maintain a reasonable level of hallway cleanliness. During daily walk through inspections (noted in chapter 11) the staff person performing the inspection should note any cases where residents have littered or damaged the property, and note any instances where bags of trash have been left in the hallway. The staff person should go through the bag of trash in order to identify the resident. All such cases should be reported to the manager who needs to take immediate action to notify the resident of the lease violation, including a private conference if necessary. The manager is responsible for maintaining records on such lease infractions so repeat offenders can be dealt with.

Scheduling of hallway cleaning must be done in such a way that it is certain to be done each week despite inevitable interruptions for snow removal, back ups and other emergency work.

12.2 Standards

- The following standards should be given to each laborer/janitor/groundskeeper and reviewed in meetings. A properly cleaned hallway generally requires the following steps:
- Sweep down from the top landing to the bottom all loose dirt and debris. Use a scraper to remove all gum while sweeping. On rubber tiles use the product lift off which freezes gum and then remove. Recommend use of portable scrubbers using GFI plug and GFI extension cord.
- Using a bucket of water (preferably hot) with disinfectant soap and rags, wash down all walls within reach from top to bottom, particularly areas where dirt tends to collect or residents tend to run their hands when walking up and down stairs.
- It is very important to use clean water. If hot water is too inconvenient, use cold. However, you can try to obtain hot water from: a vacant apartment in the building or nearby, a resident's apartment if you can find a cooperative resident in the hallway, by adding draw-offs to hot water piping in basements (planned plumbing work), or other methods which may work at your site.
- Using a spray bottle with window cleaner and paper towels, wash all windows and the hallway entry doors
- Three or four times per year, wash the outside glass on windows where the windows tilt in
- Using bucket and mop, and disinfectant soap, wash down all stairs and floors from top to bottom. Water may need to be changed more than once. Wax VCT tile halls. Put out Wet Floor caution signs.
- Be sure to use a cleaning product that leaves a pleasant odor when complete.
- Be sure to put out wet floor caution signs during work.
- VCT tile should be finished with a coat of wax.

12.3 Appendices to this Chapter

Appendices to this Chapter can be obtained on the Fam/Eld S:Drive in the folder labeled **SOP Appendices**, in the sub-folder labeled **Chapter 12 – Hallway Maintenance**. **Note:** appendices are subject to addition and change at any time.

Chapter 13 Grounds and Landscape Care

13.1 Introduction to Grounds and Landscape Care

The level of grounds and landscape care that is needed at each BHA Development will vary significantly depending on the size of the grounds and the scope of green space installed. How the grounds of each development appear from the outside is very important and is a very critical component of custodial maintenance and of the janitor/groundskeeper's, laborer's and resident custodian's daily routine. However, though positive curb appeal is an important goal for the BHA, we also must strive to maintain our grounds and landscape to the highest possible standards for the health and safety of our residents, employees and visitors and for the longevity of our landscape and grounds elements.

In order to increase the curb appeal at each site, Property Managers and/or Superintendents may hire outside Landscaping Contractors to carry out special landscaping tasks (Lawn Services; Arboriculture Services; Shrub Pruning etc.) or one-time large seasonal assistance (Spring Clean-up; Mulching; Fall Clean-up) in order to supplement their existing grounds keeping staff. This will depend on budget availability and it is important that all other routine and non-routine grounds and landscape maintenance tasks are completed by the on-site staff.

In the family program, some Developments have established Landscape Crews in an effort to accomplish landscape maintenance tasks in a more efficient and effective manner. The landscape crew is usually comprised of staff [JGs and laborers] from 2 or more developments within the program that work together as a team to perform various set landscape maintenance tasks at each development participating in this scheme. These crews are supervised by one or more crew leaders, reporting directly to the Program Maintenance Supervisor [PMS]. It is important that Superintendents and landscape crew leaders and crew supervisor - PMS communicate on a regular basis to discuss weekly schedules, scope of work to be performed by landscape crew, task performance, special projects etc. It is important that all other routine grounds and landscape maintenance tasks outside of the predetermined scope of work are completed by the on-site staff. Services performed by landscape crews should be tracked and recorded. Refer to Fam/Eld S:Drive, SOP appendices for a sample master Landscape Maintenance Service Report form that can be used for this purpose.

Though this chapter covers both grounds and landscape elements, outlining both grounds and landscape maintenance timelines and guidelines, the majority of this chapter is devoted to landscape maintenance standards and procedures. The procedures described are summary direction only, please refer to **the *Landscape Manual for On-Site Personnel*** for detailed information on all aspects of landscaping for public housing

13.2 Use of Contractors

If Property Management decides to use outside assistance for landscaping care they will need to budget for landscape contracts and tree contracts accordingly each year. For many developments, landscaping contractors will most likely to be hired for:

- Arboricultural Services - Tree maintenance (For Example: Tree Pruning; Removals, Fertilization; Disease/Pest Treatment; Health Analysis)
- Lawn Care (For Example: Lawn Maintenance – Mowing/Trimming and/or Lawn Treatments – Fertilization; Weed Control; Pest/Disease Control; liming etc)
- One time seasonal landscape improvements (For Example: Spring Cleanup; Mulching; Shrub Pruning; Fall Leaf Pickup & Removal etc)

Or a combination of these tasks, depending on your Budget, your site's requirements and staffing circumstances.

If hiring an outside Contractor, it is recommended that you use the *Request for Quotation Bid/ Specifications packages available for Landscape Maintenance*. These packages are tools to control quality and scope and were formulated to assist you in your request for quotations to ensure that you are requesting standard professional services from Contractors and the Contractors are all bidding on an identical scope of work. These packages can be accessed on the Public Folders, P:Drive – SOP Appendices or from the Landscape Management Coordinator.

It is also recommended that when seeking bids for landscape maintenance services you use contractors that are listed on the Statewide Contractor Listing FAC23 for *Grounds keeping/Landscaping and Snow Removal Services*. This contract consists of a pre-qualified list of contractors, each of which offer Athletic Fields/Turf Services, Grounds keeping/Landscaping Services, Irrigation Services, Snow Removal Services and/or other Related Services. You can access the latest listing from the Procurement Department web page or the Landscape Management Coordinator.

If you hire outside contractors for landscape maintenance activities it is important that you track and record services rendered. You should keep track of when the contractor performed these services, who performed these services, what services were performed etc. Supervisors should inspect the work performed by contractors to insure that all tasks were completed as stated and are in compliance with the specifications set forth in the bid/specification package. It is particularly important to track and record this information so that in the event of an invoice dispute, you have the back-up information to reconcile the situation. There is a service rendered report in the appendices that you can use.

Another important point to note when using outside Contractors for landscaping services – all debris generated for any landscape maintenance activity must be removed from property and disposed of in a legal and responsible manner. BHA trash receptacles and dumpsters should not be used by the Contractor for disposal of any organic debris.

13.3 Grounds and Landscape Elements

The main elements of all BHA Development's landscape include lawns; trees; shrubs; perennials and seasonal annual flowers. However, other grounds elements such as walkways, parking lots, driveways, dumpsters, trash receptacles, stairways, ramps, stairwells, window-wells, drying yards, entrance ways, fences, benches, signage, catch basins, playgrounds, tot-lots and basketball courts etc are also critical to a development's curb appeal and must be well cared for at all times.

13.4 Annual Cycle of Grounds & Landscape Care Activity

An annual Landscape Maintenance Plan / Calendar shall be included in each development's annual preventive maintenance plan (Refer to Chapter 37). Sample plans/calendars can be found in Public Folders, P: Drive, SOP Master Building Systems Appendices folder.

Some grounds and landscape care is dependent on the seasons and an annual cycle of grounds and landscape care activity takes place each year. However, trash pick-up and removal from all areas –both grounds and landscaped areas is an activity that must be performed on a routine daily basis by on-site staff – at the start of each day regardless of the time of the year. All areas must be cleared of debris and checked for graffiti or significant damage daily. Any problems, damage or graffiti must be reported to Manager/Supervisor. All graffiti and hazardous conditions must be immediately corrected.

Over the winter months, grounds care usually involves Snow and Ice Removal as well as daily trash pick up and removal (Refer to Chapter 14 - Snow Removal). Most landscape care activities run from March through November each year. The following cycles are guidelines to help you in planning timelines and schedules for the grounds and landscape needs of your Development. The actual timelines for landscape care may vary depending on actual weather conditions.

13.4.1 Guidelines for General Grounds Activities

Year Round

- All grounds [and landscaped areas] including but not limited to all walkways, parking lots, driveways, dumpsters (or other trash collection areas), stairways, ramps, stairwells, window-wells, drying yards, entrance ways, fences, benches, signage, catch basins, playgrounds, tot-lots and basketball courts parking lots, etc should be routinely inspected and maintained daily throughout the entire year. All graffiti, damage and potentially hazardous conditions must be immediately reported and corrected. [Refer to Chapter 11 for defined standards for grounds).

March - December

- ⌚ Playgrounds and tot lots inspection and maintenance must be carried out on a daily basis from March through December (as long as children are utilizing them). Conduct formal play area inspections on a quarterly basis. Report any hazards immediately. If play equipment is damaged and posing a potential hazard, take the necessary steps to repair it as soon as possible. If play equipment can not be repaired and made safe it should be removed. [Refer to Chapter 11 for defined standards for playgrounds]
- ⌚ For newer playgrounds, it is recommended that the Installation Company and/or manufacturer perform annual inspections. They will do this for a small fee and provide a list of repairs to make to maintain the equipment up to code.
- ⌚ Fence inspections should be part of the daily inspection routine. Hazards should be reported immediately and repaired as soon as possible. A formal inspection must be conducted quarterly. If fences are damaged and posing a potential hazard, take the necessary steps to repair them as soon as possible. If fences can not be repaired and made safe they should be removed. [Refer to Chapter 11 for defined standards for fences]
- ⌚ Benches are part of the daily inspection routine. A formal inspection must be conducted quarterly. If benches are damaged and posing a potential hazard, take the necessary steps to repair them as soon as possible. If benches can not be repaired and made safe they should be removed. [Refer to Chapter 11, for defined standards for benches]
- ⌚ Use the playground/fence/bench inspection form provided [See Public Folders P: Drive, SOP Master Building Systems Appendices folder] in addition to the regular walk-through and quarterly inspection forms to track and record inspections and make note of conditions and any necessary repairs/corrections that may be necessary.

13.4.2 Cycle of Landscape Activities / General Guidelines

January - March

- Maintenance pruning of large trees by a Certified Arborist should be scheduled in January and should be completed by the end of March. However, hazardous reduction pruning or tree removal can be carried out at any time of the year as needed. All large tree work should be contracted out to certified arborists who are specialists in the care of trees and are equipped and trained to provide proper care in a safe and professional manner and will help you maintain your valuable investment. There is a Tree Pruning Request for Quotation Bid/Specification Package for Tree Care Services and a listing of Massachusetts Certified Arborists available for you to use when contracting out tree care services. This information is available on the P-Drive, SOP Appendices or may be obtained from the landscape management coordinator [Refer to section 13.11 for more information on tree care]

- Maintenance pruning of many species of shrub plantings can also be scheduled during the winter/early spring season. If plants are not grown for their flowers often the best time for pruning is during the dormant winter season before new growth begins in the spring. If you are not sure whether shrubs on your property are flowering shrubs or not, you should not prune during the winter month. Pruning spring-flowering shrubs during the dormant season will remove flower buds formed the previous fall [Refer to section 13.11 for more information on shrub care]

Late March – May 15th

- Spring cleanup and mulching usually begins in March [or once the snow has finally melted] and is completed by April 30. It is very important that all planting areas are mulched immediately after the beds have been spring-cleaned. This will greatly help you in suppressing weed growth.
- Edging of planting beds can be carried out twice during the growing season; the first edging should be carried out in the Spring (prior to mulching) and the follow up edging in late summer/early Fall as necessary
- Preparation of flower beds and mulching of planting beds and flower beds is usually carried out in April and May with a target of May 15 completion
- Fertilizing of lawns should include two treatments, plan for one application in early Spring (April) and one in late fall (October-November). Massachusetts Water Resource Authority (MWRA) supplies the BHA with fertilizer – Bay State Fertilizer – at no cost. Blank order forms can be found in the SOP Appendices folder on the P-drive
- Weed Control of turf areas is seasonal. Plan on applying pre-emergent weed control treatments Mid-April to Early May.
- Lime can be applied in the Spring or the Fall but should be applied at the same time every year. For optimal results, do a soil test before you apply lime.
- Grub control timing is dependent on type of grub and type of control product used. Grub control can be applied as early as April or as late as August [or even later – depending on product used]
- Lawns can be spot seeded in April
- Mowing & trimming of lawns starts sometimes as early as April and usually ends in mid-November. This is a routine landscape maintenance task, which must be scheduled weekly.
- New trees, shrubs and perennials can be planted between April - May
- Roses can be pruned in March-April
- Spring flowering shrubs should be pruned immediately after blossoms fade, late Spring –Early Summer. [Examples of spring flowering shrubs -Forsythia bloom in April; Lilacs bloom in May]
- Broken, dead, diseased and low hanging tree branches should be pruned regardless of the time of the year. Tree root suckers can be pruned close to the base of the tree any time of the year.

May 15th – Early October

- Finish pruning spring flowering shrubs immediately after blossoms fade, late Spring –Early Summer.
- Prune evergreen shrubs and hedges during the Summer months [June – August]
- Prune summer flowering shrubs immediately after blossoms fade
- Broken, dead, diseased and low hanging tree branches should be pruned regardless of the time of the year. Tree root suckers can be pruned close to the base of the tree any time of the year.
- Planting of seasonal summer annual flowers [Geraniums, marigolds, petunias, impatiens, coleus, salvia etc] in pots and flower beds is usually completed between May 15 - June 30
- Flower care and maintenance (watering; feeding; deadheading; fertilizing etc) starts as soon as they are planted and ends in October with clean up of annual flower beds
- Weed Control of hardscaped/pavement areas – cracks and crevices usually starts in May and ends in November. This is a routine landscape maintenance task, which must be scheduled weekly.
- Weed Control of planting beds usually starts in May and ends in November. This is a routine landscape maintenance task, which must be scheduled weekly.
- Plan on mowing & trimming all lawn area through November or whenever the grass stops growing. Lawn mowing and trimming is a routine landscape maintenance task, which must be scheduled weekly.

- Fertilizing of lawns should include two treatments, plan for one application in early spring (April) and second application in late Fall (October-November)
- Watering of lawns usually starts in June and ends mid. September (this task is very dependent on the weather). Estimate that your established lawns will require at least 1" of water per week to supplement rainfall. This is a routine landscape maintenance task, which must be scheduled weekly.
- Water all newly planted trees and shrubs planted within the last 3 years - June, July & August.
- Weed Control of turf areas is seasonal. Plan on applying Broadleaf weed-control treatments between May 15 to July 1st.
- Grub control timing is dependent on type of grub and type of control product used. Grub control can be applied as early as April or as late as August [or even later – depending on product used]
- Lime can be applied in the Fall [if not already carried out in the Spring], but should be applied at the same time every year. For optimal results, do a soil test before you apply lime.
- Core aeration of lawns can be carried out in either the Spring or the Fall. It is preferable to aerate in the Fall just before overseeding your lawn areas.
- Spot-see lawns as needed September-October
- Seasonal Fall Color [Mums, Kale, Pansies, Asters etc] can be planted as early as August but usually after Labor Day.
- Order your Spring flowering bulbs to plant in October

Late October – December

- Spring Bulbs - tulip, daffodil, crocus etc. are usually planted in October each year (or up until the ground freezes)
- Leaf clean up usually starts in mid October and can run through December. Remember that the more clean up done in the fall, the less cleanup there is to do in the spring!
- Broken, dead, diseased and low hanging tree branches should be pruned regardless of the time of the year. Tree root suckers can be pruned close to the base of the tree any time of the year.
- Prepare all landscaped areas for snow removal activities [Refer to Chapter 14]

13.5 Introduction to Grounds and Landscape Maintenance Procedures

General grounds maintenance procedures are relatively straightforward. All areas both hardscape and greenscape must be inspected and cleaned daily [refer to Chapter 11 for more information on grounds inspections and standards]. Cleaning means – the pick-up and removal of trash, debris, broken bottles, rocks, weeds, any foreign objects etc from all lawn areas, planting areas, play areas, dumpsters, trash receptacles, parking lots, walkways, driveways, stairways, ramps, stairwells, window-wells, drying yards, entrance ways, catch basins etc. There is an assortment of tools available through Central Stores that will enable staff to perform grounds maintenance efficiently and effectively. Tools may include brooms, shovels, trash barrels, trash pickers, jumbo dust pans, rakes, leaf blowers, leaf vacuums, power brooms, sweeper etc. Staff should use the right tool for the right job to meet the cleanliness standards expected. For example staff should use rakes to pickup and remove debris from lawn areas and planting areas but should use brooms to pickup debris and properly clean all paved areas. Using rakes to clean paved areas is not efficient or effective!

It is very important that groundskeeping staff are vigilant about inspecting their grounds for graffiti, damage and potentially hazardous conditions daily and must report these conditions to the Manager/Superintendent. All graffiti and hazardous conditions must be corrected immediately. Hazardous conditions may include exposed nails in fences and benches, sharp edges in benches, fences and play equipment, exposed footings, loose or work connections on play equipment, broken/dead tree branches etc.

Staff must always wear the appropriate personal safety clothing and accessories when performing grounds and landscape maintenance procedures. [Refer to Chapter 3].

The following sections outlines guidelines on all basic landscape maintenance procedures – which includes Spring cleanup and mulching, lawn maintenance, lawn care, weeding, shrub and tree care, flower care, Fall leaf pickup and removal and spring bulb planting. It is important that all procedures are followed to the best of our ability in order to attain and maintain the fundamental landscape care standards expected. It is the responsibility of supervisors to insure that this occurs. These sections primarily provide summary directions please refer to **the *Landscape Manual for On-Site Personnel*** for more detailed information on all aspects of landscaping for public housing.

13.6 Spring Clean-up

Spring clean up is a very important function of grounds maintenance. Both the Property Manager, Superintendent and maintenance staff must be very diligent about groundskeeping at this time. The work and planning carried out at this time is crucial to the appearance of the grounds during later months throughout the growing season. Spring clean up includes the hard raking of grass, manually weeding of planting areas; incidental pruning of dead/damaged branches from shrubs and trees, dead shrub removal; picking up litter and debris from all turf and planting areas; sweeping hardscaped surfaces of debris and sand from winter and preparing flower beds.

The City provides sidewalk pick up of yard debris each spring and fall, see Public Folders, P-Drive – SOP Appendices for information.

13.7 Importance of Definition and Mulching

The use of the term "definition" in landscaping refers to clearly defined separation between different elements of landscaping. A good urban landscape plan needs to include as sharp as possible definition between lawn areas and sidewalks, lawn areas and shrub beds, lawn areas and trees, and so forth. All turf areas, planting beds and tree rings should be edged to redefine the line between the all grass areas and planting beds every year.

All trees; shrubs and flowerbeds should be mulched every year. Trees should get new mulch every other year. Applying mulch is a good conservation practice as well as being aesthetically pleasing. A 3" thickness of mulch will help prevent loss of top soil from wind and water erosion; reduce soil compaction, suppress weed growth; decrease water loss from the soil through evaporation; lessen soil temperature fluctuations and, as they decompose and become incorporated in the soil, improves soil composition. Take care not to over-mulch, or mound mulch up around the basal stems of the plantings as this can be detrimental to the health of your plantings and trees. Listings for Mulch Vendors can be obtained in the SOP Appendices folder on the P-Drive, contact the landscape management coordinator for an updated listing.

13.8 Care of Lawns

Good lawn maintenance practices are an important goal for all BHA Developments. This requires a lot of attention on the part of the Property Manager, Superintendents and groundskeeping staff. Mowing has a major impact on lawn appearance and health. All lawn areas should be mowed & trimmed on a weekly basis.

Lawn maintenance includes routine weekly routine tasks - watering, mowing and trimming and seasonal tasks - liming; fertilizing, weed control treatments, disease and pest control treatments; core aeration, spot seeding etc. A detailed schedule for each area of lawn maintenance is provided in the Landscape Manual. Certain lawn care treatments require the applicator to hold a current Massachusetts pesticide applicator's license. If you do not have an employee on hand that holds a current pesticide applicator's license, you may

need to hire a professional lawn care company to perform appropriate lawn care treatments during each growing season. All chemical applications must be applied in accordance with Current State and Federal Regulations. Also, it is important that all lawn areas are posted after the application of lawn care pesticide treatments.

Though there are many products on the market that will control weeds in lawn areas, a weed-free ornamental lawn is not a high priority in public housing grounds. Time and money would be better spent on fertilizing and maintaining good cultural practices (mowing frequently at proper height with sharp blades on dry no wet grass, raking and removing leaves, aerating, and watering as needed). Refer to Chapter 16 for information pertaining to obtaining and renewing pesticide licenses.

Massachusetts Water Resource Authority (MWRA) supplies the BHA with fertilizer – Bay State Fertilizer – at no cost. Blank order forms can be found in the SOP Appendices Folder on the P-Drive.

Some basic guidelines on proper lawn mowing techniques:

- Before mowing -it is important that Staff/Crew walk & police all lawn areas and pick up debris — sticks, rocks, glass, wire, bottles etc. — that can be thrown by the mower.
- The staff /crew should be using string trimmers, **before** mowing. The mower will chop the trimmings and reduce the need for raking. At each mowing, all grass edges including plant bed edges, at sidewalks, curbs, walls, light posts, fences (both sides), signage or other vertical elements in lawn areas should be trimmed.
- Line trimmers should not be used to cut grass against the bark of trees. This will damage the bark, often severely enough to kill the tree. Instead, establish a grass-free, mulched area around the tree so that close trimming is not necessary.
- Lawns should be mowed two to three inches above the soil line. Grass cut to this height shades the soil, helps keep weeds from establishing themselves, and promotes deeper roots and drought survival.
- When mowing the lawn, never remove more than 1/3 of the total leaf area at any one time. Removing more than 1/3 of the leaf area severely injures the turfgrass plants and reduces their ability to withstand additional environmental stresses.
- It is important to have a sharp mower. Dull blades fray the leaf tips, turning them brown. Dull mowers also take more power or fuel to operate. Mowing equipment should be well maintained. Sharpen blades after every third mowing, or, at the least, once a month
- Mow grass when it's dry. Wet grass cuts unevenly, and requires raking to remove the matted clippings, which smother the grass. Cutting wet grass also promotes the growth and spread of disease organisms.
- Rake up clumps. Leave small and finely chopped clippings on the lawn where they will decompose and improve the soil's health but remove clumps that can smother the grass. Sweep clippings off sidewalks and driveways for a neat appearance. A leaf blower may also be used for this cleanup task.
- If your staff /crew are using mowers without bags – and are mowing grass in areas adjacent to planting/flower beds – make sure that they mow in a direction so that the grass clippings are NOT shooting into the planting areas, otherwise you are creating more problems for yourself – as you will have grass/weeds growing in your planting beds.
- If your lawn areas have turned brown and are dormant, they should not be mowed.

Supervisors must inspect all lawn areas regularly after the staff and/or landscape crew has performed lawn maintenance tasks to ensure that proper procedures are being adhered to as directed.

13.9 Weeding Planting Beds and other areas

Keeping all planting beds, tree mulch beds, flowerbeds and flowerpots free from weeds is an important goal for all BHA Developments. Weeds are not only undesirable and detracting from the curb appeal of your site, but also are in competition with other desirable plantings for water; nutrients; oxygen etc. We must strive to routinely carry out this task, to the best of our ability. Grounds keeping staff must be reminded about the

importance of weeding planting areas on a routine basis. **Remind staff that if we don't pull the weeds now they will go to seed & multiply your misery by a thousand times next year!!!**

Planting beds, tree mulch beds, flowerbeds & flowerpots at all locations should be regularly weeded as part of the grounds staff's routine grounds keeping and landscape maintenance tasks. Mulching your planting beds will also help suppress weed growth. Central Stores stocks weeding tools [such as an 'action hoe'] that will enable staff to perform this task more easily and efficiently. Supervisors must inspect these areas after the staff and/or landscape crew has performed weeding tasks to ensure that this task is performed as directed.

13.10 Controlling weeds in hardscape areas

Weed control along building edges, pavements, courtyards, parking lots, fences etc. is also a very important BHA goal. Weeds greatly detract from the overall curb appeal of your property and we should make every effort to control weed growth in these areas on a routine basis.

Groundskeeping staff can control weed growth in hardscaped areas either by manually pulling them; removing using shovels or other tools or by chemical means. Chemical - herbicide treatments must be applied by personnel holding a current pesticide applicator's license [Refer to Chapter 16 and SOP Appendices folder on the P-Drive for information pertaining to obtaining and renewing pesticide licenses]. It is the license holder's responsibility to review the Material Safety Data Sheets [MSDS] for all chemicals and must read the product label carefully [Refer to Chapter 3 and the Pesticide Applicator Training Manual]. Regardless how your staff/crew performs this task, please make sure that all debris generated by this activity is removed. All areas must be swept and cleaned-up after this task has been performed. A leaf blower can also be used to clean these hardscaped areas. Prioritize this task for your staff/crew. The most visible areas along Development perimeter would be top priority and should be weeded first and then work your way throughout the property to the best of your staff's ability to try and accomplish this tedious task on a routine basis. Managers/Maintenance Superintendents must inspect these areas after the staff and/or landscape crew have performed weed control tasks in cracks & crevices to ensure that this task is completed and proper cleanup procedure are being adhered to as directed.

13.11 Care of Shrubs and Trees

Proper care of trees and shrubs is an important goal of the BHA and all Developments need to be diligent and vigilant about monitoring our trees and shrubs and strive to maintain them for health, safety and aesthetic reasons to the best of our ability.

Shrub and tree care can include pruning, edging, mulching, watering, fertilizing and pest/disease treatment. One of the most important means of maintaining trees and shrubs is through pruning. The general objective of pruning plantings is to produce strong, healthy, attractive plants and reduce hazardous risks. By understanding how, when and why to prune, and by following a few simple principles, these objectives can be achieved.

In general – particularly important in public housing, vegetation should not negatively impact the use of the property by residents, employees and visitors. Overgrown vegetation should be selectively pruned away from entryways; doorways; pathways; buildings; roofs; windows; signs; lighting etc - so not as to interfere with pedestrian traffic; building envelope or obstruct views. [Refer to Chapter 11 – Building & Grounds Inspections for the defined standards set]

As the BHA does not have a certified arborist on board, the majority of large tree care services are contracted out to outside arboricultural contractors. Trained in-house staff can perform some incidental tree

pruning work and/or removal work of small caliper trees, if they can do so safely. Any staff performing tree care services must exercise extreme caution and must wear the proper personal protection equipment [Refer to Chapter 3]. In-house staff should never perform tree work near power lines – this must only be carried out by professional trimmers qualified to prune around power lines.

The following sections outline some minimum standards for tree and shrub care that we must make every effort to strive to accomplish for safety, health and aesthetic reasons.

Refer to **the *Landscape Manual for On-Site Personnel*** for detailed information on all aspects of landscaping for public housing.

13.11.1 Shrub Care

Pruning shrub plantings is important as it helps us to control the size of the shrub, direct growth, influence flowering/fruiting, rejuvenate old, overgrown plants and maintain plant health & appearance. In public housing developments we also need to prune our shrub plantings for security/safety reasons. Shrubs left unpruned can be a nuisance and/or pose a hazard. Shrubs that are not pruned may interfere with pedestrian traffic, obstruct views, screen children in play areas, be a security concern if overgrown along window areas, entranceways, doorways, near light fixtures etc. [Refer to Chapter 11, Buildings & Grounds standards for the defined standards set for trees and shrubs].

Overgrown shrubs should be selectively pruned and thinned-out to prevent screening potential hazards. Shrubs should be maintained at a height below window levels. Shrubs should be selectively pruned to maintain views particularly around tot-lots and drying yards etc. Shrubs also need to be pruned to maintain the necessary clearance from buildings and windows etc. Broken, dead or diseased branches should be removed as soon as possible no matter what time of year.

Hand pruning, using hand pruners, is the preferred pruning method in many instances, as it allows you to selectively prune branches without changing the plants' natural form. If you prune using this method, you will likely only have to prune shrub plantings once a year as a general rule. If your on-site staff and/or landscape crew plan to prune your shrub plantings using shears, you may have to plan on pruning more than once a year to maintain this formal shape. Remember shearing shrubs into hedges may require more work to maintain their size and shape and often does not allow you to achieve all pruning objectives.

Regardless of pruning method, on-site staff and/or landscape crew must remove the clippings - all debris generated from the pruning activity from the shrubs and surrounding areas as soon as this pruning task is completed. If clippings are left on the shrubs, they will turn brown and look very unsightly and will detract from the good work you were trying to accomplish.

All Pruning tools -hand or power should be kept clean and sharp at all times. On-site staff and/or landscape crew should wear safety gear when performing pruning and other landscape tasks at all times. Safety gear includes gloves, eyewear, ear protection & back protection etc [Refer to Chapter 3,]

Supervisor must plan on inspecting all areas after the staff have performed pruning tasks to ensure that this task is completed and proper cleanup procedure are being adhered to as directed.

The following is a general guideline for proper shrub pruning timelines: -

- **Late Spring/Early Summer** – Prune spring flowering shrubs immediately after their blossom fade.
- **Summer** – Prune or shear deciduous or evergreen hedges. Prune summer-flowering shrubs as blossoms fade
- **Avoid pruning in Late Summer/Early Fall.** - As this may force late growth that will not have a chance to harden off before winter and will be damaged by freezing.
- **Late Winter/Early Spring** – Often the best time to prune many shrubs is in fact early spring, while the plants are still dormant. Avoid pruning spring-flowering shrubs during the dormant season as this will remove flower buds formed the previous fall

13.11.2 Tree Care

Proper care of trees is an important goal of the BHA and all Developments need to be diligent and vigilant about monitoring our trees and strive to maintain them for health, safety and aesthetic reasons to the best of our ability. There are some minimum standards for tree maintenance outlined in the following sections that we must make every effort to strive to accomplish for safety, health and aesthetic reasons. [Refer to Chapter 11, Buildings & Grounds standards for the defined standards set for trees and shrubs].

Property Managers, Superintendents, Landscape Crew Personnel and on-site staff need to be vigilant about looking out for obvious potential tree hazards on your property on a routine basis. Any obvious hazards such as dead, broken, split, diseased branches or split trunks or trunk cavities etc should be noted on the weekly inspection short form or the formal quarterly building and grounds inspection long forms. Note the address location and describe the potential tree hazard. See Public Folders, P-Drive – SOP Appendices for Tree Hazards Checklist - Consider these questions when determining if a tree on your property is posing a potential hazard.

On-site staff should contact their Property Manager/Superintendent to inform them immediately. If the situation can not be handled by your in-house staff or landscape crew safely using the proper personal protection equipment as is necessary - Superintendents or Managers must contact a professional certified arborist as soon as possible. A listing of Professional Certified Arborists and a Request for Quotation Bid/Specification package for Tree Care Services can be obtained on the Public Folders, P-Drive – SOP Appendices, or from the Landscape Management Coordinator.

The Arborist can determine what maintenance work is required in order to reduce hazards and maintain tree health. You can request that they give you a quote for recommended maintenance work. If you need to contract out emergency tree work as a tree is posing a potential hazard – you only need to seek one quote. For all other planned tree care services you need to use the Request for Quotation Bid/Specification package for Tree Care Services and seek at least three bids [These packages can be obtained in the Fam/Eld S:Drive, SOP Appendices folder]. All tree removal should include stump grinding, if access for equipment is feasible - otherwise request that the tree gets cut flush to the ground so you do not create a tripping hazard. Remember only professional tree trimmers qualified to prune around power lines should perform tree work near power lines.

It is important that low hanging branches or branches obstructing views or penetrating unintended surfaces are pruned on an on-going basis to reduce potential safety hazards. As a general rule, tree canopies should be raised to allow a minimum of 8' clearance over all sidewalks/pathways etc and a minimum of 15' clearance over street surfaces and 3 to 4' from exterior lights. Sucker growth from the base of your trees should be pruned using hand-pruners.

Sites that have staff available and who are trained and equipped to performed tree care services safely in-house with the appropriate personal safety protection equipment [Refer to Chapter 3] should plan for and schedule some tree work annually. All tree work should be scheduled using the work order system. Creating work orders will assist you with scheduling the work and tracking all work performed on trees in your Development. [Refer to Part 3 for more information on using the Work Order System]. A site map can also be used to mark and track work locations.

Property Managers – particularly Managers of sites with a large quantity of mature trees - who do not have staff available who are trained in tree work [or can handle the tree work safely] should plan on budgeting for contracting out some tree care services annually. The amount of tree maintenance work that sites can accomplish will largely depend on budget availability and on the other critical needs of the Development. Sites should prioritize hazard reduction tree work and may have to request safety pruning services over maintenance pruning services. Sites can contact a professional certified arborist for assistance in developing a scope of work for tree care services, prioritizing hazard reduction pruning and removals. Arborists will

usually come to your property - evaluate your trees, recommend maintenance services and give you an estimate free of charge. You can use this estimate to put together a scope of work (as budget allows) to insert into the *Request for Quotation Bid/Specification package for tree care services* - to use when seeking quotes for planned tree care services. Sites can also contact the Landscape Management Coordinator for assistance on this process.

Regardless of budget availability it is critical that at a minimum we are vigilant about inspecting trees for obvious potential hazards on an on-going basis and take the necessary steps to correct the situation. It is important that all tree work performed is tracked and recorded either by using the work order system and/or the landscape maintenance service reporting method. Tracking tree work performed will assist you with tree care management for your Development. [Refer to Part 4, Chapter 37 for more information on tracking landscape care for preventive maintenance]

13.12 Planting Annuals and Perennials

The most important aspects of any landscape plan are trees, lawns and shrubs. However, perennial and seasonal annual planting is a wonderful addition. Flowers can add an attractive visual appeal and can help make public housing look and feel welcoming and well cared for. Property Managers and/or Superintendents should determine together where flower beds and pots should be placed. It is better to plant a few beds and/or pots of flowers in places that are highly visible and take good care of them than to plant a lot of flower beds and fall behind on maintenance. See Public Folders P-Drive, SOP Appendices for recommended vendor listings or contact the Landscape Management Coordinator. The Landscape Coordinator can also provide assistance with selecting flowers for your Development.

13.12.1 Annuals

Many annuals require "dead-heading" and all flowerbeds require regular watering and weeding. It is also important to "feed" flowerbeds regularly to insure good growth. Property managers and supers should keep in mind the additional labor that will need to be invested in maintaining annual flowerbeds before deciding how many to plant each year. Remember: poorly maintained flowerbeds can create a major negative impact on a developments curb appeal.

Designing flowerbeds is also very important. Simply designed flowerbeds are easiest to maintain. Planting beds with only 2 or 3 varieties of annuals and colors can have a powerful dramatic impact. Note the sunlight conditions of your planting bed. Most annuals will do better in full-sun. If the planting area is in shade or part shade make sure you select annuals that can tolerate these conditions.

- Annual for sunny locations: Geraniums; petunias; marigolds; dusty miller and salvia
- Annuals for shady locations: Coleus; wax- begonias and impatiens

13.12.2 Perennials

Though initially perennials cost more than annuals they are a much better investment than seasonal annual plantings in the long run. Perennials die back to the ground in winter but come back year after year in the springtime. Perennials require less maintenance than annuals because they do not have to be planted every year or fertilized as often during the growing season. The flowering times of perennials vary depending on the species chosen. You can plant perennials in early spring and they will flower in the spring, summer or fall. Like annuals, perennials have sunlight requirements. Some prefer full sun; others can tolerate part shade or even full shade. Note your planting beds light conditions before you order your perennials.

Each variety of perennials, given the right conditions, will flower for several weeks of the growing season. It is also recommended when selecting perennials, chose a type that has attractive leaves as the flowers will not be around for the whole season. Some perennials are planted just for their attractive foliage as opposed to their flower color. Another advantage in utilizing perennials in your flowerbeds is the fact that every year

they grow back bigger and bigger. Perennials usually will need to be divided every three years; the newly divided plants can be transplanted to other areas around the development.

- Perennials for sunny locations: Daylillies; Rudbeckia [black-eyed Susan]; Sedum [stonecrop]; Iris; Asters; Echinacea [coneflowers]; heuchera [coralbell] and ornamental grasses.
- Perennials for Shady locations: Hosta; astilbe; ferns and phlox

13.13 Fall Leaf Pick-up and Disposal

Groundskeeping staff will begin raking leaves in mid-October and will keep raking until the first snow falls. Leaves must be raked from all areas – landscaped areas and paved areas. It is important to remove leaves near entrance ways, stairways, ramps etc first to avoid any potential slips and falls if leaves become wet. Leaves should also be removed from catch basins so that they don't clog up the drains. Leaves should be removed from gutters and downspouts. A thorough leaf pick-up in the fall will mean significantly less clean up each spring. Yard debris must be disposed of in the appropriate manner. There is a restrictive pick-up and disposal of leaf/yard debris by the City of Boston. The Department of Environmental Protection has prohibited yard waste from Massachusetts's landfills and incinerators and we can therefore not use BHA dumpsters to dispose of any yard debris. Refer to SOP Appendices on the Fam/Eld S:Drive for information with regards to *Yard Debris Pickup and Disposal Options*.

13.14 Planting Spring Bulbs

Every fall, usually in October spring bulbs need to be planted. While many bulbs are perennials, none last forever and many are eaten by rodents each year. Plant bulbs in close groupings for dramatic effect. Find out what blooms when, and choose two or three types of bulbs that will bloom at different times. In New England, crocuses are the first bulb to bloom; daffodils will follow and tulips after that. There are many other types of bulbs as well, and Property Managers and Superintendents can consult the landscape manual and local garden shops for more information on what types are available and how to plant them.

13.15 Appendices to this Chapter

Appendices to this Chapter can be obtained on the Fam/Eld S:Drive in the folder labeled **SOP Appendices**, in the sub-folder labeled **Chapter 13 – Grounds Care**. Appendices include MWRA Bay State Fertilizer blank order forms; Recognizing Tree Hazards; Spring/Fall Yard debris/leaf pickup and disposal options; Vendor/Contractor Listings; Request for Quotation Bid and Specification Package for Landscape Services; Landscape Maintenance Service Reports; BHA in Bloom Spring Guidelines; Fall Task Guidelines; master BHA Landscape Care Review forms; Sample annual Landscape Maintenance Calendar etc **Note:** Appendices are subject to addition and change at any time.

Chapter 14 Snow Removal

14.1 Introduction to Snow Removal

Snow and Ice Removal is an important aspect of Resident & Employee Safety for the Boston Housing Authority. All Developments must strive to maintain high snow removal standards and follow proper procedures before, during and after every snow/ice storms. All developments must have a snow plan prepared no later than October 15th. This Snow Plan must be submitted to the Assistant Director of Property Management or Regional Manager annually. All snow removal equipment and supplies must be on hand no later than November 1st each year. [Refer to Chapter 37 – Regular Custodial Preventive Maintenance for more information on scheduling activities for Snow Removal and maintaining service records]

Consider using Bobcat blades and other Bobcat attachments to make snow removal more efficient.

14.2 Creating a Snow Plan:

Use a Site Map of the development to make a Snow Removal Plan. Plot Snow Removal Priorities as follows (color code on site map):

- Priority 1: Emergency vehicle lanes
- Priority 2: Fuel Dumps
- Priority 3: Primary Building Entrances from door to nearest cleared walkway or street
- Priority 4: Fire Hydrants
- Priority 5: Management Office; Maintenance shop; Service Centers (Day Care; Health Centers); Community Rms.
- Priority 6: Roof Walkways between penthouses where there are Fire Exits w/automatic release doors
- Priority 7: Sidewalks
- Priority 8: Secondary means of entrance
- Priority 9: Dumpsters
- Priority 10: Parking areas
- Priority 11: Storm drains

14.3 Preparation for the snow season

- Mark Hydrants with 4' Stake painted red
- Mark Storm Drains
- Use Snow Fences or stakes/reflectors to identify outlines of non-fenced in areas in order to protect the landscape from snow removal equipment/materials.
- Identify area for snow to be placed – do *not* dump snow on shrub plantings
- Have all Snow Removal Equipment available and serviced and have been tested to make sure that they are in good working condition including:
 - ⌚ Truck(s) with plow
 - ⌚ Bobcat(s);
 - ⌚ Snow Blower(s)
 - ⌚ Sander(s)
 - ⌚ Spreader(s)
 - ⌚ Shovel(s)

Have all necessary Supplies in stock

- Sand
- Salt
- Ice Melt
- Gasoline for the Snow Blowers
- Wet Weather Gear (If you usually use it)
- Back Supports
-

Have an Employee Listing available – identifying the following

- Truck Driver w/plow operators - detailing driver license information
- Bobcat/Skid Loader operators – detailing hoisting license information
- Other Equipment Operators
- Employees Home Phone Numbers

Insure access to keys:

- Set of keys for Truck(s)
- Equipment storage gates
- Maintenance, Management Office etc
- Indicate where keys will be located

Resident shoveler listing – provided by Task Force detailing the following information.

- Resident Shoveler Name
- Resident Shoveler Address
- Resident Shoveler Telephone numbers
- Resident Shoveler Social Security Number

Efficient paperwork processing is essential to ensure prompt payment for the snow shovelers – this is their incentive in providing us with this service. Have time sheets available and fill out upon work completion and submit immediately.

Local Back-up Contractors listing (see below)

14.4 Snow Removal Standards

- All staff performing snow/ice removal procedures must be provided with the appropriate training, gear and equipment
- All Equipment Operators must follow appropriate equipment inspection procedures prior to operating any piece of Equipment.
- All Equipment Operators must follow proper procedures and use extreme caution during equipment operation.
- Snow and ice removal must be accomplished according to the priority order outlined in your Snow Removal Plan.
- Sidewalks, steps etc need to be cleared of snow from curb to the inside edge of the sidewalk or steps
- Cleared means that snow is fully removed and adequate salt/ice melt is applied to prevent icing, permit safe foot traffic and prevent slipping/fall hazards.
- Be careful to use ice melt/salt adequately at the recommended rates but not overuse it – overuse can create slipping hazards; be detrimental to vegetation (Lawn, plantings etc) and deteriorate hardscape surfaces (sidewalks, curbs, steps etc.)
- Use sand on all newly constructed walkways; sidewalks; stairs; ramps etc. Do not use salt products. Avoid using ice-melting products unless necessary to permit safe foot traffic.
- In situations of Slushy Snow – be particularly cautious about overnight freeze up possibilities
- Remember your Power Equipment Safety Training Classes – practice caution before, during and after operating any equipment.

- Protect your Back – Wear Back Supports
- Plowing shall be performed for all driveways, parking lots and sidewalks, which may be large enough to accommodate a plow.
- Plowing shall be performed in a safe manner so not as to damage property or persons.
- When plowing, make sure that snow/ice is piled in such a way as to take into account possible subsequent storms, which may require additional snow piling.
- When plowing, make sure that it has been carried out to the lowest possible level of snow/ice remaining on the ground.
- After every snow/ice storm, all snow/ice removal equipment must be wiped down and cleaned thoroughly. Trucks & Equipment should be free of salt and sand. Augers should be clear etc.
- Any ice-melting product spills, sand spills, (or any other spills) should be dealt with immediately.
-

Refer to Public Folders, P: Drive – SOP Appendices for *Snow Removal Standards and Safety Reminders Poster* – copy and post in the maintenance shop and on the employee bulletin board

14.5 Snow Storm Problem Solving

During snow removal it is important that Supervisors are outside on the grounds as much as possible to oversee snow removal activities and problem solve. Report to your Assistant Director for Property Management or Regional Property Managers if any problem arises regarding equipment or completing snow removal work in a timely manner. Assistant Directors and Regional Property Managers will assist with problem solving and supplying additional resources if necessary.

14.6 Snow and Ice Storm Tracking/Record Keeping

The Property Manager or Maintenance Supervisor must fill out the *Snow/Ice Storm Personnel/Equipment/Material Data Sheet and Snow/Ice Removal Checklists* for EVERY snow/ice storm. Form can be obtained in the Public P-Drive, SOP Appendices Folder. A copy of these documents must be kept on file at the site and a copy must be forwarded to your Program Maintenance Supervisor along with your overtime slips. PMS will review all documents for accuracy and forward a copy to the Landscape Coordinator [in a timely manner] to file in the Master File. These documents are tools to track and record all snow/ice removal activities. Accurate recording of data is critical as the information on these documents will be submitted to Federal Emergency Management Agency [FEMA] for major storm reimbursement costs.

14.7 Use of Snow Removal Contractors

Have a list of Snow Removal Contractors at hand. It is recommended that when seeking bids for snow removal services that you use contractors that are listed on the Statewide Contractor Listing FAC23 for *Grounds keeping/Landscaping and Snow Removal Services*. This contract consists of a pre-qualified list of contractors, each of which offer Athletic Fields/Turf Services, Grounds keeping/Landscaping Services, Irrigation Services, Snow Removal Services and/or other Related Services. You can access the latest listing from the Procurement Department web page or the Landscape Management Coordinator. Prior to the snow season, call to update files – see if the contractor is interested in doing work at your site this year. Have the contractor provide data detailing Equipment availability and rates for:

- Bobcat loader
- Bucket Loader
- Backhoe
- 4 Wheel Truck w/plow

- 6 Wheel Truck w/plow
- 10 Wheel Truck w/plow
- Loader
- Spreader

Provide the contractor with as much Site detail as is necessary - site maps w/color codes of priority areas and ask for rates. The contractor may provide rates per hour (i.e. for equipment and driver) or may provide a price per storm (depending on inch range for the storm). You must obtain Certificates of Insurance from the contractors and forward a copy to Risk Management. The certificate should show the BHA as an additional insured on the general liability insurance. Open a site-based purchase order, using site-based purchase order procedures after obtaining the necessary quote(s) etc.

If used during a storm, superintendents will need to document the arrival/departure of contractor and # of pieces of equipment used and verify that the prices on the bill correspond with that stated on the quote provided by the contractor prior to authorizing payment in accordance with procedures.

The BHA has had poor relationships with snow removal contractors in the past due to inefficient paperwork processing; it is imperative that we do not have any unnecessary delays in getting these contractors paid.

14.8 Snow Plan – Major Storm

If a major storm is predicted, which may impact the ability of staff to get to work, and will be of more than usual duration, special preparations are required. The following outlines aspects of that preparation:

14.8.1 Plot plan identifying and prioritizing the following

- Emergency Lane Vehicle Access
- Access for Fuel Deliveries
- Emergency assistance for Residents and Personnel – Identify location of Storm Center (usually the management or maintenance office)

14.8.2 Storm Center

Create a Storm center headquarters for staff and residents:

- Post Address
- Post Telephone Number
- Post Maintenance Telephone Number
- Post Emergency Telephone Numbers
- Plot Storm Center Location on Site-Map

14.8.3 Storm Center Supplies

Maintain supplies for staff that may need to remain on site for the duration of a large storm:

- Canned goods and hand operated can opener
- First Aid Kit – medical supplies
- Hot and cold drinks, water
- Flashlights and batteries
- Means of heating food and water without electricity
- Cots or air mattresses
- Blankets
- Pillows

- Rain gear
- Extra jackets and other warm clothing

14.9 Appendices to this Chapter

Appendices to this Chapter can be obtained on the Fam/Eld S:Drive in the folder labeled **SOP Appendices**, in the sub-folder labeled **Chapter 14 – Snow**. Appendices include Snow Removal Standards poster; Snow/Ice Storm Personnel/Equipment/Material Data Sheet; Snow/Ice Removal Checklists etc. **Note:** appendices are subject to addition and change at any time.

Chapter 15 Trash Removal

At most developments, trash removal is completed via the pick up of dumpsters on a three day per week schedule. Two, six and ten-yard dumpsters are located throughout the development for residents to put trash into. The BHA owns and maintains these dumpsters and the City of Boston arranges their pick up through various city contractors.

At a few sites such as Gallivan and Fairmount (row-house style developments), trash is picked up weekly at curbside in the same way it is for most residential neighborhoods. This is also true at the ME McCormack and West Newton Street developments.

Elderly developments use a variety of trash storage systems, including compactors, barrels, and dumpsters. Those developments, which use compactors, must maintain the compactors, the chutes and dumpsters used in the process.

This chapter deals with regular care and maintenance of dumpsters, city regulations dealing with dumpsters, pick up of items not permitted in dumpsters, rental of thirty-yard dumpsters and other issues.

Managing trash removal, and the storage of trash between city pick-ups, is a difficult task. Managers and superintendents are encouraged to try new methods of trash removal.

Refer to Chapter 37 – Regular Custodial Preventive Maintenance for more information on scheduling activities for Trash Removal and maintaining service records

15.1 Maintenance and Care of 6 and 10 Yard Dumpsters

The City has recently instituted a variety of new rules concerning dumpsters. The BHA is currently unable to meet each of these requirements, many of which require capital investment to achieve, but is working to do so.

As noted above, the BHA owns its own dumpsters and we are responsible for their maintenance. A properly maintained dumpster:

- Has working covers. Replace covers as needed with plastic/fiberglass type covers. Metal covers are too heavy for residents to open and close.
- Has covers closed at all times
- Has no signs of rust or graffiti and is painted cleanly (should probably be painted once per year)

All developments should budget each year for replacement of covers and dumpsters. The life span of a typical two, six or ten yard dumpster is probably three to four years if picked up three times per week. Dumpsters picked up less frequently may last longer.

The City now requires that all dumpsters be located within a fence or other barricade. This fence is supposed to be four sided, with one side a gate opening that can be opened for residents to put in trash and for the dumpster to be picked up. Dumpsters should also be located on a tar or cement pad for cleanliness purposes (not on grass or dirt). The BHA will work toward meeting these requirements at all sites. Many sites currently have three-sided dumpster enclosures.

Dumpster areas must be picked up and clean at all times. This will require that as one of the first tasks of each day, laborers and janitor/groundskeepers check dumpsters and clean up around them.

At least weekly, especially in the summer, dumpsters must be hosed down and deodorized. Deodorizing crystals may be obtained through Central Stores.

A Pest Management plan is required for trash areas. This generally includes cleanliness and proper installation of rodent bait stations.

As part of the Quarterly Building and Grounds Inspections, dumpsters and trash areas must be formally inspected. A separate annual survey of dumpsters is also required as part of the budget preparation process. [Refer to Chapter 37 for more details]

Yard waste (including leaves), white goods, hazardous waste and electronic appliances such as TVs, computers and VCRs can not be placed into dumpsters and dumpsters may not be emptied if these items are seen in them. See the next section for more information on these items.

Dumpster contractors (who work for the City) are responsible for picking up any trash, which may fall out of the dumpster when it is dumped. They are also supposed to pick up any large items (furniture, etc) which are left next to the dumpster to be picked up. Managers and superintendents are responsible for monitoring compliance with these rules. You should notify Boston's Sanitation division of any problems, including missed pick-ups. The Program Services Coordinator will assist managers and superintendents who do not receive an adequate response from the City.

15.2 Pick-up of Items Not Permitted in Dumpsters

Certain items may not be placed in landfills, and therefore, not in our dumpsters:

- Yard waste including leaves
- White goods – refrigerators, stoves and other large appliances such as dryers and washing machines
- Electronics – such as TVs, Computers and VCRs
- Hazardous waste such as paint, engine oil, etc

See Chapter 14 and SOP Appendices, P-Drive for more information on options for removal of leaves and yard debris.

White goods and electronics items must be stored in a separate area of the development for pick up by the City. The City will pick up these items as often as weekly if they are notified of where to pick them up. Call 617-635- 7573 for pick up of these items.

It is recommended that management remind residents of these rules and allow residents to set discarded items next to dumpsters. Maintenance can pick the items up from each dumpster site and move them to the central storage area until the city picks them up. Each development will have to be creative about dealing with this, as there is little space at most sites for such storage.

Refrigerators must have doors removed before they are placed outside for pick up.

As a general rule, dispose of hazardous waste by contacting a hazardous waste removal contractor. Small amounts of paint, etc., may be disposed of at periodic hazardous waste days held at various sites throughout the city. Contact the City's Department of Public Works to obtain schedules of these events.

15.3 Rental of 30 Yard Dumpsters

Thirty-yard dumpsters are rented periodically to deal with large trash removal needs. You may rent one to clean out a particularly bad apartment, to clean out basements, or for other reasons. Remember that the

same rules apply for these dumpsters as for 2, 6 and 10-yard dumpsters. Do not mix yard waste, white goods, electronics or hazardous waste with other debris in these dumpsters.

You can rent a thirty yarder for just one of these type items and have it dumped with just one kind of debris at a time.

Developments should estimate the number of times each year they will need to rent thirty yard dumpsters and budget accordingly. These dumpsters are rented for a flat rate, which changes from time to time. The rate for the period from now through March of 2003 is \$395

15.4 Recycling

Developments may wish to consider recycling as a way to reduce the amount of trash requiring disposal. The blue box method of recycling (in which residents place blue boxes with recyclable items on the sidewalk each week with their trash) is possible at row-house style developments where trash is picked up on a weekly schedule by the city.

Other developments will need to be more creative about recycling – creating, for instance, a central recycling area with appropriate storage barrels and bins for residents to use and arranging a pick up schedule with the City.

The City's recycling division is extremely interested in working with the BHA on creating opportunities for recycling in our multi-unit buildings. For more information contact them at 617-635-4959.

15.5 Appendices to this Chapter

Appendices to this Chapter can be obtained on the Fam/Eld S:Drive in the folder labeled **SOP Appendices**, in the sub-folder labeled **Chapter 15 – Trash**. **Note:** appendices are subject to addition and change at any time.

Chapter 16 Pest Management / Mold & Mildew

16.1 Introduction to Pest Management

Pest Management is one of the key routine maintenance activities performed by the BHA. The BHA's objective is to control pests in apartments, common areas, basements and grounds at all times.

As defined by the BHA, Pest Management includes:

- Performing yearly inspections to identify pests in BHA properties and determine the level of infestation.
- Raising the level of resident awareness of Pest Management techniques in apartments.
- Improving individual resident housekeeping levels when required to avoid pest infestation problems through education and lease enforcement.
- Improving and preventing general development conditions, such as litter and overflowing dumpsters that contributes to pest infestation by providing food, water and shelter for insects and rodents.
- Performing other maintenance tasks as necessary, such as blocking up holes that rodents can come through and repairing leaks, reducing or eliminating harborage where pests reside.
- As a last resort, chemical treatment to eliminate/control pest populations.

Management staff needs to work with residents to determine the most effective methods to use to eliminate pest problems. Although this section focuses on rodents and roaches and other insects, Managers will, from time to time, need to deal with other animals, such as feral cats or pigeons, as well. Bedbugs are a frequent problem. Work of Managers includes obtaining quotes from contractors, determining the frequency of inspections/treatments to control pests in the development and developing ways to increase resident awareness with either printed or verbal information.

Refer to Chapter 37 – Regular Custodial Preventive Maintenance for more information on scheduling activities for Pest Management and maintaining service records

16.2 Types of Pests

Types of pests that could be encountered in the Boston Housing Authority, include, but are not limited to:

- ants
- bats
- bedbugs
- bees/wasps
- birds
- carpenter ants
- cockroaches
- feral cats
- fleas
- flies
- grubs
- houseflies
- lice
- mice
- mosquitoes
- moths
- raccoons

- rats
- silverfish
- skunks
- squirrels/chipmunks
- termites
- ticks
- weeds

Roaches, rodents and bed bugs are the most prevalent problems at BHA developments. Fleas can be a problem, especially in basements where feral cats or rats have made homes, and in basements with a lot of moisture.

More recently, bedbugs have become a growing problem. Bedbugs, which seemed to be eradicated in the US after World War 2, are back and are a problem not just in BHA housing, but many other housing complexes, colleges, cruise ships and hotels/motels.

16.3 Control Methods

Integrated Pest Management (IPM) is a term used to reflect the use of a combination of pest control methods, including resident education, methods to exclude pests from individual apartments (i.e. caulking and otherwise sealing holes in walls and floors), site cleanliness, apartment cleanliness, baiting, trapping and chemical treatment. IPM is focused on using chemical application as a last resort, as chemical treatment may have adverse health effects on residents. The four basic IPM principles are (1) monitoring pest populations with sticky and pit fall traps to find out where pests are living and hiding, (2) blocking pest access and entryways, (3) eliminating food and water, and (4) applying low-toxicity, low-risk pesticides only as necessary to address problems. Chemicals will be applied only on an “as needed” basis. The need for chemicals will be determined by an initial thorough inspection and follow up monitoring of pest activity.

Methods of control depend on the problem. Many chemicals are on the market to control pests, primarily insecticides and herbicides. There are traps and poisons to control rodents. All means of chemical control must be performed by a licensed applicator, either in house or contracted out. Pests seem to develop a resistance to individual chemicals over time, and it is important to be aware of new kinds of chemical applications as they become available on the market. The use of “fogger bombs” to control pests, particularly roaches and bed bugs, in apartments is prohibited. Residents are not permitted to use fogger bombs, due to the danger of explosion. Residents’ use of any pesticide products should be highly discouraged. Many pesticide products available to the general public will counteract the low toxicity products being used by BHA contractors. While fogging is prohibited, dusting may be necessary in basements for treatment of fleas. Spraying for cockroaches is an application that is, also, discouraged but crack and crevice application of I.G.R.s (insect growth regulators) for cockroaches and bed bugs and spraying pyrethroids for bed bugs is allowed.

Poor housekeeping contributes to the pest problem. Therefore, resident education, preparation prior to the pest contractor’s visit and the use of housekeeping citations are important means to decrease pests in public housing and increase the efficacy of the pest contractor’s service call. Poor site cleanliness and inadequate trash/garbage storage also contribute to pest problems.

All Developments must incorporate IPM practices into their annual pest control contracts. The managers shall develop and implement an IPM plan as their budget permits. In order to be effective, IPM must be implemented in entire buildings [not random units] and it has been found that a yearlong contract vs. a partial year contract is more effective. The BHA specification now allows the manager the option to renew the contract for an additional year. This is at the discretion of the manager only. If the contractor performs per specification and has done a good job at controlling pests, the manager can opt to renew the contract at the same price as the first year of the contract. The use of the quotation sheet that accompanies the BHA IPM Spec will give the manager the tool to set up an IPM contract and set parameters for the numbers of units in the base contract to be initially inspected, frequency and number of units for return visits for monitoring and

treatments. There is a line item for common areas to be inspected and treated, initially and monthly in family developments and initially and quarterly in elderly/disabled sites. There are line items to include bed bug inspections, treatments and follow up inspections and treatments. If bed bugs are found in an apartment, the BHA policy and specification state that the contractor shall inspect and treat, if bed bugs are found, all apartments that about the bedbug infested apartment. See Bedbug Controls for a full description of the BHA treatment policy.

You can find the BHA IPM Spec and IPM quotation sheet (to be cut and pasted on a site based quotation form) in the S:drive, SOP folder, SOP appendices, Chapter 16, Pests and Mold, Pest Control Specs folder.

16.4 Use of In-House Staff

The BHA pays for pest control training and licensing of Laborers and Janitor Groundskeepers. All staff that have these licenses are permitted to perform chemical applications to control mosquitos and weeds.

When utilizing in-house staff make sure they have a valid Massachusetts pesticide applicator's license and it is on their person when performing pesticide applications on any BHA site. They must have the license on file with the Risk Management Department. Send a copy to the Maintenance Systems Manager and it will be scanned into the development and program folders in the SOP. Any employee who would like to become a licensed exterminator should contact the Maintenance Systems Manager. They will be supplied the materials needed to study for the test and the schedules for workshops and tests offered. The workshops and tests are given at the UMass Extension Center, Waltham. The Maintenance Systems Manager and the Risk Management Department will process paperwork necessary to acquire materials, schedule workshops and tests. The BHA will incur all initial costs but if the employee fails the first test, they must pay for any additional tests themselves. More information on how to obtain an applicator's license is contained in S:drive, SOP folder, SOP Appendices.

All license holders should have a copy of the Pesticide Applicator Training Manual on-hand and/or a copy in the maintenance office. License holders obtained this manual and all other study materials when they applied to take the license exam. All pesticide applicators are required to know basic safety and handling rules for pesticide use, this information is contained in this manual. Copies of the Manual can be obtained from the Maintenance Systems Manager. It is also the license holder's responsibility to review the Pesticide Label and Safety Data Sheets [SDS] for all pesticides products before commencing any pesticide treatments. [Refer to Chapter 3]

The BHA pesticide applicators should be performing West Nile Virus Treatments at all BHA developments on a yearly basis as requested by Suffolk County Mosquito Control. Only licensed pesticide applicators can apply chemical weed control in the BHA even if the product is available to the general public. BHA licensed pesticide applicators should perform all chemical weed control unless contracted out to an approved pesticide contractor.

16.5 Use of Contractors

Managers shall hire a contractor to perform a yearly IPM contract. The practice of hiring a contractor once or twice yearly to perform chemical treatments in every apartment has ceased. It has been proven time and time again that flush outs, also known as clean outs (chemical controls only) are not successful and pest populations continue to thrive. IPM addresses the need to remove pest food, water, and harborage; all necessary for pests to live.

Managers/Superintendents should contract with a licensed contractor from the state contract list. This contractor should be IPM certified and an awarded contractor in our Region – Boston is region 1. You may access this information on the website - <http://www.comm-pass.com> or in the SOP Appendices, Chapter 16 Pests and Mold, FAC#. All state contracts are updated or put out to bid on a regular basis so always check

the website before utilizing the state contracts to verify that there have been no changes. The # changes when new contracts are created, i.e. FAC92 is the present contract in 2017.

Other requirements when awarding a contract are the contractor must show evidence of skill at providing IPM services; at least 5 years of experience in providing pest control services; they must provide a certificate of Contractor's general liability insurance and worker's compensation insurance; they must provide all names of their pesticide applicators and copies of their current pesticide applicators' licenses to the property manager or tenants if requested. All pesticide applicators must be fully licensed as required by the state of Massachusetts, MGL Chapter 132B: Section 10.

The contract should not be awarded based on lowest price only. The contract should be awarded only when the contractor meets the minimum requirements, shows past performance, proposes a quality IPM plan and commits to perform as a partner at a higher level and finally on the quotation provided. The contract is not executed until the Memorandum of Understanding (MOU) is signed by the contractor and the BHA. This is a requirement of the IPM state contract. The MOU is an agreement between the eligible entity (Boston Housing Authority) and the contractor to perform IPM by following the specifications of the FAC# RFR. If the second year option is instituted, the MOU signed at the beginning of the contract is still valid. You can find the MOU template on the website - <http://www.comm-pass.com> or in the SOP Appendices, Chapter 16 Pests and Mold, FAC#.

Managers should share experiences with one another regarding contractors' performances. If a contractor is performing well at a particular development or is cutting corners every chance they get, other managers could benefit from that information especially when a contractor is new to the BHA.

16.6 Scheduling and Performing Inspections and Treatments

Scheduling pest control will depend on the magnitude of the development's problem. All developments shall have an IPM contract. This contract starts with a yearly thorough inspection of all apartments, common areas, basements and utility rooms within the property. Residents should be encouraged to prepare their apartment for this inspection. Removal of all items in the closets, cabinets and drawers is imperative so the pesticide contractor can get a true reading of the infestation levels in the apartment and can see if exclusion is needed behind removed belongings. The preparation tends to compel the resident to clean out unwanted items rather than put them back after the inspection is completed. Residents must receive a flyer from the management office at least 48 hours in advance of the pest control contractor's visit. Entry into all apartments is mandatory. If every unit is not inspected and treated if necessary, the program will not be effective. If the resident received proper notice and they are not home, use the office key to enter. If the pesticide contractor is required to return to the apartment with an additional charge to the BHA, you should consider charging the resident for the amount of the additional charge.

It is a good idea to make sure that there are no holes or raceways for pests to travel at the same time as any inspection or treatment. The closing of small holes is the responsibility of the contractor and is included in the IPM spec. Any holes too large for the contractor to correct with approved materials such as expandable foam, copper wool, spackle or joint compound and leaks found during the inspection, should be reported to the manager. Work orders generated because of these reports should be considered urgent and corrected as soon as possible. At every vacancy turnover, caulking and sealing of all possible pest entry points into apartments is required (Refer to Chapter 20). It is also required to inspect for holes and raceways whenever a resident has a recurring problem unrelated to housekeeping. Regular progress meetings with the pesticide contractor/technicians should include reports of poor housekeeping. Also, at any inspection and any time the contractor enters a unit for treatment or monitoring, the IPM spec requires them to vacuum the apartment with a hepa filter capturing all dead and live pests, their debris, food, other particulate matter and dust seen at the time of the visit. Continual vacuuming by the resident is needed to clean up any dead carcasses or eggs left behind.

After the initial inspection/treatments are complete, a list of units and non-unit areas in buildings or on the site should be developed that require follow up inspections, monitoring of pest activity, and subsequent

treatments. This list called the focus list (non-unit areas are called the focus B&G list, see B.H.A. specification) should include but not limited to all apartments or areas with visible pest activity and housekeeping issues. Residents who were not initially on the focus list but have visible pest activity throughout the year should be encouraged to put in a work order and should be added to the focus list for contractor follow up. Any pest activity noticed by BHA staff throughout the length of the contract should be reported to the maintenance super or manager for contractor follow up, too.

It is recommended that the pest contractor and the manager or their designee (contract administrator) regularly communicate with one another around the focus list. It is a best practice to meet with the pest contractor's technician each time they are on site even if only for a few minutes. The contract administrator should always know what apartments and areas in the development have active infestations or conditions conducive to pest health. These conversations should address such things as follow up treatments, maintenance issues contributing to the problem and lease enforcement.

An IPM Housekeeping Log can be found in the S:drive, SOP folder, SOP appendices, Chapter 16 – Pests and Mold, Pest Control Specs. This can be used to track focus units and the focus B&G list. There is a column for housekeeping issues, health issues such as asthma (roach and rodent feces and parts are known to trigger asthma attacks), access to the apartment issues, and any corrective action taken. Dates of inspection, monitoring, treatments and educational visits can be noted on the housekeeping log as well.

16.7 Service Reports

Anytime there is an IPM service on BHA property, the contractor or the in-house BHA pesticide applicator must document all problems encountered including: the office key didn't work, the resident refused entry, there was a dog unattended in the apartment so they couldn't enter, severe housekeeping problems, maintenance issues and levels of infestation. Additionally, were pesticides applied and if so, what pesticides, how much and where they were applied. All contractors and in-house staff must complete the "BHA Pest Control Service Record" for every treatment. See S:drive, SOP Folder – SOP Appendices for a copy of this form. All reports, records and housekeeping citations must be maintained in the annual Service Records Binder or IPM/Bed bug log books. Most contractors have their own service record reports. They are not required to fill out an additional BHA service record report but must supply the BHA with a copy of their companies' report. All documentation must comply with the Massachusetts Pesticide Bureau regulations, CMR333 13.00 (1, 3, 4 and 5) as well.

16.8 Feral Cats

Those developments that have a feral cat problem need to work closely with the Animal Rescue League or the M.S.P.C.A. They may provide you with "Have-a-Heart Traps" to capture feral cats or you can purchase them. The traps must be monitored, at a minimum, on a daily basis and should never be left in basements over a weekend (that would be considered cruelty to the animals). After capture, the agencies will come and pick the cats up or you can drop them off. It may be necessary to provide food/water until you are able to drop off the cat and trap if it is borrowed. Residents should not be allowed to feed the feral cats. Feeding feral cats or birds can contribute to a rodent problem so enforcing the "no feeding rule" is very important. Make sure all basement doors and windows are secure to eliminate an entrance for the cats. Individuals caught breaking basement doors and/or windows should be dealt with according to the BHA lease. Keeping the feral cat problem to a minimum controls the flea problem in the basements, as well.

16.9 Bedbug Controls

Bedbugs are experiencing a resurgence across the country and therefore complaints about bedbugs are increasing in all types of housing. Procedures to aggressively treat and control bedbug infestation have been developed and must be followed at all times.

When a resident makes a complaint that they have bedbugs or that something is biting them but they can't identify the source, a licensed exterminator (contractor or B.H.A. licensed pesticide applicator who can demonstrate bedbug experience) must inspect the apartment to verify the existence of bedbugs. In developments that have weekly service, the inspection must be scheduled for the next service date. In developments that have bi-weekly or monthly service, the bed bug inspection must be scheduled within a week of the complaint. Residents are asked to strip their beds and pick up the floor around the bed but they should not move things around until after the inspection takes place. Bed bugs will scatter to places they normally wouldn't be found if disrupted by the resident while moving things around or throwing items out. When and if bed bugs are found, the pest control contractor will give detailed instruction for preparation for the treatment. When bedbugs are identified the following steps (complete procedure is in the S:drive, SOP appendices, Chapter 16 – Pests and Mold, Bedbugs folder) must be adhered to:

- 1) Perform an inspection of all apartments that abut the apartment where bedbugs have been identified. This should include the apartment above, the apartment below and all apartments beside where the original complaint was lodged. Monitoring traps should be placed in all sleeping areas in all apartments that abut the complaining apartment as well as that apartment. You must interview the resident(s) to find out where everyone in the household sleeps, could be on the couch or a lounge chair. If bedbugs are found in any of the apartments adjacent to the original apartment, all steps must be followed for each apartment where bedbugs were identified.
- 2) Send a notice to the residents that a treatment is needed and include the "Preparation Required Prior to a Bedbug Insecticide Application" which can be found in the S:drive, SOP appendices, Chapter 16 – Pests and Mold, Bedbugs folder. Most pest control contractors have their own preparation requirements. The requirements developed by B.H.A. should be considered the least required before the treatment. The contractor can request additional preparation depending on the conditions of the apartment. We are required to give a 48 hour notice to all residents but a 72 hour notice or greater if possible is suggested because of the extent of preparation required to treat for bedbugs. Preparation usually requires an extensive laundry component. Dissolvable laundry bags can be requisitioned from Central Stores and provided to the resident. Residents need to be educated that they have to bring a clean/bed bug free container to transport the freshly cleaned clothing. Otherwise, they will use the same container (bag or basket) that they transported the clothes in initially which potentially could re-infest the clothing and then the home. Dissolvable laundry bags will contain the clothing right into the washing machine, also avoiding the infestation of the Laundromat especially if it's on site so other residents don't bring them home.
- 3) A treatment for each apartment where bedbugs were identified takes place on the date of the notice. It is recommended that a treatment not happen if the resident is not prepared. It will be wasteful to do so. If the resident does not do their part, this procedure will not work. Bedbugs are very elusive and have long dormancy periods (it has been reported that they can live up to a year without a blood meal but research has proven that they live at room temperature for between 3 – 5 months). After the treatment, place monitoring traps in all sleeping areas (again, get this information from the resident).
- 4) After two weeks, the exterminator should return to inspect and document the activity in the original complaining apartment and all units that abut that apartment. Additional treatment(s) will be determined through regular inspections done every two weeks until which time it is determined that the problem no longer exists.

It is not necessary to pay a contractor to monitor the apartments. If you have a licensed applicator on staff, they are capable of inspecting and monitoring the activity of bedbugs on your site. Most superintendents with experience can inspect and monitor the activity, too. Bedbug treatment and control is very expensive so if you can cut some of the cost by monitoring the apartments utilizing B.H.A. staff, it is highly suggested that you do so. Monitoring pit fall traps or active monitors for bed bugs should be supplied and placed in the apartments by the pest control contractor but managers can also purchase them through Central Stores.

Furniture and other personal belongings should not be thrown away unless an approved contractor has made that determination. Moving infested belongings out of the apartment and out to the dumpster could potentially infest the entire building. If furniture must be disposed of, the manager will provide the contractor with furniture bags or plastic sheeting/duct tape to bag up and ensure there are no bed bug escape routes.

Then the B.H.A. staff will remove the furniture. This is described fully in the specification. There are mattress/box spring covers available from Central Stores that can encapsulate a mattress and box spring separately after treatment which avoids replacement. The box spring is the most important component of the bed to encapsulate because it affords the bed bugs the most harborage. The rule of thumb should be that the licensed exterminator/contractor should make the determination what if anything should be removed from the apartment. All items that need to be disposed of should be disposed of by the contractor in a way that other residents cannot reclaim and infest their apartment, i.e. cut the mattress beyond repair or spray paint with large letters, "BEDBUG INFESTED" or something equally daunting before it is bagged up by the contractor and the BHA disposes of it.

16.10 Resident Education

Integrated Pest Management includes a large resident education component. It is important that residents receive guidance, as needed, about pest control. Most manufacturers of pesticides have free literature that can be acquired to give to residents. It gives instructions for preparation prior to inspections and pest control, what to do after the pesticide has been applied, and tips on housekeeping and food storage. The IPM specification calls for a regular community meeting between the pest contractor and the residents. This is a time when questions can be asked and answered, discuss schedules and preparation instructions. Citations must be issued by management if housekeeping is a problem. Use the Clutter Rating Scale to determine if there is need for intervention. Follow up inspections are necessary to ensure the resident is keeping their apartment clean and clutter-free. To keep pests to a minimum it must be a team effort between the residents, the maintenance department, management and the pest control contractor.

The BHA has created various information sheets (see S:drive, SOP folder, SOP Appendices, Chapter 16 – Pests and Mold) for use by management when housing new residents and working with existing residents with pest problems many in several languages. The Boston Public Health Commission has made available to the BHA a brochure in a variety of languages that can be given to residents at the time of their orientation or when pest problems are found in apartments – "Healthy Homes; What you need to know about pests and pesticides to protect your family's health." They, also, have provided us with bed bug information sheets which were translated into Spanish, Chinese and Russian. There is an exorbitant amount of information from institutions of higher learning, also, translated in other languages. Many of these sheets can, also, be found in the SOP appendices, Chapter 16 – Pests and Mold. A really good reference for IPM is the website www.stoppests.org

16.11 Pest Control Record-Keeping

License Holder's Responsibility:

In-house employees who perform pest control services on BHA property must maintain records of **all** pesticide usage by filling out the **BHA Pest Control Service Record form**. See S:drive, SOP, SOP Appendices, Chapter 16 – Pests and Mold, Pesticide Use Forms for a copy of this form. The information recorded on these forms and proof of insurance from the Risk Management Department will be submitted to the State annually as part of the Pesticide Usage Reporting process. This is the responsibility of the licensed pesticide applicator. See S:drive, SOP, SOP Appendices, Chapter 16 – Pests and Mold for additional information on Pesticide Use Reporting to the State. In-house employees who perform pest control services on BHA property are required to keep a copy of each completed BHA Pest Control Service Record form for his/her own personal records and the reporting requirements. The report must include all pesticides used. Remember that products available to the general public must still be reported by the BHA licensed pesticide applicator such as Round Up for weed control. A copy must also be filed with the corresponding pest control work-order and submitted to the Maintenance Superintendent to file. Pesticide Contractors are responsible for reporting their own usage and is not the responsibility or concern of the BHA. A copy of all service records for pesticide contractors' and in-house employees' work at the BHA must be provided to the manager at the time of service and kept in an IPM/Bed bug log book.

Manager/Maintenance Superintendent's Responsibility:

The Property Manager or Maintenance Superintendent must insure that all pest control work orders have a Pest Control Service Record document attached. The Property Manager, Maintenance Superintendent or their designee must maintain copies of all pest control work orders and pest control service records in their Service Record Binder or IPM/Bed bug log books.

Program Maintenance Supervisor's Responsibility:

The PMS should on a yearly basis, gather the pesticide usage reports for Mosquito or weed control from their pesticide applicators and forward to the Maintenance Systems Manager at the Building Services Office. He/she will copy them to the SOP Appendices for future reference and, in case, the pesticide applicator(s) misplaced any of their copies of the documentation needed for the state usage reporting process.

Outside Contractor's Responsibility:

Outside Pest Control Contractors can use the B.H.A. Pest Control Service Form or may use an equivalent form developed by the Contractor. If the contractor chooses to use their own form, the BHA manager should review it and approve its content prior to the start of the contract.

All record of inspections/treatments shall be maintained in the Preventive Maintenance Annual Service Record Binder or IPM/Bed bug log books.

16.12 Mold and Mildew

Mold and Mildew generally grow where there is a combination of moisture and lack of ventilation. Staff needs to identify the area and investigate the source of moisture. If the resident references health issues, inform Management of this condition.

- Roof and drain areas need to be investigated.
- Building envelope, window and flashing need to be examined.
- Plumbing and steam leaks need to be addressed.
- Housekeeping issues need to be addressed, dryer exhausts and humidifiers.

Once the introduction of moisture has been repaired, staff should focus on cleaning the area thoroughly. Use of all necessary protection should be used during this work. Review the Material Safety Data Sheets [MSDS] for all chemicals and cleaners before starting work. Residents should vacate the work area and it should be adequately ventilated. Stain-kill and repaint areas after the areas have been properly cleaned and dried out.

Mold and mildew can grow in an apartment when there is excess moisture. Correcting a mold/mildew problem is a multi- step process:

16.12.1 Determine the source of the moisture

The water may be a BHA (as landlord) problem if it is caused by:

- Roof leak
- Exterior wall leaks
- Leaks around windows
- Plumbing leak, including hot & cold water supply or drains
- Steam leak

The water may be a resident problem if it is caused by:

- Excessive steam-type cooking
- Use of humidifiers

- Excessive showers
 - Improperly vented dryers
 - Lack of turning on heat
 - Or a combination of the above without opening windows or using fans
- Or, water could be coming from a combination of these sources.

16.12.2 Repair the leak(s)

If it is a BHA responsibility, fix the source of the leak immediately or as quickly as possible. BHA Maintenance Services Division crew members are available to assist with roof leaks or leaks in exterior walls or around windows. Development crews should fix all plumbing and steam leaks.

16.12.3 Dry out the apartment

Give the apartment some time to dry out – use fans and/or de-humidifiers if practical.

16.12.4 Provide resident education

If it is a resident-caused problem (or the resident is contributing in some way) provide the resident with the resident flyer, and show them – by on-site demonstration as much as possible - the types of things they can do to prevent the water build up. Use the information sheet (see S:drive, SOP appendices, Chapter 16 – Pests and Mold).

16.12.5 Repair the damage

Regardless if the initial cause was a BHA or a Resident responsibility, BHA must repair the damage unless the mold/mildew is limited to the tile areas of the bathroom, in which case the resident is responsible for cleaning it.

In most cases, the mold is limited to painted surfaces. To correct the problem:

Wash thoroughly with a detergent containing TSP. TSP has almost no odor and can be very effective or you can use another type of cleaner approved for mold remediation. Use rags or sponges; dispose of them after use so as not to spread mold spores.

You may want to ask the resident to leave the apartment during remediation so that the odors from the materials you will use will not bother them. Also be sure to ventilate the area well while you are working to reduce the length of time that odors remain. However, you do not want to create too much of a cross ventilation because the wind created can spread mold spores from one place to another inside the apartment

After washing down the mold thoroughly, allow to thoroughly dry. Then paint the area with stain kill (alcohol based). Allow to dry thoroughly, and put on a final coat of paint. It may be necessary to paint a whole wall or ceiling even if you are only patching a small area.

If the mold or mildew has gone deeper than the surface of the wall or ceiling, i.e. penetrated through the plaster or wall board, you may need to remove a section of plaster or wall board completely. In this case, be sure to cut around the entire section affected by mold and dry out the wall behind the area completely. Then replace the plastering or wallboard, and finish as usual with primer and paint.

16.12.6 Protection for workers

While cleaning mold, the workers should wear skin, eye and respiratory protection. Gloves should be worn. Regular household rubber gloves are appropriate. Goggles should be worn which are designed to prevent the entry of dust and small particles. Do not use plain safety glasses or goggles with vent holes.

In addition, respirators should be worn. Most painters have already been fitted for respirators. For Laborers, you should obtain at least N-95 respirator or HEPA filter cartridge type respirator. These are available through central stores.

16.12.7 General Comments

Only when you really can't solve the leak – for instance the crew has patched several times and it will not hold – should you decide to move the resident and re-code the unit as uninhabitable until a capital project can fix it.

If the sole source of water is related to resident issues as described above, and you educate the resident and repair the damage, and it recurs, be sure to maintain good documentation of all the corrective actions you have taken. A mold and mildew worksheet can be found in the appendices that can assist you with the documentation. You may need to charge the resident if there are repeated cases of mold growth and there are no BHA-responsibility water leaks in the apartment.

16.13 Appendices to this Chapter

Appendices to this Chapter can be obtained on the S:drive, **SOP** folder in the folder labeled **SOP Appendices**, in the sub-folder labeled **Chapter 16 – Pests & Mold**. Appendices include Pesticide Licensing information. BHA Pest Control Records form; B.H.A. IPM Spec, Quotation Sheet, Housekeeping log, Mold & Mildew worksheets; Mold & Mildew Maintenance, Means & Methods Guidelines; Holiday Tip Sheets; Move-in instructions forms and other Pest Management information etc. **Note:** appendices are subject to addition and change at any time.

PART THREE: MANAGEMENT OF REPAIRS & WORK ORDERS

Chapter 17 Introduction to Repairs and Work orders

17.1 The Work Order System

The work order system is a computerized system which tracks most maintenance work performed by the BHA. This includes all work completed by tradespersons, and some of the work completed by contractors, laborers, groundskeepers, resident custodians, managers, superintendents, and others. Currently, the work order system is managed through the BHA's main frame computer system. The Work Order Center Director is responsible for managing the system and making sure that information such as employee numbers and other codes are maintained up to date.

Work orders may be entered during a resident call-in or may be entered from inspection forms and other sources. The system contains information on all residents, apartments and developments and the computer automatically generates much of the information.

A series of codes are used to track work orders by priority, who requested the work order, and services requested and performed.

Work orders print out at each site as well as at the Work Order center (for some programs). A number of reports may also be generated to print at sites to assist maintenance supervisors in organizing and assigning tasks based on the work orders. A work order will only contain work for one geographical location (usually an apartment) but may include several tasks for that location.

Once the work is completed, completion information is recorded on the work order, which is then data entered into the computer system to complete the information.

17.2 Standards and Expectations

All work completed by tradespersons, and some work completed by supervisory staff, laborers, janitor groundskeepers, resident custodians, and others is recorded on the work order system, which is described in more detail in the rest of this section.

It is important that:

- o All information on work orders be complete, specific and accurate
- o All work orders include the time of day the work order was received (i.e. when the BHA was notified of the problem) and the time of day the work order was completed, as well as the date.
- o Incomplete work orders be maintained in files by unit or by work order number, and not in files organized by trade.
- o The level of incomplete work orders (i.e. outstanding work orders) is minimized at all times.
- o Supervisors manage the completion of work orders using efficient methods, taking into account the need for emergency response which interrupts work

All staff who work with work orders – data entry staff, supervisors, and maintenance staff – are held accountable for the accurate and timely maintenance of the work order system.

17.3 Roles and Responsibilities

17.3.1 Creating Work Orders

Managers, Superintendents, and Senior Management Aides all create work orders on the BHA's central computer system. Work order center staff also create work orders. Most resident requested work orders are created by the work order center staff; work orders based on inspections may be created by site staff or the work order center. If site staff wish to have the work order center create inspection based work orders, they must coordinate with the Director of the Work order center.

17.3.2 Assigning work orders

Work should be assigned every morning to be completed and returned before lunch. After lunch, the afternoon work will be assigned. All work orders assigned whether they are assigned in the morning or afternoon should be returned to the superintendent regardless of completion at the lunch break and then again at the end of day. All work orders assigned by the superintendent should be recorded in the work order log which will decrease loss of paperwork. It is impossible to control the paperwork if you don't know what you have assigned.

17.3.3 Completion of work orders

Maintenance Superintendents are responsible for the day to day scheduling of work loads to insure that work orders are completed in priority order and within the time frames outlined in later chapters.

Trades staff and other staff completing the work are responsible for insuring that all information is written on the completed work order or ticket accurately and completely (employee id, work order service codes, end times, dates, stock excluding fasteners and heating/plumbing fittings 1" and under, etc). Superintendents are responsible for checking completeness of information provided. **All work orders must be either initialed or signed by the superintendent or manager after review. An initial indicates the work order documentation was reviewed by the super or manager and that to the best of his/her knowledge that everything is documented and accurate. A signature of the superintendent or manager would indicate that the work was inspected by them. If follow up is needed, the work order should be reassigned to the employee who did not complete the job or did it below standard.** When a resident is not home and there is no permission to enter, a "Sorry We Missed You" form should be filled out and a copy put under the tenant's apartment door or affixed to the door so the resident knows we are attempting to complete work in their apartment and they will call to schedule a return visit. If at all possible, 48 hour notices would decrease the occurrences of missing the tenant. Whether the tenant is home or not when the work is completed, a copy of the work order should be left with the tenant or somewhere in the apartment in a place the tenant will easily see it. **If the resident is home when the work is completed, the employee should ask them to sign the work order. This is required on all work orders including perform inspection work orders (LUIs, QCs, pre-REAC, etc.).**

17.3.4 Data Entry – completed Work Orders

Site supervisory and clerical staff, as well as Work order Center Staff, are responsible for the data entry of completed work order information. If a site gets behind, the Manager may request assistance from the work order center.

17.4 Tracking and Reporting

Superintendents are responsible for tracking all outstanding work orders at all times. Superintendents need to know how many work orders of each type exist and develop methods to assign them out for completion. Once completed, it is important that the completion information be entered into the computer system as quickly as possible.

On a weekly basis, a number of reports are generated from the Central Operations staff and sent to all site and program supervisory staff. This includes information on outstanding work orders, work orders completed in the previous period, and work orders requested. These are produced and sent out on Ms. Excel spreadsheets and managers and supers may manipulate the information produced to assist in determining work scheduling.

It is important that work order back logs be maintained at the lowest possible level at all times and that managers and supervisors watch for “creep” - the tendency of outstanding work order levels to creep up over time, often reaching a level where the back log of work seems unmanageable. Special attention should be paid to aged work orders and the oldest completed first. Work order priorities are discussed in the next chapter.

17.5 Appendices to this Chapter

Appendices to this Chapter can be obtained on the Fam/Eld S:Drive in the folder labeled **SOP Appendices**, in the sub-folder labeled **Chapter 17 – Intro. to WOs**. Appendices include Work Order Manual, Work Order Procedures etc. **Note:** appendices are subject to addition and change at any time.

Chapter 18 Work order priorities and standards for turnaround times

One of the most important aspects of managing a development's maintenance program is to prioritize the work tasks. Maintenance work at the BHA is prioritized in accordance with the system below.

18.1 Emergencies (E) or Exigent (X)

Emergency work orders are those we discover through a resident call-in, LUI, Building & Grounds inspections [short form and long form] or other process which are conditions that are immediately threatening to the life or safety of the residents, staff or site. Exigent work orders are also emergencies, but are those picked up as part of a HUD REAC inspection. While most emergencies will be coded as E work orders, those picked up by the REAC inspector are coded as X. Both codes apply to the definitions and rules of this section.

Whenever an emergency occurs, the Property Manager and maintenance staff must evaluate the problem and take corrective action within 24 hours. In an emergency, BHA staff are required to gain access to the apartment under the emergency access provision of the BHA lease. The list of emergency work items is as follows:

Flooding from any source

Fire

Back up – actual back up of sewer and/or storm drain water into an apartment or basement

No Electricity (half electricity is only dealt with as an emergency during normal working hours, Friday nights or during the day on Saturday, Sundays or Holidays)

Non-working smoke detector (can be abated by installing a battery operated smoke detector until an electrician can get to the site)

Door won't lock or resident is locked into the apartment

Toilet stoppage (in the case of only one toilet in the apartment)

Total failure of refrigerator

No hallway lights

Total failure of all four stove burners (oven excluded; oven is not an emergency)

No Hot Water

No Heat in the entire apartment (Sept 15 – June 15 only)

Gas leak / no gas

No water

Active steam leak in the apartment or public common area only, or in an area where it threatens a piece of equipment.

Lack of apartment security (i.e. broken window which can be entered)

Any other condition which presents an immediate threat to health or safety (may be caused by natural disaster)

Any condition deemed to be a safety hazard

Open panel boxes or exposed wires of any kind

Lack of emergency egress from buildings or apartments

Release of any oil or other hazardous material at the site; report to Building Services immediately.

Standard:

Emergencies must be repaired or abated within 24 hours. As a general rule, the expectation is that the emergency will be dealt with in far less than 24 hours. When necessary, the emergency can be abated using

lesser means (such as replacing an electric smoke detector with a battery operated smoke detector or securing a broken window with plywood) until such time as the permanent repair can be made.

The following items are not considered emergencies, and are to be categorized as routine in the work order system, but must be given special attention. They do not need to be completed during off-work hours and can wait until the start of the next working day:

Sink or tub stoppage
Half Electricity

18.2 Routine (R) and Defect, Other (D)

Routine work orders are the work orders, which are called in by residents or staff on a day to day basis and are not emergencies. Defect, Other work orders are those work orders, which meet the definition of routine but are identified as part of a HUD REAC inspection. These work orders should be completed pretty much in the order that they come in, and should be completed within twenty-five days. Superintendents and managers need to be alert to those routine work orders, which require special attention as noted in the Emergency section above. Examples of routine work orders are:

Repair interior door knob
Replace single floor tiles
Grout tubs and sinks
Repair one stove burner
Minor refrigerator repairs

Standard:

Routine work orders shall be completed within 25 calendar days.

18.3 Non-Life Threatening Health and Safety (N)

Non-life Threatening Health and Safety work orders are those identified through a HUD REAC inspection as Health and Safety related, but non-life threatening. These are identified on HUD REAC reports in the middle column, through the use of "(NLT)" after the item description. These items should be completed as quickly as possible, and are considered more urgent than Routine or Defect, Other work orders.

18.4 Living Unit Inspection - LUI (L)

Work orders resulting from Living Unit Inspections are categorized as LUI work orders unless they are an emergency. LUI work orders may be routine but are still categorized as LUI. If the Property Manager finds an emergency condition during a unit inspection, this work order must be categorized as emergency, a work order written and the work completed within 24 hours.

Standard:

All non-emergency LUI work orders shall be completed within twenty (20) days of the inspection.

18.5 Building and Grounds (B)

Work orders resulting from Building and Grounds Inspections [weekly short forms and formal quarterly long forms] are categorized as B&G work orders unless they are an emergency. Any emergency conditions found

in a routine building and grounds inspection must be categorized as emergency, a work order written, and the work order completed within 24 hours.

Standard:

Building and Grounds work orders shall be completed within twenty (20) days.

18.6 Vacancies (V)

Work orders resulting from vacancy inspections are categorized as vacancy work orders. Because it is important to keep vacancy turnaround times as short as possible, it is very important to perform vacancy inspections within 48 hours of the move out and to create work orders for all necessary work immediately after completing the inspection. More information on vacancy turnaround work orders is contained in Chapter 20.

Standard:

Vacancy inspections must be completed and work orders written within 48 hours of the vacancy. Vacancy work orders shall be completed within 30 days.

18.7 Preventive Maintenance (P)

Preventive maintenance is that maintenance which is scheduled on a regular basis to inspect, clean and service equipment. A fuller description of preventive maintenance is found in Part 4, Chapters 23-37 of this manual.

Work completed by development and Building Services staff must be completed on work orders. These work orders should be input no more than a few days before the work is expected to be completed and in accordance with the schedule for each development.

18.8 HID - Housing Inspection (H)

Whenever a Property Manager receives a complaint from the Housing Inspection Department ordering that certain repairs be made, work orders must be written for each item on the complaint and categorized as H (HID). If the work is an emergency, it must be completed within 24 hours.

Standard: all non-emergency HID work orders must be completed within 5 days. In addition, the procedures noted in Chapter 19 for tracking and monitoring HID work must be followed.

18.9 Reasonable Accommodation (T)

Reasonable Accommodation (RA) work orders are work orders which are requested by residents or staff in order to provide a resident with a disability equal access to BHA housing. A disability is defined as a "physical or mental impairment that substantially limits one or more major life activities." BHA is required to provide reasonable accommodations to individuals with disabilities pursuant to state and federal law. Most RA work order requests will be for unit modifications or for the installation of devices to help a resident with a disability make use of his or her unit.¹

¹ For more information on RAs, please consult the Boston Housing Authority Reasonable Accommodation Policy.

Requests that are obviously or likely related to medical needs (such as for the installation of grab bars) shall be categorized as T (Reasonable Accommodation Request) even if the resident does not disclose having a disability. It is better to categorize a work order as being a T and be wrong than to not code it as a T and be wrong. Staff shall not ask residents if they have a disability or for details on medical conditions; it is up to residents to provide that information if they want to.

If work order center staff (or other staff performing work order entry) are unsure of whether an RA has been requested, have received a request that appears to be an RA but is not commonly processed by the work order center, or receive an RA request that needs follow-up/clarification from management, they must use priority code T, but then use task code 4152 (Potential RA Request). This code will prompt management to contact the resident for additional information. When entering a 4152 work order, staff should include detailed notes on what the resident has said to indicate that it might be an RA request which will help management respond properly.

These work orders should be completed in the order in which they are requested and shall be considered more urgent than routine (R), LUI (L), vacancy (V), or other non-emergency or non-HID work order. They shall be completed within twenty days. Superintendents and managers need to be alert to these work orders due to BHA's obligation under disability law to complete them in a timely manner. Assistant Directors of Property Management and Regional Managers need to review outstanding work orders on a weekly basis to ensure timely responses on RA work orders.

The following are examples of potential reasonable accommodation requests due to a person's disability:

Grab bar and handheld shower installation (for those with disabilities that impact bathing)
Cabinet lowering (for those with disabilities that make higher cabinets difficult and/or dangerous to use)
Installation of additional lighting (for those with visual impairments)
Installation of doorbell flashers (for those with hearing impairments)
Installation of automatic doors (for those with disabilities that make opening doors difficult)
Repair of work orders

Standard:

Reasonable Accommodation work orders shall be completed within 20 calendar days.

Note: As with other types of work orders, additional time may be required depending on the nature and scope of the requested work. In cases where the work requested will exceed 20 days, managers will need to consult with their ADPM, Regional Manager, and/or PMS to be certain that the proposed plan to address the requested accommodation is appropriate. And, as with all reasonable accommodation requests, the Manager should consult with their ADPM or Regional Manager before denying the request.

18.10 Refer to Capital (C)

These are work orders which are identified as part of a HUD REAC inspection but which the site is unable to complete without capital funding. The decision to code these work orders as C is made by the site staff in consultation with the Assistant Director of Property Management and other senior Operations Staff.

18.11 Scheduled (S)

These work orders are those for scheduled Perform LUI, Perform Building and Grounds Inspection work orders, and Pest Control work orders. These work orders are generally produced by Work Order Center staff in accordance with a schedule agreed to with the site.

18.12 Order of work

In general, work should be assigned in the following order:

1. Emergency, Exigent, and Emergency HID's (24 hour turnaround standard)
2. HID (five-30 day turnaround standard depending on the citation)
3. Reasonable Accommodation (20 day turnaround standard)
4. Vacancy (30 day turnaround standard)
5. Preventive Maintenance (as per preventive maintenance schedule)
6. Non-Life Threatening REAC work orders (20 day turnaround standard)
7. LUI and Building and Grounds Inspection (20 day turnaround standard)
8. Routine and Defect-Other, by oldest work order first (25 day turnaround standard)

In addition, the standard for Extermination Call Back work orders is 14 days.

There are other considerations when determining the schedule of work – such as concentrating work in one address or building at a time to save travel time, or giving a mechanic all open work orders for that apartment, address or building at the same time. All licensed work must be completed by the appropriately licensed mechanic, however. These considerations are described in more detail in Chapter 19.

18.13 Appendices to this Chapter

Appendices to this Chapter can be obtained on the Fam/Eld S:Drive in the folder labeled **SOP Appendices**, in the sub-folder labeled **Chapter 18 – WO Priorities**. **Note:** appendices are subject to addition and change at any time.

Chapter 19 Managing/Scheduling Work orders and Use of Licensed vs. Non-Licensed Tasks

One of the most important roles that a superintendent plays is the assignment of work for the staff. Chapter 18 outlines the general priorities under which a super organizes and assigns work to be completed. This chapter establishes standard operating procedures for organizing and maintaining work orders, the use of work order reports for this purpose, and provides general guidance for superintendents to use when determining what work gets done and when.

It is important that when the Superintendent is not in, another staff person is able to cover these functions. This may be a Super 2 in larger sites, or it may be a manager or a crew leader in a smaller site. These processes need to be followed all the time consistently to insure that paperwork is not lost and that work continues to be completed as efficiently as possible.

19.1 The Work Order System – A Summary

All work completed by tradesmen and some work completed by J.G.s, laborers and resident custodians must be completed on work orders. The BHA uses a centralized data system to maintain work order information. Refer to the work order manual, for detailed information on creating and completing the work order itself.

Work orders may be created from a number of sources:

- Residents may call in a complaint
- Living Unit Inspections
- Building and Grounds Inspections [Weekly short-forms and Quarterly long-forms]
- HUD REAC inspections
- HID complaints
- Vacancy Inspections
- Other management reports (i.e. informal walkthroughs)
- Other sources – such as a friend, relative, or an advocate of a resident
- Scheduled work from the preventive maintenance plan
- Other staff such as the Heating Plant staff

Work orders are written into the database by assigned site staff (management and maintenance staff members) or by the Work Order Center staff as they arise through call-ins or from inspections or other sources. The CCS system will automatically assign a work order number. Work order numbers are assigned sequentially on a citywide basis.

On a periodic basis during the workday, the maintenance superintendent will print out all new work orders. In addition, a number of reports can be generated on the site (described in detail later in this section) to assist the maintenance superintendent in assigning work.

Work orders print out on a three part NCR form and include information on the location of the work, the work required, date issued, priority (see chapter 3) and other information. When work is completed, one copy is left with the resident (or discarded if a vacant unit or filed in the annual Preventive Maintenance Service Record Binder if a preventive maintenance work order), one copy is filed in the unit file. Prior to filing work orders, all information from the completed section is recorded on the CCS database.

19.2 Use of Work Order Tickets

A work order ticket is a hand written version of a work order. As a general rule, all work is completed using the computer printed work order. However, there are some instances when tickets must be written out:

In an emergency – rather than wait for work orders to print, or do a special work order run just to get an emergency work order printed, a ticket must be filled out. The ticket should include the work order number from the computer as well as all other pertinent information. When the work order prints later in the day or the next day, attach the completed ticket to the work order to be filed.

When the computer and/or printer are off-line: If the computer is off line, the person taking the requests should put all of the information from the caller directly onto a ticket form. There will be no work order number assigned as this is done automatically by the computer. A work order should be entered into the system as soon as possible after it comes back up. In this case, if the work was not completed on the ticket the ticket may be discarded, as a work order will print out. If the work was already completed, the ticket should be attached to the work order and filed.

Note: in the event that you cannot input the work order until the next day or later, you will be unable to back date the work order to the day it was called in. In this case, you will need to contact the Work Order Center Supervisor so that they can do it using a supervisory override.

If the printer only is out of commission, the work order ticket should also include the work order number as assigned by the computer.

Finally, use tickets to replace lost work orders. **Do not, under any circumstances, reprint work orders, which have been lost.** This can create problems with the database. Use a work order ticket instead. File the ticket as if it was a work order.

19.3 Maintenance of Outstanding Work Orders

As work orders are printed, they are filed into the work order file by work order number, or by unit number. This allows the maintenance superintendent to easily pull from the file each work order as the work is assigned out. These files are generally locked and not accessible to anyone other than authorized personnel. The only exception to this is for a work order, which is to be completed immediately (i.e. an emergency) or a work order which was completed prior to the printing of the work order on a ticket. In this case, the completed section of the work order is to be filled out and then site staff or, if sent to the Work Order Center, the data entry clerks can input.

Bins or trays for tradesmen are only to be used for daily assignment of work.

19.4 Determining Daily Work

The superintendent is responsible for planning the work of each day. Superintendents may do this the day before or first thing in the morning before staff comes in to work (if they choose to come in early for this purpose). Superintendents become very adept at this, and the outline below is only a guideline for superintendents to follow. Generally, superintendents will know at the start of each week a general outline of work to do that week – including vacancies, preventive maintenance tasks, and other planned work. Much work however, is planned day by day. To do this, the superintendent will need to reference the outstanding work order report and depend on the super's familiarity with what order the work shall be completed.

The report, needed to determine the next day's work for each worker, is the "Outstanding Work Orders – Download Only". There are other reports, listed below, that can be created but have print only functions.

The download report is more flexible since it is an Excel spreadsheet downloaded into your I:Drive in a folder named "Work Order Report" and can be filtered and/or sorted any way that the superintendent or manager require

1. Outstanding work orders by date
2. Outstanding work orders by unit
3. Outstanding work orders by trade
4. Outstanding work orders by priority

All of the reports also include priority codes so that a superintendent can easily pick out work for vacant units. In addition, Permission to Enter information is included on these reports.

Superintendents may find other reports – such as the daily log report – useful as well. Superintendents should be using the report listed above, but may add any other reports they find useful to their organizational system.

In assigning work out, the superintendent needs to take into consideration a wide variety of factors:

First, consider the priority (as discussed in chapter 18):

1. Emergency and Exigent (24 hour turnaround standard)
2. HID (five day turnaround standard)
3. Vacancy (fifteen day turnaround standard)
4. Preventive Maintenance (as per preventive maintenance schedule)
5. Non-Life Threatening REAC work orders (20 day turnaround standard)
6. LUI and Building and Grounds Inspection (20 day turnaround standard)
7. Routine and Defect, Other, by oldest work order first (25 day turnaround standard)
8. Extermination (14 day turnaround standard)

Next, consider age of the work order. The oldest work orders need to be completed first.

Next consider the location of the work order. If the trade's person has to travel around the development extensively, it will seriously impact the amount of work that will get accomplished. So you want to focus work in adjacent units and addresses.

Consider non-licensed/neutral tasks [Section 19.12]. Don't forget that all trades can do all of the non-licensed work and anything on the neutral tasks list. If you are assigning the plumber to repair a toilet and there are two small, non-licensed/neutral tasks to be done in the same unit, it probably makes sense to assign that work as well (depending on your outstanding work load of licensed plumbing tasks)

Finally, consider the numbers. It may make sense for you to try to get a lot of little jobs done to reduce your outstanding work order load.

Work should not be postponed past 90 days unless there is an problem that requires capital work. The goal is to get all work completed in less than 30 days.

19.5 How Much Work to Assign in a Day

The number of work orders that can be completed in a day will depend upon the nature of the job being assigned and the super's skill in arranging the work in the most efficient manner. This is an area for which we rely heavily on the judgment of the superintendents at each site. The BHA does periodically run a report of average times to complete tasks based on task code and can be used by the superintendent in scheduling work. Often the circumstances or location of a particular job can change the amount of time that you might expect a job to take, however. For instance, one toilet stoppage may take fifteen minutes or less to clear;

another may end up requiring that the toilet be removed to be cleared, then reset or replaced – two or three hours of work.

Superintendents should assign work out as if the work will take the minimum time expected, and then make adjustments if all the work cannot be completed. By doing this, the trades will have set up a day's work to maximize their efficiency. If, on the other hand, the worker is given work assuming that the jobs will take the longest time possible, they will end up wasting time coming back to the office for more work, the stock they need and so forth.

Superintendents are free to assign out work for a whole or half day at a time, depending on the nature of the work and/or trade in question. No more than one day's work should be assigned at a time, unless it is a single job that takes more than a day to complete. All work orders regardless of their stage of completion, should be handed into the superintendent at the end of the morning and/or the end of the day depending on the way the super schedules their work. If work is incomplete at the end of the day, the tradesperson still passes it back to the super at the end of the day to be rescheduled accordingly. No work orders should be kept in shops, cars, brought home or left in apartments overnight.

19.6 Actual Assignment of Work – Maintenance of Logs

As superintendents review the reports and assign work, all work orders being assigned must be logged onto the daily assignment sheet. This is a hand written log that is completed each day as work orders are assigned: [See Fam/Eld S-Drive, SOP Appendices Folder for sample master Work Order Tracking Log]. It may be kept electronically instead but it must be kept on the S:Drive so the PMS, Manager, or any other supervisor has access as well as the superintendent. Keeping the log on the super's I:Drive is not allowed. There are two logs in the folder above and either is acceptable, by employee or by development. This sheet must include the following information:

- Date
- Work order number
- Development name and number (some staff are scheduled regionally so this can be important)
- Apt number
- Assigned to (staff member name)
- Date returned and/or completed by staff
- Hours worked
- Comments (if incomplete, note why)

So:

- Review reports and decide what work orders to assign the next day
- Determine if the materials are available to complete the job and arrange for large amounts of stock (i.e. floor tile) to be delivered by laborers at the start of the work day
- Pull work orders from work order file and group by worker
- Record each assignment on the daily log
- Place work orders in bin for pick up the next day by the staff member
- The tradesperson is responsible, when picking up the work orders, to obtain all necessary stock to complete the job and to get keys (if work order indicates Permission to Enter).

Superintendents may decide to hold work orders in the office that the workers do not need to take with them to complete the assignment. This would generally apply to vacancy work and common area work; work in occupied units requires that the worker take the work order with him/her in order to leave a copy in the apartment or with the resident. Getting a signature from the resident is necessary if possible, too. Holding work orders in the office for the workers to fill out at the end of the workday helps avoid lost paperwork.

19.7 Completing Assignments/When Work is not Completed

At 12:00 p.m. and 4:00 p.m. each day, trades people will return to the office and turn in all complete and incomplete work orders. If an outside contractor does work, put "CON" in place of the employee I.D. If a new employee, contract or permanent, starts their employment without receiving their employee number or the employee number they received is not accepted in the work order system, contact the Human Resources Specialist who will provide the employee with a number and/or set them up in the work order system. All completed work orders must record the name/id # of the staff person completing the work, the number of hours spent on the job, all stock used in the job and if it was resident caused damage. All Emergency and Exigent work orders must also include the time the work was completed.

If the resident was at home, the resident must sign the work order. In all cases of occupied apartments, the yellow copy of the work order must be left with the resident or, if the resident was not home, in an obvious place in the apartment, such as the kitchen table. The superintendent reviews these work orders for completeness, initials them, records that they were returned and complete on the daily log and forwards the work order to the appropriate staff member for entering on the database. Remember to make copies of work done that applies to Preventive Maintenance and file in the annual Preventive Maintenance Service Record Binder (or use yellow copy).

All incomplete work orders must be returned by the tradesperson or other maintenance staff with information concerning the date they went to the apartment, how much time they spent and the reason why the work was not completed. Reasons that work orders are not completed include:

- No permission to enter and not home
- Not home slips are to be left twice, then a 48 hour notice is required
- Permission to enter but the key did not work
- Permission to enter but there was a dog in the apartment
- Other reasons pertaining to residents
- Stock was not available
- The work is more than a one day job or the work was started late in the day and not finished

In the last two cases, superintendents will arrange for stock and/or more time to complete the work and reassign the work the next day or at a later time as applicable.

In the first four cases, management may have to be involved. If there is no permission to enter, a 48-hour notice must be written up and delivered to the resident. In this case, the superintendent should record on the appropriate daily log that the work order is to be reassigned for the date noted on the 48-hour notice. If the key did not work, management and/or the maintenance superintendent will need to notify the resident of this and arrange for the resident to deliver to the office a new key. If a dog was in the apartment, a 48 hour notice needs to be issued indicating that the dog must be removed and/or the resident must be at home for the work to be completed. If there is any other resident issue (for instance, if the apartment was too dirty or too cluttered for work to be completed) management must be notified of the problem and have it resolved. In each of these cases, work must be rescheduled for completion. If the resident does not cooperate, the Superintendent must notify the manager to take additional action.

19.8 Periodic Reconciliation of Outstanding Work Orders

The use of the system described above should insure that work orders are not lost and that all work orders are accounted for at all times. However, it is wise to make sure that the outstanding work orders listed on the computer are the same as what is truly outstanding on at least a monthly basis. In large developments, this process should be completed weekly.

The following describes how to perform a work order reconciliation. All steps will not be required if this is performed regularly.

- As of a set day [usually Mondays], give all completed work orders to the office to be closed out and set a time to run a new report of outstanding work orders.
- Any work orders completed after that time should be kept in a separate place in maintenance office so that there is no confusion about work orders “in transit”. Keep these work orders separate until after the reconciliation is complete.
- When all completed work orders have been input, run a new list of outstanding work orders by work order number. Compare this list to all of the work orders in your work order file, any work orders which are in the completed pile that you have set aside, and work orders from the daily log which are with the workers that day. Use a highlighter to note all work orders found.
- Note that ER and NC work orders (ERS and Night crew) and CS, HD and OC (Central Services, Heating Department, and Occupancy Construction Crew) work orders are not likely to be on hand; check with these crews to see if the work orders are on hand there.

For those work orders not on hand in the maintenance office use the following process:

- Check files of completed work orders to see if any were marked as input but are still showing up on print out. If a work order is completed but no completion date is noted, the work order may continue to show up on the report. Pull from file to be re-input and mark on outstanding list with a different color highlighter.
- Make up tickets for all work orders not yet highlighted. These will be all those work orders not found in the office as incomplete or in the files as complete but not entered. Highlight these on the printout using a different color as the tickets are made.
- All work orders on the printout should now be highlighted in one of three different colors except for those coded CS, HD, OC, ER, & NC.
- Next check all current vacants to see if there are any outstanding work orders for those units that do not have a V status. Make sure that the required work is included on the V work order and if it is, mark the ticket to be completed on the V work order. Put the V work order number on the ticket for tracking and audit purposes and void the earlier workorder.
- All voided workorders go to the Work Order Center Supervisor for data entry. Superintendent's can not void work orders.
- Check to see if there are outstanding work orders for units that have been prepared for reoccupancy after the date of the outstanding work order. If there are, enter the number of the completed V work order on the ticket and mark it as completed by that work order.
- Check to see if an LUI Inspection was done after the date of the outstanding work order, if the completed L work orders include the work listed put the number of the L work order on the ticket and mark it as completed on that work order.
- Next, look for duplication. One work order might say “kitchen sink leak”, while another might say “sink in kitchen leaking” for the same apartment. When there is a completed work order for the same work dated after the outstanding work order mark the outstanding work order as completed on the later work order.

- For all other outstanding work orders have a person or persons physically go to the units that you have created tickets for, to see if work was done. If done, have craftsmen close them out as checked. The maintenance employee closing out the work order should sign the ticket. If the resident is home he or she should sign the ticket. The superintendent should review all of these “closed as checked” tickets and sign them before they are submitted to be completed on the system. These work orders will use a seven-day turnaround to determine the completion date. Pay attention to weekends and holidays when entering the date. For all emergency work orders, you record the completion date/time within 24 hours of the creation date/time or an abatement form must be filled out and submitted to the Work Order Supervisor.
- Give all checked or completed work orders to the work order center or on-site management aide to close out along with all other work orders completed during the period in which you were doing this close out exercise. **As part of this process be sure that no L work orders are voided. If this is done the record of the unit inspection itself will be removed from the system!**
- Finally when you have all this done you will have an accurate count that should coincide with the figures we are getting from the database.

19.9 Special Procedures for Tracking HID Work Orders

Whenever a Manager receives a citation from the Inspectional Services Department [ISD], the following procedures are to be used to insure that work is completed on time and that records are properly maintained both at the site and at a central location: [See Fam/Eld S-Drive, SOP appendices folder for ISD citation procedures updates]

- When possible, the manager or superintendent should accompany the ISD inspector for initial and follow up inspections. This is subject to the occupant’s consent.
- Immediately fax the complaint to the Work Order Center Supervisor, for their records.
- If any of the complaints are emergencies, create an emergency work order on the CCS system and complete the job immediately. The BHA agrees to prioritize ISD “Breathe Easy At Home” cases which are intended to assist asthmatic residents by eliminating housing code violations that are asthma triggers such as mold/mildew and pests.
- Create work orders for each of the items on the complaint and code them as “H” work orders. Record work order numbers on the citation and forward a copy to the Work Order Supervisor.
- The BHA Manager shall request an ISD administrative hearing within seven days of receiving a non-emergency abatement order, whenever more time is needed to correct the violation or if the BHA has any questions or concerns with the violations cited by ISD. The hearing will be requested through the Work Order Supervisor.
- Complete all non-emergency HID work orders within five days. **When completed, all HID work orders need to be inspected by the superintendent or manager and signed by them. When work is completed to the satisfaction of the supervisor**, submit the completed work order and/or ticket to be completed on the CCS system as soon as they are done. Notify the Work Order Supervisor that the work is completed for the complaint so that they can maintain their records up to date.
- Managers notify the ISD inspector by phone and in writing via FAX or e-mail that the work is done and that they may re-inspect. Keep a copy of the fax notification and a note as to when you made the phone call with the completed work order.

- Keep a separate file with copies of all citations, completed work orders, record of the fax or e-mail notification to ISD that the work is completed and record of when you called ISD to notify them that the work was complete. Keep this file by unit number in a separate file with the work order files. The original workorders should still be filed by unit in the work order files. The separate file should be a duplicate for easy access.
- There is an HID tracking log for each development on the Public P:Drive, HID folder for tracking citations, work orders and hearings regarding all ISD issued complaints.

19.10 Special Procedures for Tracking REAC inspection work orders

HUD conducts inspections of BHA properties once per year. All work orders created through this process receive special codes:

X = Exigent (emergency): These work orders are written the same day as the inspection and completed within 24 hours. Special reporting provisions apply to these work orders (See Fam/Eld S:Drive, SOP Appendices folder)

N = Non-Life Threatening Life and Safety Hazard

D = Defect, Other

C = Referred to Capital

The following rules apply to creating and tracking REAC inspection work orders once you have received the detailed copy of the REAC report:

1. Go through the report and mark in red ink the work order number and date of all Exigent (X) priority work orders issued (these were done on the same day as the inspection).
2. Prepare work orders for all remaining work items using the following codes:

Requested by: H -- All such work orders are to be issued with the requested by H (HUD) code.

Priorities are as follows for use by HUD work orders only:

N = Non-life threatening health and safety defect. These are those items, which have a small NLT noted after the description in the second column.

D = Defect, other. Use this for all defects noted which are life-threatening or nonlife-threatening defects.

C = Refer to capital. Use this code for all FHEO defects. It will also be used for all items that are outside the capacity of normal operations and must be put onto a capital plan, but only after you have consulted with the Assistant Director of Property Management, Program Maintenance Supervisor and Director of Building Services. This consultation may again be a quick phone call or it may take a meeting. However, except for FHEO items, no items should be coded C priority without the agreement of senior staff.

3. As work orders are written, note the work order number and date next to the item on the REAC report, as you do for LUIs. You will want to refer to your notes before writing work orders, as the REAC descriptions are not always clear as to the specific problem or location.
4. When all work orders are written, submit the annotated list to the ADPM Administration, Operations, 52 Chauncy Street. **This list is due within five working days after receiving the report from HUD.**
5. The work order center will write the work orders at your request, but the Manager is responsible for ensuring that all work orders are written within five days.

6. Complete all work orders as quickly as possible and process the completed work orders as you do all other completed work orders. File work orders by unit, but keep an extra copy in a separate REAC folder.
7. As soon as they are printed, submit all work orders coded "C" for refer to capital to the Operations Department for processing.

19.11 Weekly Work Order Reporting

At a minimum, a work order report will be run weekly by the superintendent which can be sorted by date, priority, and by apartment. This report will be used to schedule work on a daily basis.

The Program Maintenance Supervisor, Regional Manager and/or the Assistant Director of Property Management can run the same report for each development or their entire portfolio for many reasons. The PMS will use the report to appropriately staff each development with tradesmen. The report can be used to track vacancy work at each development or productivity of the development.

19.12 Using Licensed vs. Non-Licensed/Neutral Tasks

19.12.1 Trade Union Structure

The Boston Housing Authority, unlike most housing management organizations, employs skilled trade's workers to perform the majority of its repairs. Historically, the trades people hired have worked only, or mainly, within their own trades. The majority of these workers come from the Carpenters', Plumbers', Electricians', Pipefitters', Plasterers', Tilesetters', and Painters' Unions, though the BHA also employs a limited number of glaziers and other workers. Thus the BHA has tended to mirror the construction industry, rather than the housing maintenance industry, in the make up of its work force.

The BHA did gain more flexibility when the Neutral Tasks list was developed and agreed upon by the Boston Trades Council (BTC) and began to mirror the rest of property management. Under that agreement with the representatives of the BTC, a list of "neutral" tasks was developed which all trade union employees were allowed to perform. These tasks are set out in the attachment to this chapter. In addition, at this time, all trades workers, while hired through the Union halls, are titled Mechanics – Mechanic 1 indicates a licensed tradesperson; Mechanic 2 indicates a non-licensed tradesperson. Their formal title includes their trade as well (i.e. Mechanic 1/Electrician or Mechanic 2/Carpenter). In 2007, another contractual agreement was made between the BHA and the BTC giving the BHA even more flexibility. All non-licensed work in addition to the Neutral Tasks list, can be performed by any BTC member.

It is important to note that workers in other unions – such as laborers and resident custodians– are not covered by this agreement. The non-licensed tasks and neutral task list are limited to trades workers. Certain tasks of plumbers, electricians, burner technicians and pipefitters require a license and can not be completed by non-licensed workers. Certain other, non-licensed but highly specialized tasks – such as spray painting – are also non-licensed and not on the neutral tasks list but should be performed by the appropriate tradesperson.

19.12.2 Benefits of Non-Licensed and Neutral Tasks

By implementing non-licensed and neutral tasks, we mirror the rest of the property management world by having a flexible work force. Some of the immediate benefits:

- Workers become more flexible and can perform a wider variety of tasks.

- A worker in progress on a job does not always have to be pulled to perform certain emergency work, another worker can be assigned.
- A lot of little work orders can be completed at one time in a unit or building by grouping work orders by location rather than by worker.
- Workers can more easily cover for each other during vacations or when a particular worker is at another site.
- Workers will lose less time moving from apartment to apartment when they concentrate work in one location.

19.12.3 How to Use Non-Licensed Tasks and Neutral Tasks

In order to use Non-Licensed and/or Neutral Tasks Lists, we have to look at and organize both work orders and workers in a different way. It will be necessary to review work orders not just by trade and age of work order, but by apartment and address. This is why in the previous chapter Superintendents are asked to review work order lists by age, by apartment and by trade. Generally speaking, whenever a worker is sent to do a work order in an apartment, they should do all of the outstanding non-licensed work at the same time. For instance, if a plumber is sent to the unit to replace a kitchen sink trap, he can also fix a closet rod and replace floor tiles in the bathroom or on the kitchen floor.

In order for this to work, each worker will need to bring the appropriate tools and materials with him/her – this will take some work on the part of the supervisor, as many workers will not always remember this additional step. Trades will not be expected to own their own hand tools except for those within their own trade. Therefore, Superintendents will need to keep spare tool kits/boxes available for non-licensed work.

Other important ways to group work orders include vacancies and LUI work. Depending on the level of work needed in an apartment, one worker may be able to be assigned to do a good number of the tasks – freeing up other workers to work elsewhere in the development, and making the worker more efficient by keeping down travel time. With an enhanced LUI program, it's especially important to obtain maximum efficiency, as many work orders will be initiated at the time of the inspection.

It won't always be possible to use all staff all the time to perform non-licensed work. If your electrical backlog is very high, for instance, mainly involving licensed work that must be completed by an electrician, you may have to keep the electrician working strictly on electrical work.

At the same time, you may have some workers on staff whose workload within their trade is fairly low. You may want to concentrate these workers on general, non-licensed work.

19.12.4 Neutral Tasks List

All trades may complete the following tasks in addition to all non-licensed work and any licensed tasks specific to their license: [See Fam/Eld S: Drive, SOP Appendices for the latest updated listing]

Plumbing

- Unclog routine stoppages (up to use of 25 foot handwire) including opening clean-outs under sinks
- Install toilet seats, soap dishes, toothbrush holders, towel racks, and toilet paper holders
- Replace showerheads and aerators
- Replace faucet handles
- Install medicine cabinets and mirrors
- Connecting washer hook ups
- Turn valve to close gas or water in an emergency
- Use of non-acidic drain cleaner for sink and tub stoppages
- Replace sink and tub stoppers

Electrical

- Replace switch plates, outlet covers, and interior light lenses

- Replace smoke detectors- battery operated or plugs in component only of electrical smoke detector
- Resetting circuit breakers - in apartments, 15 amp and 20 amp only
- Replace appliances of any type up to 120 volts
- Replacement of top burner elements on electric stoves, plug in type only

Carpentry

- Install closet poles
- Install curtain/shade rods and brackets
- Repair/replace door checks
- Install door hardware (interior wood doors only)
- Repair of VCT floor tile
- Make keys
- Routine repair/replacement of locks (normal working hours)
- Repair mailboxes
- Repair/replace peepholes
- Install thresholds
- Repair window sash
- Repair window frames
- Install weather stripping
- Install shelves
- Install ceiling tiles, replacement tiles only
- Hang signs, pictures, bulletin boards and other similar items
- Assembling furniture, shelving, benches or other "kit" type items

Glazing

- Repair/ replace balance rods
- Repair screens and screen doors
- Repair handles and chain/safety screens
- Repair /replace window glass

Steamfitting

- Secure radiator valves
- Replace radiator covers

Painting

- Limited to brush or roller painting on jobs of a smaller nature

Plastering

- Limited to patch work only up to 8"square (no wire lath)

Ceramic Tile

- Replacement of up to 12"square of ceramic tile

Caulking

- Caulking

Safety Items

- Install window guards
- Removal of closet doors

19.13 Appendices to this Chapter

Appendices to this Chapter can be obtained on the Public S: Drive in the folder labeled **SOP Appendices**, in the sub-folder labeled **Chapter 19 – Sched. & Neutral**. Appendices include Work Order Tracking Log; Work Order Reconciliation, Neutral Task Lists etc. **Note:** appendices are subject to addition and change at any time.

Chapter 20 Vacancy standards and turnaround methods

20.1 Vacancy Reduction Procedure

Standard: Vacate date to re-occupancy should not exceed 30 days: Complete all Work orders within 15 days.

Steps:

- ☐ Manager generates two work orders within 24 hours of vacate date or discovery of vacate to inspect the vacant apartment and change the cylinder (use of keyed alike vacancy cylinder required). The Manager should fill out the vacancy action form (VAF) within 24 hours and note the work order numbers for the perform inspection and change cylinder work orders on the VAF form before submitting it. Give keys to Superintendent.
- ☐ Inspect unit within 48 hours/complete vacancy turnaround process (VTP) form, complete inspect vacant apartment work order and generate all necessary renovation work orders. First, check the outstanding work orders for the apartment and close out all non-vacancy priority work orders. Make a comparison of outstanding work orders and your inspection to ensure all work orders are generated for all deficiencies and corrected during vacancy turnaround. Record all work orders on the VTP form
- ☐ Generate clean out work order if necessary and clean-out unit within 48 hours.
- ☐ Work orders should be created for vacancy turnaround in two categories, rough and finish work orders. See procedural steps for trades' assignments below.
- ☐ Order stock if not in inventory. Make sure all common stock items are in inventory for vacant turnaround. To do this, reorder points need to be high enough to cover lead time on items. When a resident gives notice that they are moving, a pre-move out inspection would be helpful to determine what long lead time items like cabinets and countertops are needed. You can order them before the tenant vacates and avoid waiting for orders which lengthens turnaround time.
- ☐ Perform necessary renovation tasks. To ensure timely completion of all tasks, supervisors should assign work flexibly and productively utilizing various crafts skills, training and experience taking into mind the licensure provisions of the law. This increases efficiency in scheduling and lessens cost associated with remobilizing workers for short work assignments. Contractually there are only two categories of work, licensed and non-licensed which gives superintendents this flexibility when scheduling work.
- ☐ Re-inspect unit, develop a punch list if there are still tasks to be completed and generate work orders.
- ☐ Houseclean unit.
- ☐ When all tasks are complete deliver key package (change all cylinders for reoccupancy) to the Manager.

To obtain a 30-day or less turn-around time, a supervisor should follow a "first in, first out" out policy when scheduling rehab tasks. Of course, those units that require little work to turnaround and can be put back on line quickly should be done a.s.a.p. This will give you extra time to renovate those units that take longer than the average turnaround.

20.2 Vacancy Turnaround paperwork

All work must be tracked using the Vacancy Tracking Form in your electronic SOP profile folder or Regional folder. PMSs must determine estimated date of completions based on the superintendents' inspections and record it on the Tracking Form. Updates to the Vacancy Tracking Form should occur daily as work

progresses. ADPMs, Regional Managers and PMSs should monitor progress by reviewing the sites tracking form as needed. Staff should be assigned by the PMSs by reviewing vacancy turnaround needs from work order reports and the Vacancy Tracking Form. Actual dates of completion are the dates that all work has been completed including punchlist, houseclean, new cylinders and the key package has been turned back to management. Move in dates will be established by the manager.

The vacancy package paperwork will include (in order below):

1. Vacancy Turnaround Process Form
 - a. Apartment number and address,
 - b. Inspect vacant apartment work order number, bedroom size and floor.
 - c. First section of form: List all work needed and any comments. If not enough room for comments, use the back of the form.
 - d. Second section of form: List all work order numbers created after inspection completed. Record date work orders are assigned and date work was completed and returned to the superintendent.
 - e. Third section of form: punch list items and work order numbers.
2. Copy of vacancy action form (VAF) with inspect vacant work order number recorded on form.
3. Copy of lead paint form if no lead.
4. Copies of all work orders. When work is completed, copies of the completed work order filled out should replace the original.

All vacancy package paperwork should be maintained in the superintendent's office and paperwork added as it is completed. When all work is complete and the key package has been turned over to management, the vacancy paperwork package should be filed by apartment number somewhere easily assessable. This is in addition to filing the white copies of the work orders in the apartment files.

20.3 Procedural Steps for Trade Assignments

As a general rule, work should be performed in the following order as needed.

- ☐ Install vacancy cylinder.
- ☐ If needed, have your contractor treat the apartment for roaches, bed bugs, and/or rodents.
- ☐ Clean out apartment.
- ☐ Check red files to see if apartment has lead. If there is lead or no paperwork and built prior to 1978, follow RRP rules. If no lead, attach lead paint form to vacancy package declaring there is no lead and that proof is in the red files.
- ☐ Appliance man: Check condition and disconnect stove (Plumber for gas stove). Remove appliances if replacing.
- ☐ Rough Plumbing: disconnect kitchen sink, lavatory sink and stove if gas.
- ☐ Rough Carpentry: remove doors to be replaced and pre-hang new doors without finish hardware, disassemble cabinets for replacement.
- ☐ Rough Electrical: remove all outlet/switch plates and check; check and remove all fixtures/range hood/ventilation fans/smoke detectors/carbon monoxide detectors to be replaced. Install outlet for the gas stove (electric ignition) if there isn't one.
- ☐ Clean out demolition debris.
- ☐ Plaster apartment.
- ☐ Tape and paint apartment.

- ☐ Laborers/J.G.s – tear up floors to be replaced and remove debris.
- ☐ Finish Carpentry: Replace window sash/hardware, screens, replace floors, repair thresholds and molding between rooms, install door hardware, replace base/wall cabinets and countertop, install peephole, repair doorframes/window sills and frames.
- ☐ Finish Plumbing: reconnect stove (unless replacing), install kitchen sink/piping, install/repair washing machine valve, lavatory sink/piping, repair toilet/replace toilet seat, bath accessories, shower valve, shower head, clean/clear all drains.
- ☐ Repair ceramic tile/grout/caulking.
- ☐ Finish Electrical: replace/repair switches/outlets/wiring, repair/install light fixtures/range hood/ventilation fans, replace smoke detectors/heat detectors/carbon monoxide detectors.
- ☐ Remove debris from construction and houseclean.
- ☐ Inspect apartment and create punch list/work orders.
- ☐ Complete punch list items. Clean up any debris and clean areas affected by punch list.
- ☐ Deliver appliances – plumber connects new stove.
- ☐ Install new shades, window guards and install new cylinders (doors and mailbox).
- ☐ Make key package for new tenant and give to the manager.

20.4 Vacancy Preparation Standards

Clean out:

- ☐ Every item left in apartment must be removed.
- ☐ All cabinets including drawers emptied and hepa filter vacuum the entire apartment include all closets, base cabinet, wall cabinet and all drawers.
- ☐ All appliances should be cleaned of all contents.
- ☐ Defective appliances should be disposed of.
- ☐ Vent filters should be cleaned or replaced and ducts cleaned in kitchens and baths
- ☐ All old pesticide gels or baits shall be removed and area thoroughly cleaned (this must be done prior to prep and paint). Hepa vacuum all areas to remove dead, live cockroaches and rodent droppings. Clean cockroach excrement from walls, ceilings, cabinets, etc.
- ☐ Clean around all heating elements (radiators, convectors, etc.). If necessary, remove covers and have disconnected if unable to access under and around.

Plastering/Ceramic Tile (Plasterers or Ceramic Tiler completes only if major work is required. If there are only small holes, the painter can prepare the surfaces for paint.)

- ☐ All nails, screws, hooks, mirrors and shelving removed.
- ☐ All flaking paint should be removed from walls/ceilings.
- ☐ Any plastered surface should have feathered edges.
- ☐ Wall under sink base should be free of any holes.
- ☐ Old caulking should be removed before new sealant is applied. Use white silicon caulking on tubs and sinks, not white latex caulking.
- ☐ Grout lines should be free of mold. If mold exists lines should be raked and new grout applied.

- ☐ When possible, same color tile should be used when patching tile. If the same color is not available, use a contrasting color and make a pattern or do a standard size (square or rectangle) with contrasting color tile. Do not replace in-the-wall ceramic tile soap dishes/cover with flat tile.
- ☐ All gaps around pipes coming from raceways should be carefully sealed. Use copper wool, then spackle or joint compound on all wall openings, copper wool and an escutcheon plate on floors, and copper wool and caulking on ceilings) Do not use steel wool in place of copper wool. Steel wool will rust and disintegrate when wet.
- ☐ Any visible holes, caused by rodents, should have copper wool inserted and then properly sealed.

Taping:

- ☐ All switch/receptacle plates should be removed and saved, if new, or discarded if old, before device is taped.
- ☐ Both appliances should be properly covered to protect from over-spray or removed from the apartment to be inspected, repaired if necessary and cleaned before returning them to the apartment before occupancy.
- ☐ Sprinkler heads need to be taped. If sprinkler heads have any paint on them, they need to be cleaned or replaced.
- ☐ When taping floors, cove base in good condition should always be taped. Vinyl cove base should only be painted when necessary.
- ☐ All wallpaper/wall coverings/ contact paper, etc, must be fully removed.

Painting:

- ☐ All surfaces should be properly prepared. Prime where necessary. Do not use alcohol-based primer in spray machines. Example: Spackle all nail holes, sand feathered edges and prime.
- ☐ All screens should be raised or removed when windows are open to protect from over-spray.
- ☐ All ceilings in poor condition should be skip troweled by plasterer or pop-corned by painter. Additives are available for popcorning, and popcorn repair, spray cans may be used.
- ☐ All tape and paper must be removed and bagged by the painter when painting is completed. Tape left on too long becomes very time consuming to remove later.
- ☐ Any over-spray that might have occurred should be removed by painter.
- ☐ Repaint and re-number apartment doors

Carpentry:

- ☐ Floors that are very worn should always be replaced.
- ☐ Flooring should never exceed (2) courses. If asbestos tile has to be removed, a licensed contractor must be used.
- ☐ When flooring is removed to its base, proper preparation using levelastic should be followed to ensure a level and smooth finish.
- ☐ Interior doors should be replaced when:
 - ☐ Large hole exists. No patching should be allowed.
 - ☐ Hinge side of door is cracked.

- ☐ Sink base cabinets should be replaced when flooring is defective. Covering moist rotted wood will only lead to a mold or extermination problem later.
- ☐ Never allow face screws or nails when repairing drawer fronts. Sheetrock screws are not to be used when installing doors. Ensure all proper hardware is utilized when doing vacancy turnaround.
- ☐ All windows should have operational locking mechanism and the glass should be free of excess condensation – replace fogged glass if needed. Also, check window balance rods.
- ☐ If the prospective tenant has requested window guards, install them per manufacturer's installation instructions prior to move-in.
- ☐ All screens should be free of any defects and on all windows.
- ☐ Apt. doors should be weather tight, with properly installed deadbolt lock and clear peephole.
- ☐ All rooms should have properly installed base board/cove base, free of any defects where applicable. Make sure all cove base is tight to wall; cockroaches use loose cove base as a raceway and the glue is a favorite food source.

Plumbing:

- ☐ Every drain should be snaked a min. of 10'.
- ☐ Operational shut-off to fixtures is mandatory; replace or install if needed.
- ☐ Hot water temperature should be checked at all fixtures. Between 110-130 degrees.
- ☐ New toilet seat should be installed.
- ☐ Bathroom accessories should be replaced when:
 - ☐ Visible defect
 - ☐ Paint can't be removed
 - ☐ Not of BHA issue
- ☐ All improperly installed or abandoned gas lines should be removed.
- ☐ Where applicable, install new washer valve connections with check valves.

Electrical:

- ☐ New smoke detectors and CO detectors should be installed and properly located. If already installed and battery operated, all batteries should be replaced.
- ☐ All old 2 prong receptacles should be replaced with grounded, three prong receptacles (may be grounded to box)
- ☐ All painted switch/receptacles plates should be replaced.
- ☐ All G.F.I.s must be tested. If non-GFI type receptacles exist in bathrooms or on counter-top walls they must be replaced with GFI outlets.
- ☐ Any painted lamp should be replaced.

Appliance:

- ☐ All stoves should be disconnected at beginning of renovations.

- ☐ Both appliances should be thoroughly inspected, cleaned and repaired.
- ☐ Anti tip devices for stoves should be installed and care made to make sure they are working properly.
- ☐ Electric stoves require a firestop device. If there isn't a range hood, install a blank range hood to the cabinet above the stove and then attach the magnetic device.

Steamfitter:

- ☐ All non-functioning valves should be replaced.
- ☐ All traps should be replaced and listed in P.M. log.
- ☐ All damaged or missing pipe covering should be replaced, including heating unit covers.
- ☐ Do not leave heating pipes uncovered.
- ☐ Replace all furnace filters and place a date on the filter for future replacement.

Housecleaning:

- ☐ All floors should be stripped and waxed.
- ☐ All cabinets should be vacuumed and polished.
- ☐ Stove and refrigerator thoroughly cleaned.
- ☐ All radiators/convectors should be vacuumed.
- ☐ All windows should be cleaned on both sides.
- ☐ Range hoods cleaned and filter replaced.
- ☐ Tub area scrubbed with no dark grout lines.
- ☐ All chrome bath fixtures should be polished.
- ☐ Install new shades if needed (existing shades if clean and not torn may be left)

20.5 Final Comments and Hints

Take advantage of turning over vacant units to perform cyclical and preventive maintenance.

For instance, you should change out all steam traps and valves, replace all furnace filters, check and replace if needed all shut off valves, replace faucet sets, give the drain pipes a good routing, replace traps under sinks with new PVC, install new breaker boxes, change out all receptacles and switches, etc. If your budget can handle it, especially in developments where there has been little or no unit modernization, you might consider replacement of at least the old kitchen sink with a new base cabinet/sink/counter set up.

Each time you perform routine replacements of this kind, you will be avoiding troublesome work orders in the future.

20.6 Appendices to this Chapter

Appendices to this Chapter can be obtained on the Public S: Drive in the folder labeled **SOP Appendices**, in the sub-folder labeled **Chapter 20 – Vacancies**. **Note:** appendices are subject to addition and change at any time.

Chapter 21 Living Unit Inspections

This chapter provides all information required to perform Apartment Inspections, create work orders, and maintain necessary paperwork

21.1 Purpose and Goals of Apartment Inspections

Apartment inspections shall be performed at least annually. Additional inspections are performed at move-in, move-out, during vacancy turnover, as preparation in eviction cases, if a maintenance mechanic, contractor or other visitor to the apartment reports problematic conditions in the apartment, or if a resident requests it. This section deals primarily with the processes used in the annual apartment inspection program, also referred to as the Living Unit Inspection (LUI) process.

An effective apartment inspection program is the core of the development maintenance program.

Thorough inspections allow the site staff to learn the true condition of the occupied units on the site and correct deficiencies while they are small. They provide a method for predicting and scheduling maintenance activities rather than relying on finding out about needed repairs from resident call in, which is unpredictable and not reliable. By performing work when it is discovered during an inspection, the management staff takes control of determining what maintenance work must be completed and when it must be completed.

These are the goals to be achieved through good apartment inspections:

Establish a basis for a proactive maintenance and repair program. By performing properly scheduled unit inspections, follow-up repairs can be scheduled and staff deployed efficiently. Randomly responding to resident requests does not permit staff to schedule staff's time and ensure that needed materials are at hand. This includes repairing minor items at the time of inspection, so as to reduce the backlog of work orders created (*The Unit Inspect & Repair Program - see chapter 22*).

Create an information base that assists in planning capital investment. Staff can use the information obtained through the inspection process to identify systemic problems that require capital replacement rather than simple repairs.

Identify and remedy housekeeping problems. When staff inspects a unit and discovers poor housekeeping, development management must work with the resident to achieve compliance with appropriate standards. If the housekeeping problems appear to be related to a medical or mental health condition, management should attempt to work with service providers to correct the problem. Appropriate lease enforcement actions must be taken when necessary.

Create an opportunity for resident contact and information sharing. The inspection provides an opportunity for the resident and management staff to share information about the apartment. Residents can point out deficiencies and management staff can make sure that resident knows how to properly use and care for items in the unit.

21.2 Standards for Apartment Inspections

The Boston Housing Authority inspects apartments to the standards of the Massachusetts State Sanitary Code (MSSC) and the HUD Uniform Physical Conditions Standards (UPCS). Any violations of these standards must be recorded as a deficiency and a repair made. The following lists the standards in the same order as the Apartment Inspection Form checklists. These standards should be carefully reviewed and must be adhered to.

21.3 Health and Safety Items

The following items are considered health and safety deficiencies under HUD's UPCS code. Certain items among them (those which are shaded) are considered Exigent, or emergency conditions, whenever found. The remaining items are considered Non-Life Threatening Health and Safety conditions. Some items are only considered a health and safety deficiency if they are damaged to a certain level, called level 3 in HUD's coding system; others are always a health and safety violation, though they may not be exigent (such as call-for-aid pulls).

Some of these items are included in the Health and Safety portion of page 2 of the inspection form; others are in the room by room checklists on pages 2 and 3 of the Apartment Inspection Form.

Special attention needs to be paid to all of these items. Items that are considered exigent must receive an emergency work order rather than the standard LUI work order. The exception to this rule is for those work orders, such as replacement of a smoke detector battery, which are completed at the same time that the inspection is conducted and must be recorded on the Perform LUI work order.

Note that the only Health and Safety items listed here are those that may be found inside an apartment. Items that are considered life and safety violations, which are found outside, in common areas or on the building envelope are included in the Buildings and Grounds (Part 2) and Building Systems (Part 4) chapters of the SOP.

Air Quality – Sewer Odor

Air Quality – Odor of Gas

Air Quality – Mold or mildew

Call for Aid Inoperable

DHW Heater or HVAC unit – mis-aligned chimney/ventilation

DHW heater or HVAC unit – missing Temperature and pressure valve or outlet piping missing or piping more than 18" from the finished floor

DHW heater or HVAC unit – rust/corrosion on chimney

Doors – Damaged/missing Screen/Storm/Security Door

Doors – Missing

Doors – Damaged frames/threshold/lintels/trim

Electrical Panels & Equipment – missing breakers, missing covers, exposed wires/open panels, water leaks on or near

Electrical panels & equipment – burnt breakers, evidence of leaks or corrosion, blocked access/improper storage

Emergency Fire exits – blocked or not useable

Emergency Fire exits – missing exit signs

Fencing – damaged/leaning/falling/holes/missing sections

Flammable Materials improperly stored

Garbage and Debris – Indoors, Outdoors

GFI Inoperable

Hazards – sharp edges, tripping, other

Heater – Inoperable unit/components

HVAC – fuel supply leaks, general rust/corrosion

Infestation – Insects, Rodents, other vermin

Kitchen Cabinets missing/damaged

Kitchen Counter missing/damaged

Kitchen or Lavatory Sink missing/damaged

Lighting – missing/inoperable fixture

Outlets & Switches – missing/exposed wires

Outlets & Switches – missing/broken covers

Plumbing – clogged drains

Plumbing – leaking faucets/pipes/flushometers

Plumbing pipes/drains – broken, leaking, clogged
Plumbing – Toilet – damaged, clogged, missing
Plumbing – water supply inoperable
Refrigerator – Missing/damaged/inoperable
Shower Tub – Damaged, missing
Smoke detector – missing, inoperable
Stairs – Broken/missing handrail or steps
Windows – cracked/broken, missing panes, inoperable, not lockable
Windows – Security bars prevent egress

21.4 UPCS/Mass. State Sanitary Code Standards

21.4.1 Entry Door

Entry door locks in working order, no damage to door, door hardware secure, glass intact if present, peep hole intact if present, opens and closes freely, weather tight, painted and surface in good condition, unit number clearly displayed, door surface clean. Frame, header, jamb, threshold, lintel and trim intact. Seals and weather stripping intact (where applicable). Where door closers are required, the door closes and latches on its own when opened half way. If there is a screen door present, all applies with the addition of the screen (seasonal) present and intact, glass present and intact. Note: this section applies to rear doors as well, for those units with two entrances.

21.4.2 Foyer

Floor Tiles/Wood/Cove Base/Linoleum

No bulging/buckling/cracked tiles, no holes in floor, no evidence of rot or damage to sub-flooring, Cove base securely attached to wall and not cracked. If linoleum is present, make sure it is intact and no tripping hazards present

Walls/Ceilings

Smooth surface, no flaking/peeling paint, no holes/cracks, no evidence of water damage, no mold/mildew, no buckling/bulging, no evidence of current leaks. Cove base/baseboard in tact.

Electrical – Outlet/Switch/Light

If light fixture is present, globe in place and unbroken, switch plate intact, electrical switch operable/pull chain operable if present, outlets working, outlet covers intact.

Closet Door/Shelf/Pole

Door present if intended to be there, undamaged, no holes, painted/stained, hardware intact, no damage to door frame/jamb. Shelf/pole present if intended, secure to wall/bracket.

Smoke Detector/Sprinkler/Heat Sensor

Present and functional, test to make sure it is operable by pushing the test button, not covered/painted over. Sprinkler head should not be covered/painted. No items should be hanging on sprinkler line. Heat Sensor should not be covered/painted. No masking tape on sprinkler head or heat sensor.

Intercom/Entry Bell

In good condition, operable.

21.4.3 Miscellaneous

The following apply to some units and not others. These may be N/A on many apartment inspection reports.

Exterior Steps & Rails

Steps - Clear, structurally sound, no evidence of rot and stair treads are secure and unbroken. Adequately lit.
Railings - Secure and firmly attached to wall. Present on the open all stairways of 4 or more steps, at least 36 inches in height. No missing balusters (where needed) balusters not more than 6" apart.

Interior steps & rails

Steps - Clear, structurally sound, no evidence of rot and stair treads are secure and unbroken. Adequately lit.
Railings - Secure and firmly attached to wall. Present on the open side of all interior stairways, at least 36 inches in height. No missing balusters, balusters not more than 6" apart.

Private Yard Area

No accumulation of debris; fencing in good condition; exit ways clear for emergency egress; landscaping in good repair. Gutters/downspouts secure, splash blocks in place. (Resident may require citation).

Storm/Screen Doors

No damage to door, door hardware secure, glass intact if present, opens and closes freely, weather tight, painted and surface in good condition, door surface clean. Frame, header, jamb, threshold, lintel and trim intact. Screen or glass/plexi-glass present and intact (seasonal).

Patio/Porch/Railing/Balusters

Secure to building. Railings and balusters in place and secure; at least 36" high where porch is 30" or more above the ground. Balusters not more than 6" apart.

Laundry Area / Ventilation

Hot and cold water hook ups secure and not leaking. On/off lever is operable. No odor of gas (gas dryers). Electrical connections secure (electric dryers). Properly vented outside unit through vent opening or appropriate window vent.

Other

Use this section to record any deficiencies in the basement of row-house units including, where applicable:

- Stairs – steps & railings
- Ceilings/Walls
- Electrical – outlets, switches, lights and panel
- DHW & Heater/Furnace
- Windows/Doors/Bulkhead
- Pipe Insulation
- Smoke Detectors
- Slop sinks/drains/floor drains/sump pumps
- Inappropriate storage or use of basement as dwelling area
- Improper tenant attachments to electrical panel, gas piping or hot/cold water piping

21.4.4 Kitchen

Door & Hardware

Door should be present, no holes/damage and painted. Hardware should be intact and functioning, no tenant installed locks, hinges intact and functioning, door jamb, frame and threshold intact and unbroken. Door closes easily and fully. Door is painted or varnished.

Window - Frame/Sash/Glass/Screen/Shades/Window Guards

If apartment is third floor or below, window may be considered an egress and must not be blocked by furniture, air conditioners (unless an exception has been allowed and is documented for a resident's health reasons), or security bars. Windows must open and close easily and stay in open position. Locks must work. Window frame should be in good condition, rust free, paint intact, no peeling paint on sill or frame, no evidence of water leakage. Glass is present and unbroken, seal intact, no fogging. Screen present,

unbroken and operational. Shades are installed at turn over only and brackets must be present and secured. Security Screens intact and operable. If window guards are present, they must be secure and open properly in the event of emergencies.

Floor Tiles/Wood/Cove Base/Linoleum

No bulging/buckling/cracked tiles, no holes in floor, no evidence of rot or damage to sub-flooring, cove base securely attached to wall and not cracked. If linoleum is present, make sure it is intact and no tripping hazards present. No evidence of bulging of sub-floor. No evidence of water infiltration, mold or mildew.

Walls/Ceilings

Smooth surface, no flaking/peeling paint, no holes/cracks, no evidence of water damage, no mold/mildew, no buckling/bulging, no evidence of current leaks. Cove base/baseboard in tact. All surfaces painted.

Electrical – Outlet/Switch/Light/GFI

Light fixture operates, light globe in place and unbroken, switch plate intact, electrical switch operable/pull chain operable if present, outlets working, outlet covers intact. If GFI present, GFI operable and cover plate intact.

Electrical – Breaker Panel

Breaker panel cannot be blocked by any appliance/furniture. Breaker panel is covered and cover is secure. Panel opens easily and no rust is present on cover/hinges. No evidence of water leaks, burning or charring, no exposed wires or open breaker ports. No evidence of corrosion or frayed wires.

Plumbing/Sink

No leaks at faucets, shut off valves or supply pipes. No leaks in drain or trap under sink. Hot water not more than 130 or less than 110 degrees; drains run freely. Adequate water pressure, hot and cold water. Sink secure to wall/counter, surface not unduly chipped or stained. Stopper available/working.

Countertops/Cabinets/Open Shelving

Surface should be smooth, unbroken/cracked, back splash secured, caulked as needed and no evidence of rotting or lamination peeling. Base cabinet drawers work freely, doors work freely, hardware intact, no evidence of base cabinet floor rotting or water leaks. No evidence of grease build up. Wall cabinets securely attached to wall, shelving secure, doors open freely and hardware intact. No evidence of grease build up on wall cabinets. No evidence of rotting or lamination peeling. Open shelving secure/painted, no evidence of grease build up.

Stove - Oven/Burners/Hood

Range hood fan and light (if present) operable. Clean, without undue build up of grease, filter clean. Oven turns on and heats up; all burners turn on and heat up. Knobs move freely and if present, all indicator lights operable. Oven and broiler doors open freely, close securely. Oven, broiler area and stove top free from grease. Anti-tip device installed for stove.

Heating Unit - Heat Pipes/Pipe Covering/Thermostat

Heating unit is operable, no sign of water leaks, corrosion, charring or improper burning. If baseboard heat, covers should be in place and not blocked by furniture and no wires/extension cords resting on unit. No sharp edges on covers. All heat pipes in unit should have appropriate pipe covering. No abnormal vibration or noise from system, including from fan units. Thermostat operable and cover in place.

Refrigerator

Doors open freely and close securely. Adequate temperature for cooling food. Gaskets intact. Shelves/drawers/door bars intact. No excessive build up of ice.

Hot Water Heater

If present, no water leakage, corrosion, rust, exposed wiring, gas odor, soot/scorching. Pressure relief valve extends to within 18" of the floor. Chimney/ventilation properly aligned.

Smoke Detector/Sprinkler/Heat Sensor

Present and functional, test to make sure it is operable by pushing the test button, not covered/painted over. Sprinkler head should not be covered/painted. No items should be hanging on sprinkler line. Heat Sensor should not be covered/painted.

21.4.5 Bathroom

Door & Hardware

Door should be present, no holes/damage and painted. Hardware should be intact and functioning, privacy lock functions, no tenant installed locks, hinges intact and functioning, door jamb, frame, header, lintel, trim and threshold intact and unbroken. Door closes easily and fully. Door is painted or varnished.

Window - Frame/Sash/Glass/Screen/Shades/Window Guards

If apartment is third floor or below, window may be considered an egress and must not be blocked by furniture, air conditioners (unless an exception has been allowed and is documented for a resident's health reasons), or security bars. Windows must open and close easily and stay in open position. Locks must work. Window frame should be in good condition, rust free, paint intact, no peeling paint on sill or frame, no evidence of water leakage. Glass is present and unbroken, seal intact, no fogging. Screen present, unbroken and operational. Shades are installed at turn over only and brackets must be present and secured. Security Screens intact and operable. If window guards are present, they must be secure and open properly in the event of emergencies.

Floor Tiles/Wood/Cove Base/Linoleum

No bulging/buckling/cracked tiles, no holes in floor, no evidence of rot or damage to sub-flooring, cove base securely attached to wall and not cracked. If linoleum is present, make sure it is intact and no tripping hazards present. No evidence of bulging of sub-floor. No evidence of water infiltration, mold or mildew.

Walls/Ceilings

Smooth surface, no flaking/peeling paint, no holes/cracks, no evidence of water damage, no mold/mildew, no buckling/bulging, no evidence of current leaks. Cove base/baseboard in tact. All surfaces painted.

Electrical – Outlet/Switch/Light/GFI

Light fixture operates, light globe in place and unbroken, switch plate intact, electrical switch operable/pull chain operable if present, outlets working, outlet covers intact. If GFI present, GFI operable and cover plate intact.

Call For Aid - Emergency Pull

(If applicable) pull cord/string/chain in place and hanging freely; call-for-aid operable

Plumbing – Lavatory Sink

No leaks at faucets, shut off valves or supply pipes. No leaks in drain or trap under sink. Drain runs freely. Adequate water pressure, hot and cold water. Sink secure to wall/counter, surface not unduly chipped or stained. Stopper available/working.

Plumbing - Toilet

Unbroken, no cracks, secure to floor and properly caulked, no evidence of leaks, flushes properly, no evidence of leaks when flushed, toilet seat is present, unbroken and secured to toilet bowl.

Plumbing - Tub

Caulking should be present at base of wall and top of tub and free from mold and mildew. Faucet is present and secure, no leaks around faucet, no dripping of water when in off position. Shower/tub diverter (if present) works properly (i.e., no water runs out of tub spout when shower is on and visa-versa). Hot and cold water comes out of shower at the same time. Surface intact, no cracking, minimal discoloration, ceramic tiles intact, caulking intact, ceramic tile walls not bulging. Drain runs freely. Stopper present and working.

Heating Unit - Heat Pipes/Pipe Covering/Thermostat

Heating unit is operable, no sign of water leaks, corrosion, charring or improper burning. If baseboard heat, covers should be in place and not blocked by furniture and no wires/extension cords resting on unit. No sharp edges on covers. All heat pipes in unit should have appropriate pipe covering. No abnormal vibration or noise from system, including from fan units. Thermostat operable and cover in place.

Ceramic Tile

No broken or loose tiles, grout and caulking in tact, no bulging of tiles or wall; wall soap dish (if present) secure and properly caulked/grouted.

Medicine Cabinet

Intact, secure to wall. Door opens, closes freely and stays closed. Shelves present and intact. Rust free/no corrosion. Mirror unbroken/cracked. If light fixture is attached to medicine cabinet globe/diffuser unbroken and attached, light operates, no evidence of rust/corrosion.

Accessories - Towel Rack/Cup Holder/Toothbrush Holder/Soap Dish/Toilet Paper Holder

All accessories, as applicable must be secure to wall and unbroken.

Ventilation/Exhaust/Ventilation Grill

There is an operable window or exhaust fan. Individual fans work when turned on. Rooftop systems are drawing air (indicated by paper placed against grill). Grill is intact and clean.

21.4.6 Living Room

Door & Hardware

Door should be present, no holes/damage and painted. Hardware should be intact and functioning, no tenant installed locks, hinges intact and functioning, door jamb, frame, header, lintel, trim and threshold intact and unbroken. Door closes easily and fully. Door is painted or varnished.

Floor Tiles/Wood/Cove Base/Linoleum

No bulging/buckling/cracked tiles, no holes in floor, no evidence of rot or damage to sub-flooring, cove base securely attached to wall and not cracked. If linoleum is present, make sure it is intact and no tripping hazards present. No evidence of bulging of sub-floor. No evidence of water infiltration, mold or mildew.

Walls/Ceilings

Smooth surface, no flaking/peeling paint, no holes/cracks, no evidence of water damage, no mold/mildew, no buckling/bulging, no evidence of current leaks. Cove base/baseboard in tact. All surfaces painted.

Electrical – Outlet/Switch/Light

Light fixture operates, light globe in place and unbroken, switch plate intact, electrical switch operable/pull chain operable if present, outlets working, outlet covers intact. If GFI present, GFI operable and cover plate intact.

Electrical – Breaker Panel

Breaker panel cannot be blocked by any appliance/furniture. Breaker panel is covered and cover is secure. Panel opens easily and no rust is present on cover/hinges. No evidence of water leaks, burning or charring, no exposed wires or open breaker ports.

Call For Aid - Emergency Pull

(If applicable) pull cord/string/chain in place and hanging freely; call for aid operable.

Closet Door/Shelf/Pole

Door present if intended to be there, undamaged, no holes, painted/stained, hardware intact, no damage to door frame/jamb. Shelf/pole present if intended, secure to wall/bracket.

Window - Frame/Sash/Glass/Screen/Shades/Window Guards

If apartment is third floor or below, window may be considered an egress and must not be blocked by furniture, air conditioners (unless an exception has been allowed and is documented for a resident's health reasons), or security bars. Windows must open and close easily and stay in open position. Locks must work. Window frame should be in good condition, rust free, paint intact, no peeling paint on sill or frame, no evidence of water leakage. Glass is present and unbroken, seal intact, no fogging. Screen present, unbroken and operational. Shades are installed at turn over only and brackets must be present and secured. Security Screens intact and operable. If window guards are present, they must be secure and open properly in the event of emergencies

Heating Unit - Heat Pipes/Pipe Covering/Thermostat

Heating unit is operable, no sign of water leaks, corrosion, charring or improper burning. If baseboard heat, covers should be in place and not blocked by furniture and no wires/extension cords resting on unit. No sharp edges on covers. All heat pipes in unit should have appropriate pipe covering. No abnormal vibration or noise from system, including from fan units. Thermostat operable and cover in place.

21.4.7 Bedroom(s)

Door & Hardware

Door should be present, no holes/damage and painted. Hardware should be intact and functioning, no tenant installed locks, hinges intact and functioning, door jamb, frame, header, lintel, trim and threshold intact and unbroken. Door closes easily and fully. Door is painted or varnished.

Floor Tiles/Wood/Cove Base/Linoleum

No bulging/buckling/cracked tiles, no holes in floor, no evidence of rot or damage to sub-flooring, cove base securely attached to wall and not cracked. If linoleum is present, make sure it is intact and no tripping hazards present. No evidence of bulging of sub-floor. No evidence of water infiltration, mold or mildew.

Walls/Ceilings

Smooth surface, no flaking/peeling paint, no holes/cracks, no evidence of water damage, no mold/mildew, no buckling/bulging, no evidence of current leaks. Cove base/baseboard in tact. All surfaces painted.

Electrical – Outlet/Switch/Light

Light fixture operates, light globe in place and unbroken, switch plate intact, electrical switch operable/pull chain operable if present, outlets working, outlet covers intact.

Call For Aid - Emergency Pull

(If applicable) pull cord/string/chain in place and hanging freely; call for aid operable.

Closet Door/Shelf/Pole

Door present if intended to be there, undamaged, no holes, painted/stained, hardware intact, no damage to door frame/jamb. Shelf/pole present if intended, secure to wall/bracket.

Window - Frame/Sash/Glass/Screen/Shades/Window Guards

If apartment is third floor or below, window may be considered an egress and must not be blocked by furniture, air conditioners (unless an exception has been allowed and is documented for a resident's health reasons), or security bars. Windows must open and close easily and stay in open position. Locks must work. Window frame should be in good condition, rust free, paint intact, no peeling paint on sill or frame, no evidence of water leakage. Glass is present and unbroken, seal intact, no fogging. Screen present, unbroken and operational. Shades are installed at turn over only and brackets must be present and secured. Security Screens intact and operable. If window guards are present, they must be secure and open properly in the event of emergencies

Heating Unit - Heat Pipes/Pipe Covering/Thermostat

Heating unit is operable, no sign of water leaks, corrosion, charring or improper burning. If baseboard heat, covers should be in place and not blocked by furniture and no wires/extension cords resting on unit. No

sharp edges on covers. All heat pipes in unit should have appropriate pipe covering. No abnormal vibration or noise from system, including from fan units. Thermostat operable and cover in place.

21.5 Resident Caused Maintenance Issues

In the course of apartment inspections, management staff will enter apartments that have problems with sanitation, clutter, or other maintenance related issues caused by the resident. In all such cases, an occupant citation must be issued to the resident for the problem to be corrected and a follow up inspection time set by management.

Occupant citations may be issued for housekeeping, clutter in the unit, fire hazards, storage of flammable materials; storage of items in common areas, tripping hazards, blocked egress, use of basements for dwelling purposes, and other issues. The occupant citation is incorporated into the fourth page of the inspection form and must be completed at the time of the inspection.

One copy of the Citation is to be left with the resident at the time of the inspection, or left in an obvious location if the resident is not home. The citation must clearly state the nature of the problem and the actions the resident must take to correct it. It must provide an adequate time frame for the resident to correct the conditions, depending on the nature and severity of the issue.

Maintain a copy of the citation in a tickler file. Take the copy to the re-inspection on the date specified. If the resident has not complied with the citation, lease enforcement action must be initiated, although management may wish to refer the resident to social or medical services at the same time.

A copy of the citation, with follow up actions and notes as to progress by the resident in correcting the conditions, must be kept in the tenant file.

21.6 Scheduling Apartment Inspections – “Perform LUI” Work Orders

As a general rule, each Development must complete 1/10th of their total number of units each month in order to complete the LUI'S on the 10-month cycle of April 1st to January 30th. Managers may alter this schedule and perform LUIS differently as long as all LUIs are completed each year between April 1st and January 30th.

A “perform LUI” work order is issued for each unit to be inspected in accordance with the 10% per month rule, or in accordance with the schedule provided by the manager. When the inspection is complete, management staff shall complete the work order by indicating the date completed, the amount of time involved in the inspection, and their employee ID number.

“Perform LUI” work orders shall also be used to record work completed in the “Inspect and Repair” program as discussed in Chapter 22.

21.7 Notification to Residents

Under the lease, all residents must receive a forty-eight hour notice prior to management entering the apartment (except in emergencies). To accomplish this, notification must be given to each resident in writing (and a copies kept in the tenant file or other central location) five days prior to the inspection. If using first class mail, the notice must be prepared and mailed seven days prior to the scheduled inspection date. If hand delivered, the notice should be delivered five days prior to the inspection. If hand-delivered, the notice must be placed fully under the door for all residents not at home. This notice should include standard 48-hour notice language, referencing the lease.

Assuming appropriate 48-hour notice has been given, BHA staff shall enter all apartments where residents are not home using keys kept in Management Office. In the event that the key does not work, the lock may be changed and the resident charged for the change.

In the event that management can not enter the apartment due to the actual refusal of the resident, the presence of a dog, or other reason, the resident must be called in to a private conference and, if necessary, eviction action should begin.

21.8 Apartment Inspection Form

The inspection form consists of four pages. The first three pages are plain paper and the fourth page is on three-part NCR paper.

Page One: Basic tenant, unit and inspection information, instructions and comment space

Page Two: Room by room deficiency checklists - Health and Safety, Entry door, foyer, miscellaneous, kitchen and bathroom

Page Three: Room by room deficiency checklists – Living Room and Bedrooms

Page Four: Three part NCR form to list work orders being issued and issue tenant citation, if needed.

Inspection form packages must be put together in advance of each inspection, indicating all of the basic information on the first page, with Development and unit # on each other page. The date may be inserted in advance or at the time of the inspection.

Each item on the check list sheets should receive an entry as one of the following:

Check mark = No deficiency

N/A = Not Applicable

OD = Observable Deficiency

DHW Temp = actual temperature of hot water taken at kitchen sink

While conducting the inspection, check the resident's phone number and ask whether or not management has "permission to enter" to complete the repairs.

Forms must be completed in blue or black ink. No pencil or white out can be used on forms.

For apartments with living rooms and dining rooms, use the living room section for both rooms.

Indicate a bedroom # or description in the space provided (i.e. master bedroom, boys room, etc).

The resident must sign the last page if they are home.

A copy of the last page must be left with the resident or in an obvious location in the apartment if the resident is not home.

21.9 What you will need to conduct the Inspection

You will need to bring the following items with you to conduct the inspection:

- Prepared LUI Inspection form/four pages
- "Perform LUI" work order
- Clip board to hold LUI Inspection forms.
- Hot water thermometer for temperature checks.

- Digital thermometer for heat checks.
- Flash light
- Pointer to reach and test smoke detectors
- Kitchen and bathroom sink stoppers
- Small night light to test outlets or proximity tester
- Keys to each unit scheduled for inspection to make sure they work, or enter the apartment if the resident is not home.
- Employee ID Badge
- Resident Mold/Mildew Information sheet in the event for use if a resident has signs of mold or mildew growth in the apartment

If you decide to use the “Inspect and Repair” program, the mechanic will also need to bring tools and supplies. See Chapter 22 for more information.

21.10 Conducting the Inspection

The apartment inspection form must be used to perform all unit inspections.

It is essential to be thorough in completing all inspections. While it is good to discuss needed repairs with the resident and ask the resident about any problems he or she may have with the apartment, this will not substitute for a thorough inspection of all components of the apartment. It is very important that the items listed below be actively checked (i.e. running the water, turning on the stove, opening the refrigerator, opening and closing windows, etc) and that all keys be tested while conducting each inspection.

Inspectors must perform at least the following activities while in the apartment:

- Check entry door locks with the key to insure keys work
- Test intercoms; may require two staff
- Hit smoke detector test buttons
- Open and check the interior of all panel boxes to insure there are no exposed wires, open breaker ports, or other hazards
- Switch on all lights and fans
- Switch on stove burners, oven and broilers
- Check all outlets with small night light or proximity tester to insure they work
- Check all GFIS by plugging in night light, hitting test button to see if light goes off, then hitting the reset button. A proximity tester will work for this purpose as well.
- Test call-for-aid devices to determine they work properly (may require two staff)
- Turn on faucets to determine adequate water pressure
- Test hot water in the kitchen with a thermometer and record the temperature on the form
- Look under sinks while water is running to check for leaks
- Make sure the drains run freely by filling sinks half way then pulling the stopper
- Flush all toilets
- Open and close all windows, check to insure all window locks work, and open and close all doors
- Open entry and fire doors half way, let go to see if door closes and latches on its own
- Look inside the refrigerator; check the gaskets, check the freezer to see if food is fully frozen and it is not overly full of ice
- Check inside cabinets and behind appliances for signs of pest infestation
- Open and close cabinet drawers and doors
- Check for need of window guards (talk to resident)
- Weather permitting, test thermostats
- Where possible, check washing machine shut off valve by turning on washing machine and shutting off valve to insure that water shuts off; while running washer, also check for leaks at connections

Discuss with the resident any concerns you may have, including:

- Alterations to the unit
- Housekeeping
- Clutter
- Infestation issues
- Proper ventilation of unit to prevent mold/mildew (use Mold Mildew Info sheet)
- Use of basements as living space
- Use of laundry area shut off valve whenever washing machine is not in use
- Child window guards
- Operation of call-for-aid and door bells/intercom
- Dryer ventilation and cleaning of dryer filters
- Damage to smoke detectors
- Other concerns

Issues discussed with residents may or may not rise to the level of a citation or other lease enforcement action.

21.11 Record Keeping

After the inspection is completed, create work orders for all repairs needed, except those which were performed at the same time as the inspection, which will be recorded on the "Perform LUI" work order. Record the work order number for each item on the last page of the inspection form. If there were no deficiencies, record the date of the inspection properly on the CCS system.

The following makes up the record of a living unit inspection:

- Perform LUI Inspection work order, including any work completed by the mechanic, once entered as completed in the CCS system.
- Inspection form checklists (first three pages)
- White copy of the last page of the inspection forms once work orders have been entered and the numbers written on the form or a no deficiency LUI date has been recorded in CCS.

All of these should be stapled together, with the work order on top, and filed in unit order in the current year's Apartment Inspection notebook or binder. The binder must also include a unit matrix grid with each unit shaded or checked off when the inspection is complete.

When the LUI is completed, the pink copy is given to the resident or left in an obvious place, in the unit for the resident, i.e. the kitchen table.

The pink copy of the last page is maintained in a tickler file for re-inspection of units with tenant citations. Once completed, and for all cases with no citation, the pink copy is filed in the work order as part of the unit history.

21.12 Quality Control

In order to insure that apartment inspections and the Inspect and Repair program are being carried out properly, Assistant Directors and Program Maintenance Supervisors, along with other supervisor staff, shall review of paperwork and randomly check apartments inspected.

In order to accomplish this, the Work Order Center shall review completed "Perform LUI" work orders each month and randomly select 5% of the units for review, on a schedule to be determined by the Building Services Department. Each site shall participate in a quality control review at least quarterly from June of 2004 through May of 2005 and at least annually thereafter.

At the review, the Assistant Director, Program Maintenance Supervisor, or other Operations or Building Maintenance Supervisory staff person shall review all of the paperwork for accurate completion and shall re-inspect the apartments for which work orders were written. Such work orders shall be coded 4113 for Inspection, and shall have the description "Quality Control Inspection" under work required.

Supervisors will follow up with individual site staff to make corrections as required. Quality control inspection reports shall be provided to the Director of Building Services within a week of each quality control review.

21.13 Appendices to this Chapter

Appendices to this Chapter can be obtained on the Fam/Eld S:Drive in the folder labeled **SOP Appendices**, in the sub-folder labeled **Chapter 21 – LUIs**. **Note:** appendices are subject to addition and change at any time.

Chapter 22 Completing LUI Work Orders

22.1 Approaching the work

It is required that all LUI work orders be completed within 20 days of the inspection. To do this, workers need to be scheduled as efficiently as possible. Developments may use one of two approaches, or a combination of both approaches, to complete the work created by Living Unit Inspections. At least one of these approaches must be used.

- Inspect and Repair Program: A mechanic accompanies the management staff while they perform the inspections and corrects as many small problems as possible on the same day.
- Crew Management Program: LUIs are completed, work orders entered, and a crew of workers is assigned to complete the work within the next week to two weeks.

22.2 Inspect and Repair Program

During the inspection, certain items may be recorded as deficiencies that can be completed immediately by a mechanic. A mechanic may be assigned to each inspector and be available to start repairs at the same time that the first unit is inspected. He/she should be equipped with at least the items listed below. Developments shall determine how to manage the supply of tools and materials in the most efficient manner. The mechanic shall follow the inspectors to each unit to make these repairs. Each of these repairs shall be recorded on the fourth page of the inspection form along with the work order number for the "Perform LUI" work order.

22.2.1 Recording the Repairs

When the inspection is completed, the manager shall note each of the items the mechanic is to perform that day on the "Perform LUI" work order issued for that apartment. As the work is completed, the mechanic shall complete the Perform LUI work order for each item done, by indicating the work order code, the time involved, and their employee id number on the work order. The work order completion information must also include the date and time involved in the actual inspection, the work order code for "perform LUI", and the inspector's employee ID number.

22.2.2 Determining work to include in the Program

The time that a mechanic spends in an apartment needs to be roughly the same as the time it takes to inspect an apartment in order for all the work to be accomplished in the same day. Inspectors and mechanics will need to work together to determine how much work can be accomplished. Because there will not be an even load of work required in each apartment, judgments will have to be made as the inspections progress depending on the work load involved. In some cases, the mechanic may be able to accomplish the work on the list and some other tasks; in some cases, some work orders may need to be deferred to another day due to an overload of work. Judgment will be required to sort this out during each day of inspections.

Each development will have a different set of work items, which are practical to be completed during the Inspect and Repair Program.

The following list is suggested, but each development which uses this approach needs to develop its own customized list:

- Replacement of all smoke detector batteries
- Replacement of battery operated smoke detectors as needed
- Installation of temporary battery operated smoke detectors where needed due to hard wired smoke detector failure (with a follow up work order recorded for replacement of the hard wired smoke detector)
- Replacement of switch plates and outlet covers as needed
- Replacement of Call for Aid string/chain as needed
- Replacement of Light covers/lenses (optional by development)
- Replacement/tightening of faucet aerators and shower heads
- Patching of small holes in walls, not larger than 4" in diameter (optional by development)
- Any small repair such as securing hinges, shade brackets, etc., that can be accomplished quickly
- Replacement of cabinet/drawer pulls
- Replace missing range hood filters
- Install breaker blanks
- Tighten loose toilet seats

22.2.3 Tools and Supplies

The mechanic will need to bring tools and supplies necessary to complete the work. The suggested list follows, but each development needs to create its own customized list:

- Basic tools – hammer, screwdrivers and/or drill with screw bits, pliers, adjustable wrench
- Small step ladder
- 9V batteries for smoke detectors (replace all at annual inspections)
- Battery operated smoke detectors
- Switch plates and outlet covers
- Screw driver and/or drill with screw bits
- Call for Aid string/chain
- Cabinet/Drawer pulls where applicable
- Range hood filters
- Breaker panel blanks
- Light covers (optional by development)
- Aerators
- Shower heads
- Appropriate sized wrench for changing aerators/shower heads
- Teflon tape for shower heads
- Fast drying patching plaster & 1" and 3" spackling tools/putty knives (optional by development)

22.3 Crew Management Approach

The Crew Management Approach can be used instead of or in addition to, the Inspect and Repair Program. Developments must use at least one of these two approaches to completing LUI work orders.

The Crew Management Approach involves grouping all LUI work orders and dispatching staff to complete these work orders at more or less the same time. The make up and timing of the crew work will depend upon the development, other priorities and work required. Crew work may be organized at the development level, but for smaller developments, should be organized by Program. Staff assigned to LUI work, should focus on LUI work orders and other routine work in the apartments assigned, and not be subject to being pulled off for emergency response. By focusing on LUI work, work will be concentrated in one geographical

location and the time involved in delivery of stock and traveling between units is minimized. It also allows supervisors to easily provide quality control supervision.

Generally, the work should be scheduled for no later than one week following the LUI completion.

22.4 Appendices to this Chapter

Appendices to this Chapter can be obtained on the Fam/Eld S:Drive in the folder labeled **SOP Appendices**, in the sub-folder labeled **Chapter 22 – Inspect & Repair**. **Note:** appendices are subject to addition and change at any time.

PART FOUR: PREVENTIVE MAINTENANCE

Chapter 23 Introduction to Preventive Maintenance

This part of the SOP manual contains the policies and procedures for preventive maintenance for the Boston Housing Authority's Family and Elderly Developments. Each of the sections provide information on the exact procedures, record keeping, activity cycles, and lines of responsibility for each building system or component covered by this policy.

The preventive maintenance program serves multiple purposes such as reducing repairs, repair costs, and loss of service to residents. The program prolongs the life of buildings, systems and structures. When preventive maintenance activities are performed correctly, we improve customer service and eliminate major breakdowns that create inconvenience to residents. Performance of preventive maintenance tasks is completed by site staff, central staff and contractors, depending upon the system or task.

23.1 Defining the Terms

Preventive maintenance is the term used to describe maintenance activities which, when performed consistently and correctly, help to prevent breakdowns and extend the life of building features, equipment and systems. These activities can be categorized in a hierarchy as follows:

Inspection – Testing – Cleaning – Serving – Repair – Replacement

23.1.1 Inspection

Inspection is an integral part of any preventive maintenance program. Inspection includes casual observation in the course of the day by BHA staff and residents through which deficiencies can be reported and corrected as well as formal inspections on a regular basis of all building components and systems. Most of the inspections called for in this manual will be performed by BHA staff (Managers, Laborers, Groundskeepers, Resident Custodians and Superintendents); others will be performed by trained technical staff such as electricians, fire extinguisher contractors, and others. Inspections pick up problems on a regular basis and report them for correction before they become larger problems.

23.1.2 Testing

In general, testing is performed as a method to determine whether or not an item is working correctly. The most significant testing is performed by the fire alarm contractor who tests every "device" (smoke detectors, pull stations, sprinkler heads, etc.) every year. Other testing includes checking the generator weekly to make sure it runs, testing boilers prior to the start of the heating system, and so forth

23.1.3 Cleaning

While cleaning may not be considered a part of preventive maintenance, it is critical to the operation of many systems. It includes regular cleaning of elevator tracks to prevent the build up of debris, regular cleaning of carpets to prevent deterioration from dirt particles, regular cleaning, stripping and waxing of VCT flooring to lengthen the life of such surfaces, and regular wipe downs of all equipment after every use. It also includes cleaning of boiler fire chambers, cleaning of oil supply nozzles, and other more technical cleaning tasks which may require special training.

23.1.4 Service

Service includes such work as lubrication, changing filters, changing belts, changing oil, etc. on equipment. Small equipment such as lawnmowers and snow throwers should be serviced at least annually. Generators should be serviced quarterly. Heating systems must be serviced at various levels as frequently as daily; other service can be performed weekly, monthly, quarterly or annually. Tasks involved in service are very specific ("lubricate burner motor," "adjust hoses and belts," "replace oil lube filter"). These specific tasks are detailed on each of the service checklist forms, which will be found for various equipment and systems in this manual. All service requires some training; most service must be done by appropriate trained personnel on the BHA staff or by contractors.

23.1.5 Repair

Repairs are made either as the result of an inspection, testing or service activity which identified a repair need, or when an item suddenly becomes dysfunctional. In general, preventive maintenance activities are performed both to prevent the need for repair and to identify repairs needed before they reach the point that they cause a complete malfunction. Some repairs are actually replacements but are usually considered a repair if the item being replaced is a minor component of the system. For instance, a belt might break and cause a malfunction; you will replace the belt, and this is considered a repair to the overall equipment.

23.1.6 Replacement

Replacement of an entire system or component should only occur when the system has met or exceeded its useful life. A roof, for instance, should last between 20 and 30 years. While you might need to make repairs to the roof after 10 or 15 years, a properly cared for roof should not need to be replaced until the 20 or 25 year point. The same applies to a variety of building systems. Very frequently, well cared for building systems can last well beyond their anticipated useful life.

23.2 Defining the Expectations

The Manager of each development is responsible for insuring that all preventive maintenance activities are carried out on schedule and properly recorded. Most of the work of supervising preventive maintenance in Family Developments is delegated by the manager to the Maintenance Superintendent. In addition, the BHA's service programs coordinator handles preventive maintenance on a variety of highly technical systems, such as elevators and fire alarms, and the heating systems coordinator supervises much of the work required on large heating systems. The following lists more specifically these responsibilities:

23.2.1 Development Management and Maintenance Staff

(Includes tasks performed by managers, maintenance superintendents, laborers, groundskeepers as well as work performed by contractors under the supervision and direction of the manager)

- Boiler room Inspections
- Annual replacement of Whalen Unit filters
- Daily/Weekly walk through inspections
- Quarterly Building and Grounds Inspections
- Monthly test of emergency lighting systems
- Weekly inspection of generator
- Annual testing and servicing of fire extinguishers
- Annual replacement of batteries in battery operated smoke detectors
- Annual or more frequent preventive clearing of main drain systems
- Annual steam cleaning of trash chutes
- Annual replacement and/or cleaning of window A/C filters
- Weekly/Quarterly inspection of roof and roof fans

- Annual clearing of main vertical and horizontal drains
- Regular cleaning of gutters and down spouts
- Regular care of trash compactors
- Annual service of small engine equipment (i.e. lawn mowers and snow blowers)
- Regular cleaning of elevators and tracks

23.2.2 Heating Plant Staff

- Weekly inspection and service of boiler Rooms
- Annual cleaning and state inspections of boilers
- Regular service on burners and other boiler components

23.2.3 Service Program Coordinator

- Monthly elevator service
- Annual elevator inspections
- Quarterly testing of fire alarm systems
- Annual testing of back flow preventers
- Quarterly & annual service to generators
- Steel Skid Loader Service Three Times per Year
- Annual testing of sprinklers & fire pumps
- Management of Roofing Repair Crew
- Quarterly inspections of all BHA Fleet Vehicles
- Annual Dumpster surveys

23.2.4 Construction and Repair Division

Replacement of major building systems and equipment

23.3 Tracking and Reporting

Critical to the completion of preventive maintenance work is maintaining accurate and complete records of all work completed.

23.3.1 Record Keeping

Establish an **Annual Service Record Book, usually a loose-leaf binder**. Managers will establish a service record binder for each fiscal year. In the event that the material is too voluminous to be contained in one book, managers may decide to keep certain materials - such as weekly reports (B&G walk-through short-forms, IPM service records etc) - in separate notebooks or files, noting in the primary notebook where to find this material.

The Service Record Books will contain all records of Preventive Maintenance performed during the year by in-house staff or by contractors. It will also include call-back service slips for items such as elevators and alarm systems. Follow the instructions in each chapter under record keeping to determine what should be in each section. Establish a section for each type of system or structure at the development.

The Service Record Binder will also contain all reports of flush out extermination.

All materials required should be filed in this book as they occur. All records must be complete no later than **April 10** of each year.

The **Work Order System** at each development will be used to maintain records of all work performed by in-house staff on the systems referred to in this manual as well as all other repair work occurring at the development. All preventive maintenance (P) work orders shall be filed in the Annual Service Record binder as well as in the work order system files.

The **purchase order filing system** shall include copies of all purchase orders, etc. and shall act as a back up filing system if necessary for preventive maintenance.

Instructions for filing of specific information is found in the Policies and Procedures sections of each of the building systems addressed in this manual.

23.3.2 Annual Schedule of Activities

As a final step in preventive maintenance planning, an annual schedule of activities will be prepared for each development. Throughout this Manual, this form is referred to as the Annual PM Plan – Schedule and Report Form. This schedule will detail out daily, weekly, monthly, quarterly and annual maintenance activities for easy reference and manager planning. The format for this schedule is contained in the SOP Master Building Systems Appendices on the S: FamEld Drive, and is a combined schedule/reporting form. The annual landscape maintenance plan, snow removal plan and annual pest management plan supplement building systems preventive maintenance plans. These plans should be maintained in the Building Systems Inventory Binder and up-dated each year.

23.3.3 Reporting

Managers will report on all preventive maintenance activities to their Regional Managers or Assistant Director of Property Management on a monthly basis. This report shall indicate the annual plan of activities and report, on a cumulative basis, what work has actually been accomplished. The report format is available in the SOP Master Building Systems Appendices on the S: FamEld Drive (same as schedule referenced above). Each development shall set up the report at the beginning of the fiscal year, based on the site's systems and schedule of activities, and report out monthly on completion of activities planned.

Chapter 24 Development Systems Inventory, Work Stations, Schedules and Service Records

24.1 Creating A Development Profile and Systems Inventory (Systems Inventory Book)

In order to properly maintain its systems and structures, a development staff needs to know what they have. Thus each development needs a Development Profile and Systems Inventory notebook or binder (referred to as the Systems Inventory Book throughout this manual). This book shall be updated each time there is a change in the system through a capital replacement or repair project, purchase of new equipment or vehicles, or major operations upgrade project.

Each Systems Inventory book shall contain detailed information on all of its structures and systems including sections on the following items, as applicable to each development:

- Site & Floor Plans, including number of buildings and units, types of units
- Annual Preventive Maintenance Plan Schedules and report forms, including Preventive on building systems, pest management, snow removal and landscape care
- Record of Capital Improvements
- Inventory, specification sheets, and service checklist forms for the following systems:
 - Electrical systems
 - Exterior and Interior common area lighting
 - Elevators
 - Fire Safety Systems
 - Generators
 - Heating Systems and all components
 - Plumbing Systems including domestic hot water
 - Roofs
 - Equipment and Vehicles
 - Trash Chutes and Compactors
 - Ventilation and Air Conditioning Systems

Inventory and Specification sheets shall include detailed information on the location, age of the system and components, replacement parts, warranty information etc as applicable and specific scheduled preventive maintenance procedures to be conducted on each system. What is to be included in each section is described in each of the following chapters of this manual. Sample Master System Inventory, Specification and Checklist forms are contained in the SOP Master Building Systems Appendices on the S: FamEld Drive. These forms will need to be customized for the actual systems and components in your Development.

Many Developments may already have a *Profile and System Inventory* notebook created for the systems and components at their sites. This data may need to be reviewed and updated. Technical Staff from the Building Services Department are currently working on revising and updating Authority-wide system inventory and specification information and may be able to provide you with assistance on creating or updating a *Systems Inventory Book* for the systems at your Development.

Our goal is to format a *Development Profile and Building System folder* on the Fam/Eld S:Drive for every Development. These folders will contain inventory, specifications and warranty information etc specific to each building structure, system and component at each Development. This initiative is a *work-in-progress*. The Building Services Department's Technical staff will be working with you on this initiative. As the information is gathered, it will be formatted and saved on the Fam/Eld S:Drive in the folder labeled **SOP Profile and Bldg. Systems by Development**.

The **SOP Profile and Bldg. Systems by Development** folder will be divided into sub-folders that correspond to each Development e.g. Charlestown's sub-folder will be labeled **101- Charlestown Profile and Bldg. Sys.** Each Development sub-folder will be further sub-divided into folders for each Building System/component/structure etc subject to preventive maintenance and organized the same way as the sub-folders in the SOP Master Building Systems Appendices folder.

24.2 Creating a PM work station

Each superintendent shall have constructed an appropriate work station for maintaining all checklists and schedules for in-house staff to complete. This work station must consist of a bulletin board on which systems information is maintained, a sample of each type of checklist is maintained, and clip boards containing all of the checklist forms which are regularly used, such as for generators, heating systems and so forth. Items used only annually do not need to be included at the work station. The work station will also include a protected (framed or laminated) copy of the annual PM schedule.

Developments may need to create more than one PM work station depending on the location of various equipment and on who is assigned to maintain it. For instance, it probably makes sense to have the boiler room PM information in the boiler room and all other information in the maintenance office.

24.3 Creating an Annual Preventive Maintenance Plan

As a final step in preventive maintenance planning, an annual calendar of activities will be prepared for each development. This schedule will detail out daily and weekly activities, and schedule out all annual maintenance tasks for easy reference and manager planning.

Based on Preventive Maintenance Task Frequency and seasonally related work, the Maintenance Superintendent shall schedule all activities required on an annual basis. For instance, quarterly service of generators might take place during the first week of April, July, October and January. Annual inspection and service of extinguishers might be done in October. Boiler cleaning might be done in July. The Heating Systems Coordinator will be involved in assisting to schedule out heating related systems maintenance and the Service Systems Coordinator will assist with fire alarm maintenance, elevator maintenance and other items. The Garage staff will schedule preventive maintenance on all trucks.

Forms and procedures for producing this plan have been developed and are located in the SOP Master Building Systems Appendices on the S: FamEld Drive

24.4 Maintenance of Service Records

Each development shall maintain a complete record of all preventive maintenance services performed on an annual, fiscal year basis (April 1 through March 31). This shall be set up as a loose-leaf binder divided into sections for each category of preventive maintenance, pest management, Building and Grounds Quarterly Inspections and landscape care completed at the development. This is referred to in this manual as the "Annual Service Record Binder or Book." Copies of all inspections, service records, and repair records shall be maintained in this binder for all systems and structures subject to preventive maintenance. Those areas, such as building and grounds walk-through short-form inspections and daily fireman log sheets, which create voluminous amounts of paper, may be set up in separate binders or files, in chronological order, starting over each April 1.

The following chapters describe, at the end of each system or structure defined, what records must be maintained in the Annual Service Record Binder or Book. Records may include inspection reports, service records from contractors, service checklists from staff, and repair records, both from contractors and staff (i.e. work orders).

Chapter 25 General Standards for Maintenance of Mechanical spaces

This chapter is included as a supplement to the information found in each of the building systems chapters that follow. This chapter deals with the responsibility of site staff to maintain the spaces that mechanical equipment is housed in.

Standard: All boiler rooms and other mechanical spaces shall be maintained securely, cleanly, litter and debris free, and well lit at all times. Areas should be painted wherever practical in order to achieve a high level of cleanliness.

25.1 Boiler Rooms

It is the responsibility of site staff – managers and maintenance superintendents – to insure that boiler rooms are maintained properly at all times. These tasks are the responsibility of the Fireman. Boiler rooms must be:

- Able to be locked and properly secured whenever no one is in it
- Have no broken windows
- Be properly and completely lit at all times
- Be free of debris and dirt at all times
- Be free of storage (do not use boiler rooms as storage areas)
- Have organized shop areas, if any
- No furniture except desk and desk chair. No TV's
- Have clean desk areas, if any
- Have clean bathrooms, if any
- Have a painted floor (repaint at least annually with heavy duty deck paint)
- Have walls painted at least 8 feet high (repaint at least every two years)
- Have working eye wash stations (if using disposable stations monitor expiration date for washing solution and replace as needed.)
- Have working and well located fire extinguishers, serviced annually
- Have working door, burner and flood alarm systems
- Be free of any safety hazards (mark or paint all low pipes)
- Have Burn kits and First Aid kits maintained and up to date
- Have spill kits and barrels (in oil fired boiler rooms)

25.2 Interior transformer areas

All interior transformer areas must be in rooms, which can be locked and are maintained in a locked state at all times, free of clutter and debris. Treat any leaks as hazardous and report to Building Services immediately.

25.3 Transformers: (exterior)

Some transformers are located outside, in enclosed fenced in areas. These fences must be securely locked at all times and the areas inside the fence clear of debris, weeds and shrubbery. If transformer is not enclosed it should be clean and free of clutter, shrubs trimmed.

25.4 Dispersed boilers/hot water heater areas of basements or rooms

If these items are in rooms, they should be kept locked at all times. Each such room should be on the same key for ease of maintenance. Some of these items may not be in separate rooms, increasing the need to insure that the basement itself is secure. The areas around this equipment should be clean and free of debris. It is helpful to paint the floor area around the equipment or if in a separate room, to paint both walls (to 8 feet) and floors. All such areas must be clearly lit at all times.

25.5 Primary and Secondary Electrical Panels

If main electric panels are in separate rooms, the rooms must be locked at all time. If not, it is critical to keep the basement locked at all times. All panels must be kept covered at all times, and locked. No storage is permitted near electrical panels and access to electrical panels must be free at all times.

25.6 Generators

If generators are in separate rooms, the rooms must be locked at all time. If not, it is critical to keep the basement locked at all times. No storage is permitted near generators. Generator rooms must be painted and kept free of debris and dirt at all times.

Some generators are located outside, in enclosed fenced in areas. These fences must be securely locked at all times and the area inside the fence free of debris, weeds and shrubbery.

25.7 Condensate return units

Condensate return units are generally in open areas of basements. Insure that lighting is available at all times at the unit. Maintain the areas free of debris and dirt. Keep spare pumps and motors on hand.

25.8 Sump pumps

Sump pumps will be located in a variety of locations including boiler rooms and basements. Keep spares on hand. You should have 2 that are operational and a spare. Insure that no debris is in the sump pump pit and that sump pump areas are well lit.

25.9 Cable and phone junction boxes

Cable and phone junction boxes are generally located in basements but may also be in back stairwells of some developments. These boxes should be covered and locked at all times. This is the responsibility of the phone and cable companies.

25.10 Maintenance Shops & Offices

- Clean; organized; free of clutter
- Rest room clean, operational
- Doors secure; locks functional
- Floors and walls painted
- Adequate lighting
- Proper storage of flammable materials
- Floors and walls painted
- Appropriate furniture
- Lunch area for staff including table, chairs, refrigerator, microwave, sink (if possible) and lockers

25.11 Responsibility for Maintaining Standards

It is the responsibility of site staff to insure that all of the above standards are met. Day shift firemen are primarily responsible for boiler room maintenance items under the supervision of the site superintendent. Supervisory staff from the Building Services Division will perform regular inspections and assist in supervision, but the primarily responsibility for meeting these standards is the site superintendent's.

Similarly, the site superintendent is responsible for maintenance of all other mechanical spaces. Laborers and janitor/groundskeepers generally carry out the work, though tradesmen should be asked to conduct regular PM inspections and electricians and painters may be needed to conduct certain other tasks related to these spaces.

25.12 Responsibility for Materials, Supplies and Parts

It is the Site Superintendent's and Manager's responsibility to provide all necessary materials, tools, supplies and replacement parts needed to maintain boiler rooms and all equipment. Firemen or Building Services staff may make requests for such items, but orders shall be placed and managed by site staff.

25.13 Dealing with Oil Spills and Chemicals

Developments that use oil must purchase a 20-gallon Spill Pack Kit. This kit contains what you would need if there were an oil spill in the Boiler room.

All oil spills must be entered in the logbook and noted how the spill was cleaned up. It must be reported to the Heating Plant Coordinator, Manager and Maintenance Superintendent immediately.

Spill Pack Kits can be purchased through the Grainger catalog or at any oil supply company.

Chapter 26 Electrical systems and Exterior/common area lighting

26.1 Electrical Distribution System

26.1.1 Objective:

To insure the continuous provision of electricity to the development

26.1.2 Scheduled Activities

Annually:

Manager/Maintenance Superintendent Responsibilities:

Once a year, the Manager shall arrange for an in-house Electrician to perform a general inspection of the electrical distribution system. The electrician shall record on a site-map the location of all main service panels and the specifications for each unit. Based on this list, the Manager shall include stock requirements in their stock inventory system for the development.

Electrician

Annually, the Electrician shall perform a general inspection of the electrical system including, but not limited to:

1. Pulling the main circuit boards
2. Checking all circuit breakers and breaker boxes
3. Checking all main feeders
4. Tightening all lugs

26.1.3 Systems Inventory Information

An Electrical Distribution Systems Inventory and Specification sheet, including location and replacement part information, shall be maintained in the Systems Inventory Book and updated as needed. A site plan of all main service panel locations will be used to supplement this information and will be maintained in the Systems Inventory book. The Inventory shall also include a master checklist for inspections and services specific to the system at the site, as applicable. See S: FamEld Drive, SOP Master Building Systems Appendices for sample master Electrical Distribution Systems inventory, specification and checklists forms.

26.1.4 Service Records

Records of the Electrical Distribution preventive maintenance activities including all inspection and service checklists, repairs etc will be filed in the annual Service Record Binder in the Electrical Section.

All preventive maintenance activities must be included and tracked on your Annual Preventive Maintenance Plan – Schedule and Report form See S: FamEld Drive, SOP Master Building Systems Appendices for sample Annual PM Plan – Schedule and Report Form.

26.2 Battery Pack Emergency Lighting Systems

26.2.1 Objective:

To insure that all battery pack emergency lighting systems are in good working order in the event of an electrical shut down.

26.2.2 Scheduled Activities

Daily/Weekly

Laborer/Groundskeeper/Custodian Responsibilities:

During the course of daily work, the Laborer/Groundskeeper/Custodian should note any obvious breakage of the emergency lighting system and report such breakage immediately.

Monthly

Manager/Maintenance Superintendent's Responsibilities:

Once a month, the Manager/Maintenance Superintendent shall test the emergency lighting system by pressing the test button, then observing all lights to determine that they come on. If it indicates 'low charge' the battery must be changed.

Quarterly

Manager/ Maintenance Superintendent's Responsibilities:

To conduct a formal inspection of the building exterior for each unique building address. Note any breakage/defect of the emergency lighting system. Test the emergency lighting system by pressing the test button, then observing all lights to determine that they come on. If it indicates 'low charge' the battery must be changed. All deficiencies found during any inspection shall be transferred to work orders for correction as either emergency or Building and Grounds priorities.

As Needed

Manager/Maintenance Superintendent Responsibilities:

In the event that any component of an emergency lighting system is not working, the Manager or Maintenance Superintendent shall create a work order and/or contact a contractor to make appropriate repairs. In the event that an in-house Electrician completes the work, the Manager shall obtain all stock required for the repair. All such repairs shall be treated as very urgent.

26.2.3 Systems Inventory Information

A Battery Pack Emergency Lighting System Inventory and Specification sheet, including location and replacement part information, shall be maintained in the Systems Inventory Book and updated as needed. A site plan may be used to supplement this information and will be maintained in the Systems Inventory book. The Inventory shall also include a master checklist for inspections and services specific to the equipment at the site, as applicable. See S: FamEld Drive, SOP Master Building Systems Appendices for sample master Battery Pack Emergency Lighting system inventory, specification and checklists forms

26.2.4 Service Records

Records of all Battery Pack emergency lighting system preventive maintenance activities including all inspection and services checklists, repairs etc will be filed in the annual Service Record Binder in the Electrical Section. Records of all preventive maintenance (P) work orders shall be filed in the annual Service Record Binder as well as the work order system files. Records of all preventive maintenance purchase orders shall be filed in the annual Service Record Binder as well as the purchase order system files.

Copies of all formal Quarterly Building and Grounds Inspection forms must be included in the annual Service Record Binder.

All preventive maintenance activities must be included and tracked on your Annual Preventive Maintenance Plan – Schedule and Report form See S: FamEld Drive, SOP Master Building Systems Appendices for sample Annual PM Plan – Schedule and Report Form.

26.3 Intercoms

26.3.1 Objective:

To insure an operable intercom system for the safety of all residents.

26.3.2 Scheduled Activities:

Annually

Manager/Maintenance Superintendent Responsibilities:

In garden style buildings, the Manager/Maintenance Superintendent shall test all intercoms in the course of the annual living unit inspection program to insure their correct operation. In multi-family dwelling buildings, the Manager/Maintenance Superintendent may choose to perform the annual testing of the intercom system with the assistance of a Laborer/Groundskeeper. Utilizing two way radios is an efficient method of performing these inspections.

In the event that any intercom is not working properly, the Manager/Superintendent shall create a work order and/or issue a purchase order to have the intercom repaired by a contractor or an in-house Electrician.

Note: The intercom test can serve a second purpose by determining if any residents are buzzing people in without checking on who they are first. This can be an important part of safety education training.

26.3.3 Systems Inventory Information

An Intercom/door bell system Inventory and Specification sheet, including location and replacement part information, shall be maintained in the Systems Inventory Book and updated as needed. A site plan may be used to supplement this information and will be maintained in the Systems Inventory book. The Inventory shall also include a master checklist for inspections and services specific to the equipment at the site, as applicable. See S: FamEld Drive, SOP Master Building Systems Appendices for sample master Intercom system inventory, specification and checklists forms

26.3.4 Service Records

Records of all Intercom/door bell systems preventive maintenance activities including all inspection and services checklists, repairs etc will be filed in the annual Service Record Binder in the Electrical Section. Records of all preventive maintenance (P) work orders shall be filed in the annual Service Record Binder as well as the work order system files. Records of all preventive maintenance purchase orders shall be filed in the annual Service Record Binder as well as the purchase order system files. Records of intercom/door bell system repairs shall also be maintained as part of the Living Unit inspection system.

All preventive maintenance activities must be included and tracked on your Annual Preventive Maintenance Plan – Schedule and Report form See S: FamEld Drive, SOP Master Building Systems Appendices for sample Annual PM Plan – Schedule and Report Form.

26.4 Emergency Pull Cord (Call-for-Aid) Systems

26.4.1 Objective:

To insure that all pull cords are in proper working order to insure resident safety.

26.4.2 Scheduled Activities:

As-Needed

Manager/Maintenance Superintendent's Responsibilities:

Any time that an emergency pull cord is found to be out of order, the Manager or Maintenance Superintendent shall create an emergency work order, or issue an emergency purchase order to have it repaired immediately. This includes insuring that the chain or cord is hanging loosely below the actual switch and that all lights and enunciators are working properly.

Annually

Manager's Responsibilities:

Annually as part of every Living Unit Inspection, the Manager shall test the emergency pull cord to determine whether or not it is in good working order. In the event that the pull cord does not work, an emergency work order or purchase order shall be issued to have it repaired immediately.

26.4.3 Systems Inventory Information

An Emergency Pull Cord System Inventory and Specification sheet, including location of enunciators and enunciator panels and replacement part information, shall be maintained in the Systems Inventory Book and updated as needed. A site plan may be used to supplement this information and will be maintained in the Systems Inventory book. The Inventory shall also include a master checklist for inspections and services specific to the equipment at the site, as applicable. See S: FamEld Drive, SOP Master Building Systems Appendices for sample master Emergency Pull Cord system inventory, specification and checklists forms

26.4.4 Service Records

Records of all Emergency Pull Cord System preventive maintenance activities including all inspection and services checklists, repairs etc will be filed in the annual Service Record Binder in the Electrical Section. Records of all preventive maintenance (P) work orders shall be filed in the annual Service Record Binder as well as the work order system files. Records of all preventive maintenance purchase orders shall be filed in the annual Service Record Binder as well as the purchase order system files. Records of Emergency Pull Cord System repairs shall also be maintained as part of the Living Unit inspection system.

All preventive maintenance activities must be included and tracked on your Annual Preventive Maintenance Plan – Schedule and Report form See S: FamEld Drive, SOP Master Building Systems Appendices for sample Annual PM Plan – Schedule and Report Form.

26.5 Exterior Lights

26.5.1 Objective:

To maintain maximum exterior lighting at all times.

26.5.2 Scheduled Activities:

Daily/Weekly

Laborer/Groundskeeper/Custodian Responsibilities:

To inspect all exterior lights [mounted on buildings or pole lights] daily and report any problems such as broken fixtures or missing/broken bulbs to the Manager/Maintenance Superintendent immediately. All problems must be recorded on the weekly Building & Grounds short-form. The Manager/Maintenance Superintendent shall issue a work order for the repairs.

Weekly

Manager/ Maintenance Superintendent's Responsibilities:

During each weekly Building and Grounds Walk-through inspection, the Manager/Superintendent shall observe all exterior lights to note any problems. Manager/Superintendent must also review the completed weekly Building and Grounds inspection forms to make sure that all deficiencies recorded were reported [and visa-versa] and transferred to work orders for correction as either emergency or Building and Grounds priorities.

Quarterly

Manager/ Maintenance Superintendent's Responsibilities:

To conduct a formal inspection of the building exterior for each unique building address. Note any broken fixtures or missing/broken bulbs. All deficiencies found during any inspection shall be transferred to work orders for correction as either emergency or Building and Grounds priorities.

Annually

Manager Responsibilities:

Once each year, in October, the Manager shall inspect all exterior lights at night to insure that all are working properly.

Maintenance Superintendent Responsibilities:

Once each year, during the period from May to October, the Maintenance Superintendent shall arrange to change/repair/re-lamp all non-working exterior lights.

As Needed:

Maintenance Superintendent Responsibilities:

In the event that a lamp burns out or there are other problems with the exterior lights between annual re-lamping dates, the Maintenance Superintendent shall issue a work order and arrange to have the exterior light repaired.

26.5.3 Systems Inventory Information:

An Exterior Light Inventory and Specification sheet, including location and replacement part information, shall be maintained in the Systems Inventory Book and updated as needed. A site plan may be used to supplement this information and will be maintained in the Systems Inventory book. The Inventory shall also include a master checklist for inspections and services specific to the equipment at the site, as applicable. See S: FamEld Drive, SOP Master Building Systems Appendices for sample master Exterior Light system inventory, specification and checklists forms.

26.5.4 Service Records

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Records of all Exterior Lights preventive maintenance activities including all inspection and services checklists, repairs etc will be filed in the annual Service Record Binder in the Electrical Section. Records of all preventive maintenance (P) work orders shall be filed in the annual Service Record Binder as well as the work order system files. Records of all preventive maintenance purchase orders shall be filed in the annual Service Record Binder as well as the purchase order system files.

All preventive maintenance activities must be included and tracked on your Annual Preventive Maintenance Plan – Schedule and Report form See S: FamEld Drive, SOP Master Building Systems Appendices for sample Annual PM Plan – Schedule and Report Form.

Chapter 27 Elevators

27.1 Objective:

To insure the safe and continuous operation of elevators through regular service and inspection. To maintain elevators in accordance with applicable ordinances and codes,

27.2 Scheduled Activities:

Daily/Weekly

Laborer/Groundskeeper/Custodian Responsibilities:

Daily, the Laborer/Groundskeeper/Custodians shall clean the elevator cabs and sills, check the lighting in the cab and replace any burnt out bulbs (if applicable), check the call buttons, wipe down the electric eye and determine that each elevator is operable. In the event that an elevator is not functioning properly, he/she will report this to the Manager, or in his/her absence, to the Maintenance Superintendent. All problems must be recorded on the weekly B&G inspection form. If a certain address is habitually out of service due to use or vandalism, it should be brought to the attention of the Service Programs Coordinator.

Monthly

Elevator Service Contractor Responsibilities:

The Elevator Service Contractor is responsible for inspecting and servicing each elevator at least once each month or more frequently if so specified in the service contract. The tasks to be completed and the frequency for each task are defined on the BHA elevator preventive maintenance chart that is maintained in the elevator machine room. See S: FamEld Drive – SOP Master Building Systems Appendices for master Elevator preventive maintenance chart.

Quarterly

Manager/ Maintenance Superintendent's Responsibilities:

To conduct a formal inspection of the building's common areas for each unique building address. Record any problems noted with the Elevators and notify the Service Programs Coordinator.

Annually

Elevator Service Contractor /Service Programs Coordinator Responsibilities:

The Elevator Service Contractor is responsible for arranging for and coordinating with the Service Programs Coordinator, an annual inspection of all elevators by the State Elevator Inspector.

As Needed

Service Programs Coordinator Responsibilities:

The Service Programs Coordinator is responsible for bidding the elevator service contract every two years, for monitoring monthly performance against contract provisions, for insuring payments against the contract, and for making decisions concerning major repair work within the contract.

Manager/Maintenance Supervisor Responsibilities:

The Manager/Maintenance Supervisor is responsible for insuring that the elevator is properly cared for by the Laborer/Groundskeeper/Custodian, for reporting all problems with the elevator to the Service Programs Coordinator, and for obtaining copies of service slips for every visit by an Elevator service contractor. The Manager has authority to call the contractor for service on the elevator whenever it malfunctions during normal working hours. All calls for service shall be entered in the Elevator Service Log and tracked. See S: FamEld Drive – SOP Master Building Systems Appendices for master Elevator Service Log form.

Elevator Service Contractor's issues such as response times for emergencies, chronic issues with the same address or monthly maintenance work not performed should be brought to the attention of the Service Programs Coordinator immediately.

27.3 Policies for calling for emergency service

During normal working hours, the Manager and the Maintenance Superintendent have authority to contact the Elevator service contractor for service.

During non-working hours, The Work Order Center shall contact the Emergency Response Service Manager to report the problem. The ERS Manager will have authority to contact the Elevator service contractor for service.

In Developments with Special Assignment Laborers, the Work Order Center shall contact the Special Assignment Laborer, who will then check to determine if the elevator is malfunctioning, and be authorized to contact the Elevator service contractor for service. If the Special Assignment Laborer calls for service, he/she must meet the contractor, state the reason they have requested emergency service and sign service slip from elevator service contractor. A fire alarm will trigger the elevator into an emergency recall position. The Fire Alarm service contractor will have to be called to reset the system.

27.4 Policies for Inspection Notifications:

The manager is responsible for notifications to residents when the elevator car will be out of service due to inspections. Fire Alarm and Generator service contractors must be notified for yearly inspections and access must be provided. This should be coordinated with the Service Programs Coordinator.

27.5 Systems Inventory Information:

An Elevator Inventory and Specification sheet, including location and service contract information shall be maintained in the Systems Inventory Book and updated as needed. A site plan may be used to supplement this information and will be maintained in the Systems Inventory book. The Inventory shall also include a master checklist for inspections and services specific to the equipment at the site, as applicable. See S: FamEld Drive, SOP Master Building Systems Appendices for sample master Elevator inventory, specification and checklists forms, Elevator Service Logs and Elevator PM Chart.

27.6 Service Records:

Records of all Elevator preventive maintenance activities including all inspection checklists, service slips, repairs etc will be filed in the annual Service Record Binder in the Elevator Section. All preventive maintenance activities must be included and tracked on your Annual Preventive Maintenance Plan – Schedule and Report form See S: FamEld Drive, SOP Master Building Systems Appendices for sample Annual PM Plan – Schedule and Report Form.

The Elevator Service Contractor is responsible for filling in the BHA Elevator Preventive Maintenance Chart maintained in the elevator machine room at the time of each servicing and for providing a service slip for every visit (preventive or service visit) with information on the date, time and duration of the visit and on the work performed. This service slip shall be left with the Manager.

The Manager is responsible for maintaining all service call slips in the Service Records Binder. Service Programs Coordinator shall be responsible for maintaining central records of all service and testing etc.

Chapter 28 Fire Safety Systems

28.1 Fire Alarm – Connected Systems

28.1.1 Objective:

To insure that the fire alarm system is operating properly and is maintained in accordance with applicable ordinances and codes.

28.1.2 Scheduled Activities:

Weekly/Daily

Manager/Superintendent/Laborer/Groundskeeper/Custodian Responsibilities:

The Manager/Superintendent/Laborer/Groundskeeper/Custodian shall check the master alarm panel to determine that there is no trouble at the panel board, as indicated by a trouble light. The master alarm panel is located in various buildings at different Developments. In some Developments the master panel is located in the management office, in which case it is the responsibility of the Manager and management staff to monitor, record and report any problems.

Any problems with the panel or any fire alarm devices (i.e. smoke detectors and pull stations) shall be noted and reported to the Manager [whether it is located in the management office or elsewhere]. All problems must be recorded on the weekly Building & Grounds Inspection short forms. Newer panels will sound an alarm when a trouble is identified. This will have to be acknowledged in order to silence the alarm. The system stores the trouble in its memory. The alarm service contractor will have to be dispatched to repair/replace the device.

As Needed/Weekly

Manager Responsibilities:

The Manager shall report any problems with the fire alarm system immediately upon being informed of the problem to the Service Programs Coordinator. The Manager shall also check all pull stations and the alarm panel during the regular weekly walk-through inspection.

Fire Alarm Service Contractor/In-house Electrician Responsibilities:

The Fire Alarm service contractor or in-house Electrician shall be responsible for re-setting the alarm system acknowledging the trouble after every fire alarm. The fire alarm contractor should respond within two hours to fully re-set the system. If the contractor does not show up in this time period, managers and maintenance personnel should call them. Local device replacement only will be done by site electricians and these must be of the same type and brand as the existing system.

Quarterly

Manager Responsibilities:

The Manager shall coordinate all alarm testing procedures through appropriate notification to residents and by assisting the contractor by having the Laborer/Groundskeeper/Custodian available during testing to open apartment doors as needed.

Fire Alarm Service Contractor Responsibilities:

The contractor is responsible for quarterly testing of the fire alarm system. At each quarterly visit all alarm initiating devices (i.e. pull stations, smokes, system devices) will be checked, including 25% of all apartment

smoke detectors shall be tested, so that every device is tested at least once each year. The contractor shall be responsible for coordinating all testing with the development manager.

The Fire alarm service contractor is responsible for completing the Quarterly Inspection Reports and submitting copies to the Manager and to the Fire Department. The contractor is responsible for leaving service slips upon completion of any alarm reset or service visit with the manager.

Every two Years

Service Programs Coordinator Responsibilities:

The Service Programs Coordinator shall be responsible for bidding a service contract once every two years, or at such annual intervals as may be determined to be necessary. The Service Programs Coordinator shall be responsible for maintaining central records of all service and testing, and for payment of all invoices. The services programs coordinator shall be responsible for insuring that all maintenance over and above regular testing is necessary and for approving all expenditures of this type.

28.1.3 Systems Inventory Information:

A Fire Alarm System Inventory and Specification sheet, including location of all devices and service contract information shall be maintained in the Systems Inventory Book and updated as needed. A site plan may be used to supplement this information and will be maintained in the Systems Inventory book. The Inventory shall also include a master checklist for inspections and services specific to the system at the site. See S: FamEld Drive, SOP Master Building Systems Appendices for sample master Fire Alarm inventory, specification and checklists forms...

28.1.4 Service Records:

Development Records

Records of all Fire Alarm System preventive maintenance activities including all inspection checklists, service visits, regular testing, alarm resets and repairs etc will be filed in the annual Service Record Binder in the Fire Alarm Systems Section. The Manager shall maintain copies of all reports from the Fire Alarm Testing Contractor in the Service Record binder in chronological order and shall send the original to the Service Programs Coordinator immediately upon its receipt.

All preventive maintenance activities must be included and tracked on your Annual Preventive Maintenance Plan – Schedule and Report form See S: FamEld Drive, SOP Master Building Systems Appendices for sample Annual PM Plan – Schedule and Report Form.

Service Programs Coordinator Records

Records of all service visits, including regular testing, alarm resets, and repair calls shall be maintained by the service programs coordinator, along with invoices.

28.2 Fire Extinguisher Inspection and Service Procedure

28.2.1 Objective:

To insure that all required fire extinguishers are in place and serviced on a regular basis in accordance with applicable ordinances and codes.

28.2.2 Scheduled Activities:

Daily/Weekly

Laborer/Groundskeeper/Custodian Responsibilities:

Routinely, the Laborer/Groundskeeper/Custodian is responsible for checking that all fire extinguishers are in their proper locations, and that the seal is not broken and the inspection tag is in place. Any instances should be brought to the immediate attention of the Manager and/or the Maintenance Superintendent. All problems should be recorded on the weekly Building & Grounds Inspection short forms.

Weekly

Manager/ Maintenance Superintendent's Responsibilities:

During each weekly Building and Grounds Walk-through inspection, the Manager/Superintendent shall observe all fire extinguishers to note any problems. Manager/Superintendent must also review the completed weekly Building and Grounds inspection forms to make sure that all deficiencies recorded were reported [and visa versa] and transferred to work orders for correction as either emergency or Building and Grounds priorities.

Quarterly

Manager/ Maintenance Superintendent's Responsibilities:

To conduct a formal inspection of all building common areas. Inspect all fire extinguishers to make sure that they are in their proper locations, and that the seal is not broken and the inspection tag is in place. All deficiencies found during any inspection shall be transferred to work orders for correction as either emergency or Building and Grounds priorities.

Annually

Manager Responsibilities:

The Manager shall issue a purchase order on an annual basis to have all fire extinguishers inspected/serviced by an appropriate contractor. The Manager shall insure that all such inspections include appropriate tagging of all extinguishers indicating the date of the inspection.

Every five years

Manager Responsibilities:

Every five years, the Manager shall issue a purchase order to have all fire extinguishers pressure tested by an appropriate contractor.

28.2.3 Systems Inventory Information

A Fire Extinguisher Inventory and Specification sheet, including location, types, sizes, date of purchase information shall be maintained in the Systems Inventory Book and updated as needed. A site plan may be used to supplement this information and will be maintained in the Systems Inventory book. The Inventory shall also include a master checklist for inspections and services specific to the equipment at the site, as applicable. See S: FamEld Drive, SOP Master Building Systems Appendices for sample master Fire Extinguisher inventory, specification and checklists forms.

28.2.4 Service Records

Records of all Fire Extinguisher preventive maintenance activities including all inspection and service checklists, repairs/replacements etc will be filed in the annual Service Record Binder in the appropriate Section.

All preventive maintenance activities must be included and tracked on your Annual Preventive Maintenance Plan – Schedule and Report form See S: FamEld Drive, SOP Master Building Systems Appendices for sample Annual PM Plan – Schedule and Report Form.

All fire extinguishers shall be tagged by the contractor including the date inspected.

28.3 Sprinkler System Inspection and Service Procedure

28.3.1 Objective:

To insure the continuous, effective and efficient operation of the sprinkler system in accordance with all applicable codes and ordinances.

28.3.2 Scheduled Activities:

Daily/Weekly/as needed

Custodian/Laborer/Groundskeeper's Responsibilities:

The Custodian/Laborer/Groundskeeper shall report any leaking or damaged sprinkler heads as it is noticed to the manager/maintenance superintendent. The Laborer/Groundskeeper or Resident Custodian shall perform a visual inspection of the fire pump, check pump room heat weekly and report any problems/malfunction to the Manager/maintenance superintendent immediately. Any problems/ malfunction should be recorded on the weekly Building & Grounds short-form. Resident Custodians and Laborers/Groundskeepers shall remove all tape or other covering used to protect sprinkler heads during vacant unit preparation.

Manager's Responsibilities:

The Manager is responsible for reporting any damage to or suspected malfunctioning of the sprinkler system or pumps to the Service Programs Coordinator as soon as a problem is detected. The Manager shall arrange with the Superintendent to order and maintain additional heads on site for immediate replacement if/when the need arises.

Annually

Manager/Maintenance Superintendent's Responsibilities

The Manager/Superintendent is responsible for coordinating all sprinkler flow and pump testing with the Service Programs Coordinator and the contractor on an annual basis. This service should include, but not be limited to, flow testing to insure that alarms will sound if sprinkler is triggered, and, pump testing for fire and/or jockey pump.

Service Programs Coordinator Responsibilities

The Service Program Coordinator shall be responsible for obtaining quotes/bids on an annual basis and issuing a contract or purchase order for annual testing of the sprinkler system by an independent licensed sprinkler systems company. This testing is to insure that pump will perform to provide the designed amount of water at the designed pressure in the event of a fire. The Service Programs Coordinator shall be responsible for insuring adequate oversight of the contract; issuing work orders or PO for follow up repair work, and paying bills.

28.3.3 Systems Inventory Information

A Sprinkler System Inventory and Specification sheet, including location of all devices, replacement parts, as needed and service contract information shall be maintained in the Systems Inventory Book and updated as needed. A site plan may be used to supplement this information and will be maintained in the Systems Inventory book. The Inventory shall also include a master checklist for inspections and services specific to the equipment at the site, as applicable. See S: FamEld Drive, SOP Master Building Systems Appendices for sample master Sprinkler System inventory, specification and checklists forms.

28.3.4 Service Records

Development Records

Copies of all records of all Sprinkler System preventive maintenance activities including all inspection checklists, service visits, annual testing and repairs etc will be filed in the annual Service Record Binder in the Fire Alarm Systems Section. The Manager shall maintain copies of all reports from the Sprinkler System Testing Contractor in the Service Record binder in chronological order and shall send the original to the Service Programs Coordinator immediately upon its receipt. Records of all preventive maintenance (P) work orders shall be filed in the annual Service Record Binder as well as the work order system files. Records of all preventive maintenance purchase orders shall be filed in the annual Service Record Binder as well as the purchase order system files.

All preventive maintenance activities must be included and tracked on your Annual Preventive Maintenance Plan – Schedule and Report form See S: FamEld Drive, SOP Master Building Systems Appendices for sample Annual PM Plan – Schedule and Report Form.

Service Programs Coordinator Records

Records of all service visits, including annual testing and repair calls shall be maintained by the service programs coordinator, along with invoices.

28.4 Smoke Detector Service Policy

28.4.1 Objective:

To insure that all smoke detectors in all common areas are operational at all times. Note: all hard-wired smoke detectors include a battery for back up purposes. Therefore, all new smoke detectors installed, even if the hard-wired type will require annual battery changes.

28.4.2 Scheduled Activities:

Daily/Weekly/As Needed

Custodian/Laborer/Groundskeeper Responsibilities:

The Custodian/Laborer/Groundskeeper shall note all missing or damaged battery operated smoke detectors during the course of day to day work and report any problems immediately to the Manager/Superintendent. All problems must be recorded on the weekly Building and Grounds inspections short-form. In the event that a battery needs replacing (as indicated by a "beep" from the unit) the Custodian/Laborer/Groundskeeper shall immediately replace the battery. Damaged device enclosures must also be noted.

Manager/Maintenance Superintendent Responsibilities:

The Manager/Maintenance Superintendent is responsible for issuing a work order and instructing a mechanic to replace all defective or missing battery smoke detectors immediately upon learning of the problem. The Manager/Maintenance Superintendent is responsible for keeping on hand adequate numbers of batteries and smoke detectors. Smoke detectors can be ordered from the BHA 120 Stock System. Batteries on hand for replacement should be checked for date code before being installed.

Quarterly

Manager/Maintenance Superintendent Responsibilities

The Manager is responsible for testing all battery-operated smoke detectors on each quarterly building and grounds inspection by activating the test button. The Manager may delegate this responsibility to the Laborer/Groundskeeper or Electrician, but shall be responsible for insuring that this is completed fully every quarter.

Annually

Custodian/Laborer/Groundskeeper Responsibilities:

Once every year, in October, the laborer/groundskeeper shall replace all batteries in all battery operated smoke detectors in common areas as a preventive maintenance measure. This shall also apply to batteries in the new type of hard-wired smoke detectors that include a battery back up. Batteries in smoke detectors in apartments shall be changed at the time of the annual Living unit inspection.

28.4.3 Systems Inventory Information

A Smoke Detector Inventory and Specification sheet, including location of all devices, including information on battery or hard wired, and system connected or not connected and replacement part information shall be maintained in the Systems Inventory Book and updated as needed. A site plan may be used to supplement this information and will be maintained in the Systems Inventory book. The Inventory shall also include a master checklist for inspections and services specific to the equipment at the site, as applicable. See S: FamEld Drive, SOP Master Building Systems Appendices for sample master Smoke Detector inventory, specification and checklists forms.

28.4.4 Service Records

Copies of all records of all Smoke Detectors preventive maintenance activities including all inspection and service checklists, regular testing and repairs etc will be filed in the annual Service Record Binder in the Fire Alarm Systems Section. All defective smoke detectors shall be reported on the Building and Grounds Inspections [Weekly - Short and Quarterly - Long Forms] and LUI inspections. All replacement of batteries in common areas must be recorded on a checklist format using the smoke detector inventory/specification sheets and filed in the Service Record Binder.

Records of all preventive maintenance (P) work orders shall be filed in the annual Service Record Binder as well as the work order system files. Records of all preventive maintenance purchase orders shall be filed in the annual Service Record Binder as well as the purchase order system files

All preventive maintenance activities must be included and tracked on your Annual Preventive Maintenance Plan – Schedule and Report form See S: FamEld Drive, SOP Master Building Systems Appendices for sample Annual PM Plan – Schedule and Report Form.

28.5 Smoke Hatch Inspection and Service Procedure

28.5.1 Objective:

To insure that the smoke hatch component of the fire alarm system is operating properly and is maintained in accordance with applicable ordinances and codes.

28.5.2 Scheduled Activities:

Daily/Weekly

Custodian/Laborer/Groundskeeper Responsibilities:

The Laborer/Groundskeeper shall visually inspect the smoke hatch for any noticeable problems, such as opened hatches, tampering with manual cords and/or vandalism. The Custodian/Laborer/Groundskeeper shall report any problems to the Manager/Maintenance Superintendent immediately. All problems must be recorded on the weekly Building & Grounds short-forms.

Manager/Maintenance Superintendent Responsibilities:

The Manager/Maintenance Superintendent shall report any problems with the smoke hatch or other fire alarm system components immediately upon being informed of the problem to the Service Programs Coordinator. The Manager/Maintenance Superintendent shall also check the pull cord and the hatch during all weekly walk-through inspections. The Manager/Maintenance Superintendent shall report all resets to the Service Programs Coordinator immediately following each occurrence.

Quarterly

Manager Responsibilities:

The Manager shall coordinate all testing procedures related to smoke hatches, as part of any regular connected system inspection, through appropriate notification to residents and by assisting the contractor by having the Custodian/Laborer/Groundskeeper available during testing to allow entry into common area hallways as needed.

Annually / Every 2 years

Service Programs Coordinator Responsibilities:

The Service Programs Coordinator shall be responsible for bidding a service contract once every two years, or at such annual intervals as may be determined to be necessary. The Service Programs Coordinator shall be responsible for insuring that all maintenance over and above regular testing is necessary and for approving all expenditures of this type.

28.5.3 Systems Inventory Information

A Smoke Hatch Inventory and Specification sheet, including location and replacement part information shall be maintained in the Building Systems Inventory Book and updated as needed. A site plan may be used to supplement this information and will be maintained in the Systems Inventory book. The Inventory shall also include a master inspection and service checklist specific to the equipment at the site, as applicable. See S: FamEld Drive, SOP Master Building Systems Appendices for sample master Smoke Hatch inventory, specification and checklists forms.

28.5.4 Service Records:

Development Records:

Copies of all records of all Smoke Hatch preventive maintenance activities including all inspection and service checklists, regular testing and repairs etc will be filed in the annual Service Record Binder in the Fire Alarm Systems Section. All defective smoke hatches shall be reported on the Building and Grounds Inspections [both the weekly short-form and the quarterly long-form].

Records of all preventive maintenance (P) work orders shall be filed in the annual Service Record Binder as well as the work order system files. Records of all preventive maintenance purchase orders shall be filed in the annual Service Record Binder as well as the purchase order system files.

All preventive maintenance activities must be included and tracked on your Annual Preventive Maintenance Plan – Schedule and Report form See S: FamEld Drive, SOP Master Building Systems Appendices for sample Annual PM Plan – Schedule and Report Form.

The Manager shall maintain copies of all reports from the fire alarm testing contractor in the Service Records binder, and shall send the originals to the Service Programs Coordinator immediately upon receipt.

Service Programs Coordinator Records:

The Service Programs Coordinator shall be responsible for maintaining central records of all service and testing.

Chapter 29 Generators

29.1 Objective:

To ensure a continuous, efficient and reliable source of stand-by electrical energy through regular maintenance and service of the emergency generator.

29.2 Scheduled Activities:

Weekly

Manager/Maintenance Super/Electrician/Resident Custodian Responsibilities:

The Manager/Maintenance Superintendent is responsible for insuring that the Electrician performs a weekly inspection of the emergency generator and performs the tasks detailed on the Emergency Generator Weekly Service Activity Report. The Electrician shall complete the report, sign it and give it to the Maintenance Superintendent each week upon completion. Resident Custodians shall complete this checklist at Elderly/Disabled developments. See S: FamEld Drive, SOP Master Building Systems Appendices to obtain a master copy of Emergency Generator Weekly Service Activity Report.

Quarterly

Service Contractor Responsibilities

The service contractor shall be responsible for performing quarterly inspections and service as detailed on the Emergency Generator Inspection and Service Report. See S: FamEld Drive, SOP Master Building Systems Appendices to obtain a master copy of Emergency Generator Inspection and Service Report

Annually

Generator Service Program Coordinator Responsibilities:

The Service Program Coordinator is responsible for obtaining quotes and issuing a purchase order on an annual basis to a qualified contractor for quarterly and annual service to the emergency generator and for insuring that the contractor completes all required activities on time.

The Generator Service Program Coordinator is responsible for obtaining quotes and issuing a purchase order on an annual basis to a qualified contractor for annual service and testing of the Automatic Transfer Switch.

Generator Service Contractor Responsibilities

At one quarterly service visit each year, the Generator service contractor shall complete all of the annually required tasks as indicated on the Emergency Generator Inspection and Service Report.

Manager Responsibilities

The manager shall arrange to have the fuel tank topped off at least once per year.

As Needed

Manager

The Manager shall be responsible for obtaining quotes and issuing purchase orders for repairs required to the generator which is above and beyond the scope of the annual service contract. The generator should be re-fueled after each use in an emergency condition and topped off on an annual basis.

Service Program Coordinator

The Service Program Coordinator shall be responsible for reviewing repair or replacement decisions in consultation with the manager and assisting the manager in determining actions to be taken.

29.3 Systems Inventory Information

A Generator Inventory and Specification sheet, including location and spare/replacement part information, fuel information, regular run time shall be maintained in the Systems Inventory Book and updated as needed. A site plan may be used to supplement this information and will be maintained in the Systems Inventory book. The Inventory shall also a master checklist of inspections and services specific to the equipment at the site, as applicable. See S: FamEld Drive, SOP Master Building Systems Appendices for sample master Generator inventory, specification and checklists forms.

29.4 Service Records

Development Records:

Copies of all records of all Generator preventive maintenance activities including all inspection checklists, service visits, regular testing and repairs etc will be filed in the annual Service Record Binder in the Fire Alarm Systems Section. The Emergency Generator Weekly Service Activity Report is to be completed by the Superintendent and Electrician or Resident Custodian (for elderly developments) and submitted to the development Manager. All copies shall be maintained in the Service Record Binder.

The Emergency Generator Inspection and Service Reports are completed by the Generator service contractor at the time of each inspection and are submitted to the development Manager upon completion of the service. The contractor may use its own company form. These reports shall be signed by the contractor's service representative and maintained in the service record binder. The original shall be sent to the Service Programs Coordinator immediately upon receipt.

Records of all preventive maintenance (P) work orders shall be filed in the annual Service Record Binder as well as the work order system files. Records of all preventive maintenance purchase orders shall be filed in the annual Service Record Binder as well as the purchase order system files

All preventive maintenance activities must be included and tracked on your Annual Preventive Maintenance Plan – Schedule and Report form See S: FamEld Drive, SOP Master Building Systems Appendices for sample Annual PM Plan – Schedule and Report Form.

Service Programs Coordinator:

The Service Programs Coordinator shall be responsible for maintaining central records of all service and testing.

Chapter 30 Heating Systems

30.1 Introduction to Heating System Maintenance

Maintenance of heating systems is among the most important maintenance to be performed within the Preventive Maintenance Plan. Heating systems including the central heating plants or the decentralized boiler rooms, the distribution systems, and heating fixtures and controls inside the units require consistent and regular maintenance to serve out their useful life and provide the very basic service of heat and hot water to all residents of our developments. In many locations, significant capital investments have been made to the heating systems throughout the City, and a number of other projects are in the planning, design, or construction stages. It is crucial that we protect this investment.

Managers, Maintenance Superintendents, Heating Systems Coordinator and Inspector, Burner Technicians, Firemen, and Steamfitter's play very important roles.

It is the primary responsibility of the Fireman to perform daily monitoring and maintenance functions to the central heating plants and/or decentralized heating boiler rooms as specified in the union contract and the primary responsibility of the Heating System Coordinator and Inspector to perform more complex tasks, inspect the work of the Firemen and Burner Technicians and make recommendations for replacement and repair of various systems and components. The Heating Systems Coordinator and Inspector will be responsible for monitoring and managing work performed by outside contractors. The Heating Systems Coordinator will retain overall responsibility for overseeing central heating plant and decentralized heating boiler room work.

Because of physical proximity, and in some cases the interrelated system components, of domestic hot water systems at most of the developments supported by the heating system, the central domestic hot water system is covered in this section.

Although preventive maintenance is not performed on electric heating systems (except as part of apartment and buildings and grounds inspections) we have included a short section on the maintenance of stock for electrically heated developments due to the extreme important of having stock on hand for heating repairs in the event of an emergency.

The heating system with forced warm air and heat pumps applies to the building at 52 Chauncy Street in Boston only.

It is extremely important that the material in this section is accurately completed and that the procedures and policies called for are strictly adhered to for the continued proper operation and longevity of the systems across the City.

30.2 Central Plants & Decentralized Boiler Rooms

30.2.1 Objective

To insure the continuous operation of all heating systems including equipment, controls, and the central domestic hot water components, to prolong the life of all equipment, components, and controls related to efficient heat generation and distribution, and to create and maintain a healthy indoor environment.

30.2.2 Scheduled Activities

Daily

Fireman Responsibilities:

The fireman is responsible for daily monitoring systems operations, performing routine maintenance services to central heating plants and/or decentralized boiler rooms as required, recording systems operational data and fuel consumption/ordering/delivery data, identifying the system or components' deficiencies if any and reporting them to Manager and/or Maintenance Superintendent, Heating System Coordinator or Inspector immediately. The fireman is responsible for filling out the *Boiler Room Service Activity Report* daily and maintaining a daily log of central plant or decentralized boiler room's activities in the logbook, which shall be located inside the boiler room. The specific duties to be performed at each site as called out in the union contract are detailed on daily *Service Activity Reports* specific to the particular plant or boiler room being serviced, including regular disposal of rubbish and periodic sweeping, washing, and painting of floors. The daily *Service Activity Report* shall be submitted monthly to the Heating System Coordinator/ Inspector and contain a record of all activities performed. The fuel oil ordering/delivery data/slips shall be submitted weekly to the Manager or Maintenance Superintendent. These slips must be forwarded to the Accounts Payable Department in a timely manner [Refer to section 30.13].

Boiler Room Service Activity reports specific to the boiler room at your Development can be obtained on the Fam/Eld S:Drive, in the *SOP Profile and Building Systems by Development* folder. This folder is organized into sub-folders for each development. Each Development sub-folder is further divided into folders for each system/component/structure subject to preventive maintenance. The Heating systems information sheets/reports etc, specific to the systems located at your Development can be obtained from the Heating sub-folder within your Development folder.

In the event of very urgent or emergency problems, and the unavailability of the development staff and Heating System Coordinator/Inspector, the fireman shall report the problems directly to the Emergency Response Service. The ERS staff or the dispatcher who answers the call after regulator hours will relay the message to the BHA Duty Officer.

Maintenance Fireman or Fireman during Off-Heating Season Responsibilities:

Spare fireman during heating season shall report to BHA Heating Dept for their daily assignments. Based on the fireman shift coverage, the spare fireman may be assigned to a regular shift covering a specific area if the regular fireman is absent, then he shall follow the procedures specified above. The spare firemen or the maintenance firemen during off-heating season will be assigned to a specific heating plant or boiler room for maintenance and cleaning work daily as instructed by the Heating System Coordinator or Heating System Inspector.

All firemen are responsible to obtain, from the BHA Central Store, maintain, and use the personal protection safety equipment based on the work they are assigned. They are responsible to follow all the regulations and rules outlined in the BHA Employee Safety and Loss Control Handbook and MSDS Binder.

Burner Technicians Responsibilities:

Burner Technicians are responsible to perform daily boiler/burner or system components' repair, adjustment, replacement, or burners' cleaning, fine-tuning, and start-up work as assigned by the Heating System

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Coordinator and Inspector, or respond to the service calls during evening shift or over weekend as directed by the ERS.

Weekly

Heating Systems Coordinator/Inspector Responsibilities:

The Heating Systems Coordinator or Inspector shall perform no less than a weekly inspection of all central boiler plants and boiler rooms covered by the firemen and shall instruct fireman of additional maintenance at that time in accordance with the development maintenance checklist (see appendix).

The Heating Systems Coordinator has overall responsibilities for insuring proper operation of the heating boilers and major components in the central heating plants and decentralized boiler rooms, which are monitored and covered by the firemen on daily basis, and the completion of all required maintenance, repair, and the replacement work performed on them. The Heating System Coordinator or Inspector shall submit purchase requisitions for service work that require to be carried out by contractors from outside the BHA to the Building System Maintenance Director for approval.

Manager/Maintenance Superintendent Responsibilities:

The Manager/Maintenance Superintendent shall inspect the central heating plant or the boiler room on at least a weekly basis as part of the Building and Grounds Inspection. The Manager/Maintenance Superintendent shall observe heating plant and boiler room for performance of Fireman's areas for cleanliness and proper lighting. At this time, the Manager/Maintenance Superintendent shall enter in the Boiler Room logbook an entry indicating his or her reason for being in the boiler room. Each heating plant or boiler room must have a boiler room log book.

The Manager/Maintenance Superintendent shall inspect the distribution piping, fittings, and valves in the building basement for any sign of leaks or malfunctions. All deficiencies found during any inspection shall be reported to the Heating Systems Coordinator and/or transferred to work orders for correction as either emergency or Building and Grounds priorities

Quarterly

Manager/Maintenance Superintendent Responsibilities:

To conduct a formal inspection of the heating plant and boiler room during the quarterly Building and Grounds Inspections. The Manager /Maintenance Superintendent shall inspect all areas for cleanliness and proper lighting. The Manager /Maintenance Superintendent shall inspect distribution piping, fittings, and valves in the building basement for any sign of leaks or malfunctions. Check components for rust/corrosion. All deficiencies found during any inspection shall be reported to the Heating Systems Coordinator and/or transferred to work orders for correction as either emergency or Building and Grounds priorities

At this time, the Manager/Maintenance Superintendent shall enter in the Boiler Room logbook an entry indicating his or her reason for being in the boiler room.

Annually

Heating Systems Coordinator/Inspector Responsibilities:

Each year the Heating Systems Coordinator shall schedule boiler cleanings and arrange for jurisdictional inspections at all developments. These boiler cleanings shall include all the work listed on the "Boiler Cleaning and State Mandated Inspection Scope of Services" attached. All cleanings and inspections shall take place between the period of June 15 and September 15 of each year. The Heating System Coordinator or Inspector shall submit purchase requisitions for annual services and cleaning out some of the boilers/heaters and components that require to be carried out by factory-trained technicians to the Building System Maintenance Director for approval.

Each year, the Heating Systems Coordinator shall arrange for the Burner Technicians to service and perform general preventive maintenance on all central heating plants' boilers and related major components such as boiler feed pumps, feed valves, ID fans, and controls. This service shall be performed in compliance with the "Burner Service Scope of Services" attached. All service shall be completed each year between June 15

and September 15. The Heating System Coordinator or Inspector shall submit purchase requisitions for obtaining the new complete components or replacement kits if the replacement of the components or kits is needed to the Building System Maintenance Director for approval.

The Heating Systems Coordinator and Inspector shall develop a list of summer maintenance and replacement projects for the central heating plants or decentralized boiler rooms, the distribution system components, and the controls. They shall arrange to purchase appropriate stock, plan and schedule the work to be performed by the fireman, burner technician, the steamfitter and electrician. The Heating Systems Coordinator and Inspector shall work with the Manager or Maintenance Superintendent to coordinate all such projects, including system shut-down and apartment access for apartment work etc.

As needed

Heating Systems Coordinator/Inspector Responsibilities:

The Heating Systems Coordinator and Inspector shall report all repairs required in the boiler rooms or central heating plants such as plumbing and sewer leaks, lighting, access, alarm systems etc.; and the leaks on the distribution system in the basement space to the Maintenance Superintendent, as needed, especially repairs requiring assistance from BHA trade persons.

The Heating Systems Coordinator and Inspector shall document and relay the information to the Manager or Maintenance Superintendent regarding all the work performed on the heating systems by the steamfitter and electrician so it can be recorded on the development work order system.

Manager Responsibilities

The Manager shall work with the Maintenance Superintendent and the Heating System Coordinator and Inspector as needed to insure that maintenance is performed and repairs are made to the heating system including the heating plant/boiler room, distribution system, controls, and heating fixtures inside the unit. The Manager shall make all decisions concerning major repairs to heating distribution systems in the basement, underground, and inside the residential units. The Manager shall approve all purchase orders for stock, repair or replacement work, and annual preventive maintenance service as listed above.

The Manager has overall responsibilities for insuring that all heating plant and boiler rooms maintenance and repair is completed properly and on time to insure service delivery to residents.

The Manager with the assistance of the Heating Systems Coordinator and Inspector shall work with the Project Manager or Architect to determine priorities of the needed heating systems improvements, select designers, develop designs and manage construction contracts for all major repair and replacement of heating systems and components.

30.2.3 System Inventory Information:

The Development Heating System Inventory & Specification sheet shall contain detailed specifications of all boilers, burners, controls, major components and controls on the distribution piping, heating fixture and controls inside the unit, and auxiliary equipment and instrument including major spare parts and shall be maintained in the Building Systems Inventory Book and updated as needed. The Inventory shall also include all daily, weekly, monthly, and annual service checklist forms specific to the equipment & instrument at the site. The inventory will also include location information and a site map can be used to supplement this.

Central Heating Plant and Decentralized Heating Boiler Room Information Sheets shall be provided by the Heating Maintenance Unit for all Family Developments and can be found in the S: FamEld Drive, *SOP Profile and Building Systems by Development* folder. This folder is organized into sub-folders for each development. Each Development sub-folder is further divided into folders for each system/component/structure subject to preventive maintenance. The Heating systems information sheets, specific to the systems located at your Development can be obtained from the Heating sub-folder within your Development folder.

See S: FamEld Drive, *SOP Master Building Systems Appendices* for sample master Central Heating Plant and Decentralized Heating Boiler Room inventory, specification and checklists forms if the Heating Maintenance Unit does not have this information for the heating system at your Development

30.2.4 Service Records

Development Records:

The Fireman's Daily Checklist shall be submitted weekly to the Manager or Maintenance Superintendent and the original maintained in the Service Record Book, or in separate file folders in chronological order.

The central plants and boiler rooms' logbooks shall be submitted annually to the Manager or Maintenance Superintendent and maintained in the development management office.

The fuel oil delivery slips shall be submitted weekly by the fireman to the Manager or Maintenance Superintendent. These slips must be forwarded to the Accounts Payable Department in a timely manner [Refer to section 30.13]

The Heating System Inspector's weekly Inspection and Service Report will be submitted to the Heating System Coordinator and copied to the development Manager for filing in the Service Records Book.

Records of all preventive maintenance (P) work orders completed by the steam fitter, plumber, and electrician shall be filed in the annual Service Record Binder as well as the work order system files. Records of all preventive maintenance purchase orders shall be filed in the annual Service Record Binder as well as the purchase order system files

All preventive maintenance activities must be included and tracked on your Annual Preventive Maintenance Plan – Schedule and Report form See S: FamEld Drive, *SOP Master Building Systems Appendices* for sample Annual PM Plan – Schedule and Report Form.

Heating Department Records

All records of service and repairs performed including annual boiler cleanings and preventive maintenance service as well as other contracted repairs shall be maintained in the Heating Dept. by the Heating System Coordinator and Inspector. Copies shall be maintained in the Service Record Binder.

All records of service and repairs performed including annual boiler cleanings and preventive maintenance by BHA Firemen and/or Burner Technicians shall be maintained in the Heating Dept. by the Heating System Coordinator and Inspector. Copies shall be maintained in the Service Record Binder.

30.3 Boiler Cleaning and Jurisdictional Inspection

Boiler cleanings shall be performed annually by qualified contractors or development Firemen and Burner Technicians in accordance with the scope of services listed below. Following the cleaning, and prior to closing the boiler, the Heating Systems Coordinator and Inspector shall arrange for an insurance inspection for the boilers that are subject to annual state inspection according to state code and regulations. The following scope of services shall be adhered to:

Prior to Calling Insurance Company's Boiler Inspector:

1. All firesides are to be properly brushed and vacuumed. This includes tubes in the fire tube boilers and gas passes in cast iron sectional boilers.
2. All fireboxes are to be cleaned and vacuumed.
3. All hand hole plates and manhole covers are to be removed and surface cleaned.
4. All controls and plugs are to be opened and flushed out.

5. The area around the boiler including the boiler itself (top, etc.) is to be cleaned and free of soot.

Prior to and During the Inspection:

1. Water shall be drawn off and the waterside thoroughly washed out.
2. Manhole and hand hole plates, washout plugs, as well as inspection plugs in water column connections shall be removed as required by the inspector. The furnace and combustion chambers shall be cooled and thoroughly cleaned.
3. Insulation and brickwork shall be removed if required by the inspector in order to determine the condition of the boiler, headers, furnace, supports or other parts.
4. The pressure gauge shall be removed for testing if required by the Inspector.
5. Any leakage of steam or hot water into the boiler shall be prevented by disconnecting the pipe or valve at the most convenient point or at any appropriate means approved by the inspector.
6. Before opening the manhole or manholes and entering any part of a boiler that is connected to a common header with any other boilers, the required steam or water system valves or cocks between the two closed stop valves opened. The feed valves must be closed, tagged and preferably padlocked, and drain valves or cocks between the two valves opened. After draining the boiler, the blow-off valves shall be closed, tagged, and preferably padlocked. Blow-off lines, where practicable, shall be disconnected between pressure parts and valves. All drains and vent lines shall be opened.

After the Inspection:

- The original Boiler Inspection Certificates when issued shall be maintained at BHA Heating Dept., one copy set shall be displayed in the boiler plant or boiler room, and another set shall be kept in file by the development management.
- If the boiler fails to pass the inspection, the Heating Systems Coordinator/Inspector and the development staff shall work together to identify the reason for failure on the inspection, address the deficiencies if any, and arrange re-inspections if needed until the Boiler Inspection Certificate is obtained.
- Heating Systems Coordinator/Inspector shall inform the BHA Risk Management the inspection problem and result whenever it becomes available.

30.4 Annual Preventive Maintenance and Start up Services – Gas Fired Boiler Systems

For gas-fired boiler systems, a qualified service contractor or qualified BHA service personnel shall perform annual preventive maintenance and start up services in accordance with the scope of services listed below.

Scope of Services

1. Report upon arrival to BHA Representative when required.
2. Inspect and report on conditions of refractory, exhaust hood, and heat exchangers if applied.
3. Drain and recharge expansion tanks for hydronic heating system.
4. Inspect all boiler controls and safeties on individual boiler and on the common header. Inspect the combustion air in-take fan and/or exhaust louver opening for proper operation.
5. Inspect ignition assembly replace electrode if needed, inspect pilot thermocouples, scanner, and replace them if needed.
6. Tighten electrical connections to individual controls, pump, valve, and inside the control panel.
7. Open and clean boiler pump's controller, low water cutoffs, and automatic feeder if applied.
8. Test all boilers, inspect the gas trains and adjust gas manifold pressure, and adjust fuel-air ratio and check sequences of operations. Check the exhaust damper opening and draft inducer operation if applied.
9. Test the prove function of pilot status, limits, flow switches, combustion air intake and/or exhaust louver opening, and operating controls.

10. Adjust and calibrate indoor/outdoor temperature settings and burner sequencing control.
11. Remove gas manifold and gas header.
12. Remove pilot assemblies and burners.
13. Clean gas train orifice opening, pilot assemblies, and burners.
14. Reassemble burner and gas manifolds (replace burner gaskets).
15. Perform efficiency tests on each boiler and provide a written test report to BHA and tag system with test results.
16. Submit report to BHA on boiler condition and suggest the needed repairs as required.

30.5 Annual Preventive Maintenance and Start up Services – Oil Fired Boiler Systems

Annual preventive maintenance and start up services shall be performed on all oil-fired boiler systems by a qualified service contractor or BHA Fireman and Burner Technician in accordance with the scope of services listed below. This service shall be performed by September 15 of each year.

Scope of Services

1. Report in with BHA representative
2. Record and report abnormal conditions, measurements taken etc.
3. Inspect all burner linkages for proper installation and/or damage
4. Test primary and secondary shut off dampers for tight seal.
5. Inspect linkages for ease of operation and lubricate as required.
6. Verify operation of primary and secondary air dampers and inspect for cleanliness

High and Low Pressure Air Atomizing Oil Burner Only

1. Remove and replace nozzles
2. Inspect condition of, and replace the air filter element
3. Inspect installation of mounting points and tighten all major points

Atomizing Supply Air Compressor

1. Lubricate motor bearings
2. Lubricate compressor bearings
3. Inspect pull grooves and belts for alignment, wear and tension, and replace belt (s)
4. Verify operation of air compressor
5. Inspect and correct for unusual noises, vibrations, odors, etc
6. Inspect motor windings for dirt buildup and clean
7. Inspect starter for signs of wear, overheating, arcing, burns, etc.
8. Lubricate coupling
9. Visually inspect coupling for abnormal conditions
10. Change oil and oil filter
11. Change air filter

Rotary Cup Oil Burner (only)

1. Clean, inspect and lubricate all mechanical linkages and couplings
2. Lubricate all bearings and gears
3. Clean atomizing cup

Mechanical Atomizing Oil Burner (Only)

1. Remove, clean and inspect nozzles

Force or Induced Draft Blower

2. Inspection condition of and clean blowers and air passages

3. Inspect installation of mounting points and tighten all major points
4. Visually inspect coupling for abnormal conditions
5. Lubricate coupling
6. Inspect motor windings for dirt build up.
7. Lubricate motor bearings
8. Inspect for unusual noises, vibrations, odors etc.
9. Lubricate blower bearings
10. Inspect pulley grooves and belts for alignment, wear and tension (replace belts)
11. Inspect starter for signs of wear, overheating, arching, burns, etc.

Fuel System and Oil Pumps

1. Inspect area around pump seals for seal leakage
2. Inspect installation of mounting points and tighten all major points
3. Inspect starter for signs of wear, overheating, arcing, burns, etc.
4. Verify operation and setting of oil pressure regulator
5. Replace cartridge type oil filter and gasket if necessary
6. Inspect for unusual noises, vibrations, odors, etc.
7. Lubricate pump bearings
8. Lubricate coupling
9. Inspect and Lubricate motors
10. Inspect motor windings for dirt build up
11. Visually inspect accessible fuel delivery system for leaks.

Pre-heater

1. Verify operation of oil pre-heater system
2. Verify accuracy of pre-heater pressure and temp gauges - replace if defective

Pilot

1. Leak test pilot gas train (soap test)* if applied
2. Inspect ignition assembly replace electrode and ignition wiring including raja clips
3. Inspect pilot orifice and clean
4. Inspect and set spark gap

Flame safeguard

1. Clean flame detectors
2. Test flame detention device
3. Test minimum pilot test
4. Test pilot flame failure protection
5. Test main flame failure protection
6. Perform combustion test and adjust air mixture as necessary (CO2 Test)
7. Test for detection with hot combustion chamber

Operational Test

1. Test low oil pressure safety circuit
2. Test low oil temperature safety circuit
3. Verify operation of operating controls
4. Inspect flame condition
5. Test atomizing air pressure supervisory switch
6. Test all special safety devices
7. Verify operation of high operating limit controls

30.6 Centralized Domestic Hot Water Systems

30.6.1 Objective:

To insure the continuous operation of the centralized domestic hot water heating system, for proper delivery of service to the residents according to state plumbing and sanitary codes.

30.6.2 Scheduled Activities

Daily

Fireman Responsibilities:

The Fireman is responsible for performing daily inspections and service of the domestic hot water system. The Fireman shall maintain in the daily log of boiler room activities, including the temperature of the heated water stored in the tanks and at the outlet of the tempering valve if available, or the water temperature just coming out of the instantaneous hot water heaters when applied. The Fireman shall inspect the heating (either steam or heating hot water) control valve, city water feed, and domestic hot water re-circulating pump for proper operation. The Fireman shall visual inspect any sign of leaks around the system and report any deficiency to Heating the Manager and System Coordinator/Inspector. This daily checklist as part of the heating system shall be submitted weekly to the Manager and the Heating Dept. accordingly.

Weekly

Fireman Responsibilities

Oil Fired developments during off-heating season: to insure the continued operation of the central heating system, weekly, the Fireman shall dip the oil tank and take a reading. The Fireman shall log this reading to the boiler plant logbook and copy it to Maintenance Superintendent who will order oil as needed. The Fireman or Maintenance Superintendent shall be responsible for obtaining delivery slips from the deliverer and giving them to the Manager for immediate submission to the Accounts Payable Coordinator. Please note: during the heating season, tank should be checked daily or at more frequent intervals. Oil may be ordered any working day.

Manager Responsibilities

The Manager shall inspect the boiler room on at least at weekly basis as part of the Building and Grounds Inspection. Manager shall observe boiler room for performance of Fireman's areas for cleanliness and proper lighting, as well as check the daily log for entries on DHW temperature readings. At this time, the Manager should log an entry in the Boiler Room logbook of their visit.

As needed

Fireman Responsibilities

The Fireman shall immediately report any problems to the Manager and/or Maintenance Superintendent, and the Heating Systems Coordinator/Inspector. In the event of very urgent or emergency problems, and the unavailability of the development staff, the Fireman shall report the problems directly to the ERS; the ERS staff or the dispatcher who answers the call after regulator hours will relay the message to the BHA Duty Officer.

Manager Responsibilities

The Manager shall inspect the distribution piping, fittings, and valves in the building basement for any sign of leaks or malfunctions.

The Manager shall work with the Heating System Coordinator and Inspector as needed to insure that maintenance is performed and repairs are made to the domestic hot system including the hot water storage tanks or instantaneous hot water heaters, heating coils, control valves, tempering valves, and the re-circulating pump etc.

The Manager shall work with the Maintenance Superintendent to insure that the storage tanks are drained and cleaned in summer, the maintenance is performed and repairs are made to the distribution piping and controls, and plumbing fixtures such as mixing valves inside the unit. The Manager shall make all decisions concerning major repairs to the domestic hot water distribution systems in the basement, underground, and inside the residential units. The Manager shall approve all purchase orders for stock, repair or replacement work, and annual preventive maintenance service as listed above.

The Manager has overall responsibilities for insuring that all the domestic hot water system maintenance and repair is completed properly and on time to insure service delivery to residents.

The Manager, with the assistance of the Heating Systems Coordinator and Inspector will work with the Project Manager or Architect to determine priorities of needed domestic hot water system improvements, select designers, develop designs and manage construction contracts for all major repair and replacement of domestic hot water systems and components.

30.6.3 Systems Inventory Information

The Development Centralized Domestic Hot Water Inventory & Specification sheet shall contain detailed specifications of the system's components including spare parts and shall be maintained in the Systems Inventory Book and updated as needed. The Inventory shall also include all daily; weekly, scheduled service checklist forms specific to the equipment & instrument at the site.

Centralized Domestic Hot Water Information Sheets shall be provided by the Heating Maintenance Unit for Family Developments and can be found in the S: FamEld Drive, *SOP Profile and Building Systems by Development* folder. This folder is organized into sub-folders for each development. Each Development sub-folder is further divided into folders for each system/component/structure subject to preventive maintenance. The Centralized Domestic Hot Water information sheets, specific to the systems located at your Development can be obtained from the Heating sub-folder within your Development folder.

See S: FamEld Drive, SOP Master Building Systems Appendices for sample master Centralized Domestic Hot Water inventory, specification and checklists forms if the Heating Maintenance Unit does not have this information specific to your Development

30.6.4 Service Records

Copies of all records of all Centralized Domestic Hot Water Systems preventive maintenance activities including all inspection checklists, services, regular testing and repairs etc will be filed in the annual Service Record Binder in the Heating Section.

Records of all preventive maintenance (P) work shall be filed in the annual Service Record Binder as well as the work order system files. Records of all preventive maintenance purchase orders shall be filed in the annual Service Record Binder as well as the purchase order system files.

All preventive maintenance activities must be included and tracked on your Annual Preventive Maintenance Plan – Schedule and Report form See S: FamEld Drive, SOP Master Building Systems Appendices for sample Annual PM Plan – Schedule and Report Form.

30.7 Electrically-Heated Developments

30.7.1 Objective

To supply resident with adequate heat and insure that parts and supplies are on hand to repair electric heating in the event of failure.

30.7.2 Scheduled Activities

Monthly/As Needed

Manager/Maintenance Superintendent Responsibilities

The Manager/Maintenance Superintendent is responsible for insuring that all electric heating components are in stock at all times. In particular, Managers should insure that the development is well stocked prior to the start of each heating season (September 15 of each year). Components include electric heat elements for baseboards (various sizes) and line voltage thermostats.

Annually

Manager's Responsibilities:

During the course of Living Unit Inspections, check all thermostats and heating units to insure that they are working properly. It will not be possible to check heating units for operation on hot days; however, this procedure should be followed on any day that the temperature allows. Heating units with broken or missing covers can create a fire hazard and should be replaced or repaired immediately.

30.7.3 Systems Inventory Information

An Electrical Heating Inventory and Specification sheet, including location and replacement/spare part information, shall be maintained in the Systems Inventory Book and updated as needed. Specification sheets should include all sizes and types of electric baseboard units with notations as to where each size/type is used (i.e. room of apartment). A site plan may be used to supplement this information and will be maintained in the Systems Inventory book. The Inventory shall also include all scheduled service checklist forms specific to the equipment at the site, as applicable. See S: FamEld Drive, SOP Master Building Systems Appendices for sample master Electrical Heating inventory, specification and checklists forms.

30.7.4 Service Records

Copies of all records of all Electrical Heating systems preventive maintenance activities including all inspection checklists, services, repairs etc will be filed in the annual Service Record Binder in the Heating Systems Section. Records of all preventive maintenance (P) work orders shall be filed in the annual Service Record Binder as well as the work order system files. Records of all preventive maintenance purchase orders shall be filed in the annual Service Record Binder as well as the purchase order system files.

All preventive maintenance activities must be included and tracked on your Annual Preventive Maintenance Plan – Schedule and Report form See S: FamEld Drive, SOP Master Building Systems Appendices for sample Annual PM Plan – Schedule and Report Form.

30.8 Fan Coil Unit inventory and Maintenance

30.8.1 Objective

To maintain all fan coil units in good working condition.

30.8.2 Scheduled Activities

Annually

Maintenance Superintendent/Manager/Electrician Responsibilities:

On an annual basis, during the off-heating season between May 15 and September 15, the in-house electrician shall check each fan coil unit following the procedure described below. It is the

manager/maintenance superintendent's responsibility to schedule this work. Additionally, the filters shall be changed at this time.

Maintenance Procedure:

- Inspect the unit for any signs of leaking and unusual odors
- Remove return grille and replace filter
- Clean grille if required
- Inspect the fan and clean
- Inspect the drain pan and clean.
- Check the condensate drain line to insure it is open and clear.

In elderly buildings changing filters may be assigned to the resident custodian. At this time he/she will check the general operation of the system, and if the motor is malfunctioning, the Electrician shall repair or replace as needed.

30.8.3 Systems Inventory Information

The Fan Coil Unit Inventory & Specification sheet shall contain detailed specifications of all units including replacement part information as necessary and shall be maintained in the Systems Inventory Book and updated as needed. The Inventory shall also include all scheduled service checklist forms specific to the equipment at the site, as applicable. The inventory will also include location information and a site map can be used to supplement this.

For Family Developments - Fan Coil Unit Information Sheets shall be provided by the Heating Maintenance Unit and can be found in the S: FamEld Drive, *SOP Profile and Building Systems by Development* folder. This folder is organized into sub-folders for each development. Each Development sub-folder is further divided into folders for each system/component/structure subject to preventive maintenance. The Fan Coil Unit Information Sheets, specific to the systems located at your Development can be obtained from the Heating sub-folder within your Development folder.

Elderly developments with fan coil units (Bellflower and Roslyn) need similar information. A hard copy should be kept in the Systems Inventory Binder. See S: FamEld Drive, SOP Master Building Systems Appendices for sample master Fan Coil Unit inventory, specification and checklists forms

30.8.4 Service Records

Copies of all records of all Fan Coil Units preventive maintenance activities including all inspection checklists, services, repairs etc will be filed in the annual Service Record Binder in the Heating Systems Section. Records of all preventive maintenance (P) work orders shall be filed in the annual Service Record Binder as well as the work order system files. Records of all preventive maintenance purchase orders shall be filed in the annual Service Record Binder as well as the purchase order system files.

All preventive maintenance activities must be included and tracked on your Annual Preventive Maintenance Plan – Schedule and Report form See S: FamEld Drive, SOP Master Building Systems Appendices for sample Annual PM Plan – Schedule and Report Form.

30.9 Condensate Return Pumps

30.9.1 Objective

To insure the continuous operation of all condensate return pumps through regular inspection and service, thereby insuring appropriate heat circulation, minimization of loss of energy and save water.

30.9.2 Scheduled Activities

Weekly

Steam fitter Responsibilities:

During the heating season, the Steamfitter shall complete a weekly inspection of all condensate return pumps using the Condensate Return Pump checklist. Any failure of a pump shall be immediately reported to the Maintenance Superintendent and work orders issued as appropriate to make all necessary repairs.

Each weekly inspection shall include:

1. Checking that the control (float switch) is in the automatic position
2. Watching the unit run through at least one complete cycle to check for proper operation
3. Checking for steam or water leaks, unusual odors or sounds.

Monthly

Maintenance Superintendent Responsibilities:

The Maintenance Superintendent shall accompany the Steamfitter on inspections at least once per month and note any problems during their walk-through to be addressed as part of routine maintenance or preventive maintenance.

30.9.3 Systems Inventory Information

The Condensate Return Pumps Inventory & Specification sheet shall contain detailed specifications of all units including replacement part information as necessary and shall be maintained in the Systems Inventory Book and updated as needed. The Inventory shall also include all scheduled service checklist forms specific to the equipment at the site, as applicable. The inventory will also include location information and a site map can be used to supplement this. See S: FamEld Drive, SOP Master Building Systems Appendices for sample master Condensate Return Pumps inventory, specification and checklists forms.

30.9.4 Service Records

Copies of all records of all Condensate Return Pumps preventive maintenance activities including all inspection checklists, services, repairs etc will be filed in the annual Service Record Binder in the Heating Systems Section. Records of all preventive maintenance (P) work orders shall be filed in the annual Service Record Binder as well as the work order system files. Records of all preventive maintenance purchase orders shall be filed in the annual Service Record Binder as well as the purchase order system files.

All preventive maintenance activities must be included and tracked on your Annual Preventive Maintenance Plan – Schedule and Report form See S: FamEld Drive, SOP Master Building Systems Appendices for sample Annual PM Plan – Schedule and Report Form.

30.10 Steam Trap Cyclical Replacement Program

30.10.1 Objective

To replace every steam trap on a five-year cycle during the off-heating season to insure the efficient and quite delivery of steam heat. Steam traps have a useful life of no more than 8 years, but usually less. This program is intended to replace traps prior to failure.

30.10.2 Scheduled Activities

One Time

Manager/Maintenance Superintendent Responsibilities:

As a start up activity, where this does not exist², each Manager/Maintenance Superintendent shall supervise the Steamfitter in the completion of a steam trap survey covering the entire development. The Manager/Maintenance Superintendent shall request the assistance of the Heating Systems Coordinator or Inspector in carrying out this task if required.

The purpose of the survey shall be to compile information on the number, size, type, and location of all development steam traps. As a general matter, in most developments, apartment steam traps are located at each heating unit and a survey of a representative sample of traps will be sufficient. All basements, boiler rooms, and other common area spaces will have to be specifically surveyed to identify each steam trap separately.

Following the survey, the Manager/Maintenance Superintendent shall develop a schedule for replacement of 20% of all steam traps each year. In general, this replacement program will begin in the common areas of the development, as the largest steam traps will be found in these spaces. However, if these have been recently replaced, the Manager/Maintenance Superintendent may decide to start in apartments.

The schedule shall reflect replacement of all steam traps in a five-year period starting with common areas steam traps in year one and one quarter of all apartments in year 2, 3, 4 and 5. . Once one cycle has been completed, the cycle will begin again.

Annually

Manager/Maintenance Superintendent Responsibilities:

Each year the Manager shall order adequate steam traps for the replacement cycle that will occur over that summer. Since some traps will be rebuilt each year, the Manager will determine the number of new traps which need to be purchased based on the stock of rebuilt traps available. For the first year, all traps will have to be purchased.

The Maintenance Superintendent shall develop a daily schedule of work to replace steam traps during the summer months. Work may begin prior to June 15 on warm days when the heating plant can be shut down. Work orders shall be created on a daily basis, using the priority code "P" to account for the steam fitters time.

The Manager shall coordinate the activity in apartments through notices to residents of the work being performed and 48-hour notices to enter.

Steam fitter Responsibilities:

The Steamfitter shall systematically replace all steam traps as scheduled. Old steam traps shall be removed and stored in an appropriate maintenance shop area for refitting during winter months. These refitted traps shall be used as spares and for the next annual cycle of steam trap replacement.

30.10.3 Systems Inventory Information

The Steam Trap Inventory & Specification sheet must include information on type; size of all traps with summary information for apartments as well as replacement part information and shall be maintained in the Systems Inventory Book and updated as needed. The Inventory shall also include all checklists for replacement dates and this information updated as work is completed. See S: FamEld Drive, SOP Master

² This program began in 1999 and this work should be complete.

Building Systems Appendices for sample master Steam Trap inventory, specification and checklists forms. A schedule for regular replacement of traps on a five-year cycle shall be included.

30.10.4 Service Records

Copies of all records of all Steam Trap preventive maintenance activities will be filed in the annual Service Record Binder in the Heating System Section. Each year, upon replacement of traps, the appropriate columns of the sheets shall be completed and included in Service Record Binder.

Records of all preventive maintenance (P) work orders [e.g. for all interim replacement of traps] shall be filed in the annual Service Record Binder as well as the work order system files. Records of all preventive maintenance purchase orders shall be filed in the annual Service Record Binder as well as the purchase order system files.

Finally notations of all interim replacement of traps shall be included on the Interim Trap Replacement log for reference when performing cyclical replacement activities so as not to duplicate work unnecessarily.

All preventive maintenance activities must be included and tracked on your Annual Preventive Maintenance Plan – Schedule and Report form See S: FamEld Drive, SOP Master Building Systems Appendices for sample Annual PM Plan – Schedule and Report Form.

30.11 System Temperature Controls Measures & Maintenance

30.11.1 Objective:

To insure continued, efficient, and reliable operation of a heating system, by maintaining functional temperature controls on boiler sequence controls, heating loop control valves, heating zone valves inside the building, self-contained control valve or manual inlet valve on heating fixture inside the apartment, and unit thermostat properly at all times.

30.11.2 Scheduled Activities

Twice Yearly

Manager/Maintenance Superintendent Responsibilities:

The development Manager and Maintenance Superintendent is responsible for the proper operation of heating zone valves inside the building, self-contained control valve or manual inlet valve on heating fixture inside the apartment, and unit thermostat.

Twice annually, in June and November, the Superintendent shall coordinate to have the zone valves inspected and serviced as necessary by BHA Mechanic or qualified contractor. Additionally, the Superintendent shall have at least one extra zone valve for each type/size on site, in case of an emergency replacement is needed.

Steam fitter/Contractor Responsibilities:

During the scheduled inspection and service period, the Steamfitter or contractor shall perform all necessary general maintenance to the zone valves including, but not limited to: inspecting valves for any visual defects and foreign objects, lubricating the valves, manually operating the valves (if applicable), "jumping" the connections to check the operation of the valves (if applicable). Any valve that is found to be defective must be replaced at this time.

As Needed

Heating Systems Coordinator/Inspector Responsibilities:

BHA Heating Dept. is responsible for the proper operation of boiler sequence controls and/or pump controls, and heating loop control valves inside the central boiler plant or boiler room.

The Heating System Coordinator & Inspector shall check the boiler controls and heating loop control valves during their regular boiler plant inspection for proper operation. Have the Burner Technicians check the outside temperature air sensors and replace them when needed, and fine-tune the boiler controls and set-points.

During their regular inspection, the Heating System Coordinator/Inspector shall visually inspect zone valves for operation and both external and internal leakage.

30.11.3 Systems Inventory Information

Systems Temperature Controls Inventory & Specification sheet must include information on all zone valves. Self-contained control valve or manual inlet on heating fixture inside the apartment, and unit thermostat as well as areas/locations and replacement part information and shall be maintained in the Systems Inventory Book and updated as needed. The Inventory shall also include all scheduled service checklist forms specific to the equipment at the site, as applicable. A site map can be used to supplement the location information if necessary. See S: FamEld Drive, SOP Master Building Systems Appendices for sample master Systems Temperature Controls inventory, specification and checklists forms

30.11.4 Service Records

Copies of all records of all system temperature controls preventive maintenance activities including all inspection checklists, services, repairs etc will be filed in the annual Service Record Binder in the Heating Systems Section. Records of all preventive maintenance (P) work orders shall be filed in the annual Service Record Binder as well as the work order system files. Records of all preventive maintenance purchase orders shall be filed in the annual Service Record Binder as well as the purchase order system files.

All preventive maintenance activities must be included and tracked on your Annual Preventive Maintenance Plan – Schedule and Report form See S: FamEld Drive, SOP Master Building Systems Appendices for sample Annual PM Plan – Schedule and Report Form.

30.12 Forced Warm Air and Heat Pumps System & Maintenance/52 Chauncy Street

30.12.1 Objective

To insure the continued efficient operation of the 52 Chauncy Street heating system, by insuring that all temperature controls are functioning properly at all times.

30.12.2 Scheduled Activities

Twice Annually

Maintenance Superintendent/Building Manager Responsibilities:

Twice annually, in June and November, the Superintendent shall coordinate to have the zone valves inspected and serviced as necessary by a BHA Mechanic or qualified contractor. Additionally, the Superintendent shall have at least one extra zone valve on site, in case of an emergency replacement is needed.

Steam fitter/Contractor Responsibilities:

During the scheduled inspection and service period, the Steam fitter or contractor shall perform all necessary general maintenance to the zone valves including, but not limited to: inspecting valves for any visual defects and foreign objects, lubricating the valves, manually operating the valves (if applicable), "jumping" the connections to check the operation of the valves (if applicable). Any valve that is found to be defective must be replaced at this time.

As needed

Heating Systems Coordinator/Inspector Responsibilities:

During the walk through, the Heating System Coordinator/Inspector shall visually inspect zone valves, and shall check the service loose-leaf binder to insure that the necessary work has been completed.

30.12.3 Systems Inventory Information

Forced Warm Air and Heat Pumps Systems Inventory & Specification sheet must include information on all zone valves, including location and replacement part information and shall be maintained in the systems Inventory Book and updated as needed. The Inventory shall also include all scheduled service checklist forms specific to the equipment at the site, as applicable. A site map can be used to supplement the location information if necessary. See S: FamEld Drive, SOP Master Building Systems Appendices for sample master Forced Warm Air and Heat Pumps Systems inventory, specification and checklists forms

30.12.4 Service Records

Copies of all records of all Forced Warm Air and Heat Pumps preventive maintenance activities including all inspection checklists, services, repairs etc will be filed in the annual Service Record Binder in the Heating Systems Section. Records of all preventive maintenance (P) work orders shall be filed in the annual Service Record Binder as well as the work order system files. Records of all preventive maintenance purchase orders shall be filed in the annual Service Record Binder as well as the purchase order system files.

All preventive maintenance activities must be included and tracked on your Annual Preventive Maintenance Plan – Schedule and Report form See S: FamEld Drive, SOP Master Building Systems Appendices for sample Annual PM Plan – Schedule and Report Form.

30.13 Fuel Oil Consumption and Ordering Policy

30.13.1 Objective

To insure the continued efficient operation of an oil-fired heating system, by insuring consistent delivery of heating oil, monitoring fuel consumption, and providing reliable heat and/or hot water to residents.

30.13.2 Scheduled Activities:

Daily

Firemen Responsibilities:

During heating season [September 15th – May 15th], each morning, the Fireman must dip the oil tank and take a reading and record in boiler room logbook. During off-heating season [May 16th – September 14th]; the Fireman must dip the oil tank and take a reading and record in boiler room logbook at least once a week. The Fireman shall call this reading to the Maintenance Superintendent who will order oil as needed. Prior to and after receiving an oil delivery, the Fireman must dip the tank to insure that the appropriate amount of oil requested was delivered, and to minimize the potential hazard of any oil spillage due to over filling of an oil tank.

Fireman shall monitor the fuel oil circulating pumps for proper operation and visual inspect the fuel oil pumps, filters/strainers, and burners for any sign of leakage and respond to it properly.

Fireman is responsible to monitor the fuel oil consumption and report to the Heating System Coordinator or Inspector immediately for any drastic volume change in the storage tanks.

Weekly

Fireman Responsibilities

Fireman shall alternate the fuel oil circulating pumps and strainers/filters once a week and clean the strainers/filter elements immediately ready for use again.

As Needed

Firemen/Maintenance Superintendent Responsibilities:

The Fireman or Maintenance Superintendent shall be responsible for obtaining delivery slips from the deliverer and giving them to the Manager for immediate submission to the Accounts Payable Department. Oil may be ordered any working day.

Manager Responsibilities:

As oil delivery slips/receipts are provided, and each month, as the oil usage forms are submitted, the Manager must review these forms and submit them in a timely manner to the appropriate departments for processing.

30.13.3 Systems Inventory Information

Oil Fire Heating Systems Inventory & Specification sheet, including information on fuel type [oil must be specified as #2, #4 or #6] location and replacement part information shall be maintained in the systems Inventory Book and updated as needed. The Inventory shall also include all scheduled service checklist forms specific to the equipment at the site, as applicable. A site map can be used to supplement the location information if necessary. See S: FamEld Drive, SOP Master Building Systems Appendices for sample master Oil Fire Heating Systems inventory, specification and checklists forms.

30.13.4 Service Records

Copies of all records of oil-fired heating system preventive maintenance activities including all inspection checklists, services, repairs etc will be filed in the annual Service Record Binder in the Heating Systems Section. Records of all preventive maintenance (P) work orders shall be filed in the annual Service Record Binder as well as the work order system files. Records of all preventive maintenance purchase orders shall be filed in the annual Service Record Binder as well as the purchase order system files

All preventive maintenance activities must be included and tracked on your Annual Preventive Maintenance Plan – Schedule and Report form See S: FamEld Drive, SOP Master Building Systems Appendices for sample Annual PM Plan – Schedule and Report Form.

All copies of oil delivery slips/receipts shall be maintained in the development's purchasing filing system. All monthly oil usage forms shall be maintained in the Service Record binder, in chronological order.

Chapter 31 Plumbing

31.1 Water Distribution System - Inspection and Service Procedures

31.1.1 Objective:

To insure that the plumbing distribution system is operating properly and is maintained in accordance with applicable ordinances and codes.

31.1.2 Scheduled Activities:

Monthly

Manager/Maintenance Superintendent Responsibilities:

Each month, the Manager/ Maintenance Superintendent shall conduct a general inspection of the plumbing distribution system. This inspection should include, but not be limited to: visual inspections for leaks, location of water shut-off valves, broken or missing valve handles.

Annually

Manager Responsibilities:

Each year during the living unit inspection cycle, the manager should observe the conditions of plumbing fixtures, caulking, grout, and any visual leaks that may be originating from another location. These conditions should be noted on the living unit inspection form and processed to issue work orders to be completed by the appropriate staff. Hot water temperature must be tested and recorded.

Plumber Responsibilities:

Each year, the Plumber shall conduct a test of all main valves to insure their operation. This should include all building main valves, as well as, all hot and cold riser valves. This test should include, but not be limited to lubricating the valve, operating the valve back 1/4 turn, and checking for leaks.

31.1.3 Systems Inventory Information:

Water Distribution System Inventory & Specification sheet, including information on all valves, their location and replacement parts shall be maintained in the Systems Inventory Book and updated as needed. The Inventory shall also include all scheduled service checklist forms specific to the equipment at the site, as applicable. The Maintenance Superintendent shall coordinate with the Plumber and steam fitter tagging of all valves. Once all valves have been identified and tagged the inventory and PM maintenance checklist shall be completed with the tag number all the valves, and a description of the valves. A site map can be used to supplement the location information if necessary. See S: FamEld Drive, SOP Master Building Systems Appendices for sample master Water Distribution system inventory, specification and checklists forms.

31.1.4 Service Records:

Copies of all records of Water Distribution system preventive maintenance activities including all inspection checklists, services, repairs etc shall be filed in the annual Service Record Binder in the Plumbing Section. Records of all preventive maintenance (P) work orders shall be filed in the annual Service Record Binder as well as the work order system files. Records of all preventive maintenance purchase orders shall be filed in the annual Service Record Binder as well as the purchase order system files

All preventive maintenance activities must be included and tracked on your Annual Preventive Maintenance Plan – Schedule and Report form See S: FamEld Drive, SOP Master Building Systems Appendices for sample Annual PM Plan – Schedule and Report Form.

31.2 Drain Cleaning

31.2.1 Objective:

To insure that main horizontal and roof drains flow adequately within dwelling buildings and out to the street. In addition, to insure adequate site drainage by insuring that all dry wells are clear and not clogged and that street storm water systems are not blocked.

31.2.2 Scheduled Activities:

Annually

Manager/Maintenance Superintendent Responsibilities:

Once a year, the Manager/Superintendent shall arrange for the plumber to open each basement clean out and check the flow of waste water. Any drains which are flowing slowly shall be routed out by machine (contractor or in-house).

As needed/where needed

Manager/Maintenance Superintendent Responsibilities:

The Manager/Superintendent shall maintain a list of problem drains and have them cleaned regularly to help prevent back ups. The frequency of each clean out schedule shall depend upon the nature and scope of the problem. For site drainage, the manager/super shall arrange to have clogged dry wells cleaned out in-house or by a contractor to insure that water does not pond on the site after rain storms. Any clogged street drain may be cleaned by laborers/JGs if the clog is on the surface or the City may be called. See Roofing, Chapter 33, for information on roof drains.

In-house Plumber Responsibilities:

In between scheduled cleaning of drains, if a problem arises, a work order shall be issued and an in-house plumber will service as needed by use of a drain machine.

31.2.3 Systems Inventory Information:

The Drain Inventory & Specification sheet must include information on all main-drains, storm lines and dry wells used for site drainage, including location information and shall be maintained in the Systems Inventory Book and updated as needed. A site map can be used to supplement the location information if applicable. The Inventory shall also include a master inspection and service checklist specific to the drains at the site and a list of those drains needing regular scheduled clean-outs. See S: FamEld Drive, SOP Master Building Systems Appendices for sample master Drain inventory, specification and checklists forms.

31.2.4 Service Records:

Copies of all records of all drain preventive maintenance activities including all inspection and service checklists, repairs etc will be filed in the annual Service Record Binder in the Plumbing Section. Records of all preventive maintenance (P) work orders shall be filed in the annual Service Record Binder as well as the work order system files. Records of all preventive maintenance purchase orders shall be filed in the annual Service Record Binder as well as the purchase order system files

All preventive maintenance activities must be included and tracked on your Annual Preventive Maintenance Plan – Schedule and Report form See S: FamEld Drive, SOP Master Building Systems Appendices for sample Annual PM Plan – Schedule and Report Form.

31.3 Back Flow Prevention

31.3.1 Objective:

To insure that the back flow device is operating properly and is maintained in accordance with applicable ordinances and codes.

31.3.2 Scheduled Activities:

Annually

Manager / Maintenance Superintendent Responsibilities:

The Manager/Maintenance Superintendent shall coordinate the annual inspection of back flow preventers by the Boston Water and Sewer Commission by being available on the scheduled inspection date to accompany the inspectors. Any deficiencies in the back flow preventer must be completed immediately. Managers are responsible for maintaining at least one repair kit on hand at all times in the event that one needs to be repaired on an emergency basis.

Boston Water and Sewer Responsibilities:

Annually, the Boston Water and Sewer Commission will perform a back flow inspection and submit a copy of the results to the manager.

31.3.3 Systems Inventory Information:

The Back Flow Device Inventory & Specification sheet must include information on all back flow preventers, including location information and the system to which they are related and shall be maintained in the Systems Inventory Book and updated as needed. A site map can be used to supplement the location information if applicable. The Inventory shall also include a master inspection and service checklist specific to the back flow devices at the site and a list of those drains needing regular scheduled clean-outs. See S: FamEld Drive, SOP Master Building Systems Appendices for sample master Back Flow device inventory, specification and checklists forms.

31.3.4 Service Records:

Copies of all records of all back flow device preventive maintenance activities including all inspection checklists, services, repairs etc will be filed in the annual Service Record Binder in the Plumbing Section. Records of all preventive maintenance (P) work orders shall be filed in the annual Service Record Binder as well as the work order system files. Records of all preventive maintenance purchase orders shall be filed in the annual Service Record Binder as well as the purchase order system files.

All preventive maintenance activities must be included and tracked on your Annual Preventive Maintenance Plan – Schedule and Report form See S: FamEld Drive, SOP Master Building Systems Appendices for sample Annual PM Plan – Schedule and Report Form.

31.4 Domestic Hot Water System

31.4.1 Objective:

To insure that the domestic hot water system is operating properly and is maintained in accordance with applicable ordinances and codes.

31.4.2 Scheduled Activities:

Monthly

Plumber Responsibilities:

Each month, the plumber shall perform a general inspection of the domestic hot water system and perform a discharge temperature check. The Plumber shall record its reading on the "Domestic Hot Water Chart" a master copy can be obtained in the S: FamEld Drive, SOP Master Building Systems Appendices. Any problems discovered at the time of the inspection must be corrected at that time.

Annually

Manager/Superintendent Responsibilities

Each year during the living unit inspection, the manager shall perform a hot water check in every unit and note the temperature on the living unit inspection form. Per Massachusetts Sanitary Code, water temperature must not be less than 110 degrees (F), and exceed no greater than 130 degrees (F). On an annual basis, the Manager/Superintendent shall arrange to have a plumber drain and flush all DHW storage tanks including stand-alone DHW heaters.

Every Three Years

Manager/Superintendent Responsibilities

Once every three years, the superintendent shall arrange for the plumber to open and inspect any DHW heater/storage tank over 120 gallons.

As needed

Manager/Maintenance Superintendent Responsibilities:

If between scheduled DHW inspections, the system were to malfunction, the manager and/or maintenance superintendent shall issue a work order and/or purchase requisition to have the in-house plumber or contractor make the necessary repairs to the system. In the event that an in-house plumber is used, all required stock necessary to maintain the system should be kept on inventory.

31.4.3 Systems Inventory Information

The Domestic Hot Water System Inventory & Specification sheet must include information on all DHW Heaters, storage tanks and circulating pumps, including location information and shall be maintained in the Systems Inventory Book and updated as needed. A site map can be used to supplement the location information if applicable. The Inventory shall also include a master inspection and service checklist specific to the system at the site. See S: FamEld Drive, SOP Master Building Systems Appendices for sample master Domestic Hot Water System inventory, specification and checklists forms.

31.4.4 Service Records

Copies of all records of all Domestic Hot Water system preventive maintenance activities including all inspection/service checklists, repairs etc will be filed in the annual Service Record Binder in the Plumbing Section. Records of all preventive maintenance (P) work orders shall be filed in the annual Service Record Binder as well as the work order system files. Records of all preventive maintenance purchase orders shall be filed in the annual Service Record Binder as well as the purchase order system files. All preventive maintenance activities must be included and tracked on your Annual Preventive Maintenance Plan – Schedule and Report form.

Chapter 32 Ventilation and Air Conditioning

32.1 Window Air Conditioning Units / BHA owned

32.1.1 Objective:

To insure the correct operation of all BHA owned window air conditioning units used to cool management, community and maintenance spaces during summer months.

32.1.2 Scheduled Activities:

As Needed

Managers/Maintenance Superintendents Responsibilities

Managers must keep spare filters on hand and respond to any problems with the units through purchase orders to contractors or issuance of work orders for repairs.

Annually

Maintenance Superintendent Responsibilities:

The Superintendent shall insure that the following tasks are complete each year by appropriate staff:

- During the month of May, each year, clean and/or change filter in the unit. For filters, which are washable, remove filter, wash thoroughly under a sink, dry, and replace in the unit. For units with disposable filters, remove old filter and replace with a new filter.
- At the same time, run the unit to test its operation. If there are any problems with the unit, report them to the manager for correction.
- Where practical, remove units from the windows on October 1 of each year, and store in a dry area, on a level surface. Where this is not practical, seal the units with an appropriate cover to prohibit air infiltration in the winter. Units should be returned to the window no later than June 1.

32.1.3 Systems Inventory Information

The Ventilation and Air Conditioning Inventory & Specification sheet must include information on all window air conditioner units, including all filters and other spare parts information, location information and shall be maintained in the Systems Inventory Book and updated as needed. A site map can be used to supplement the location information if necessary. The Inventory shall also include a master inspection and service checklist specific to the units at the site. See S: FamEld Drive, SOP Master Building Systems Appendices for sample master Ventilation and Air Conditioning inventory, specification and checklists forms.

32.1.4 Service Records

Copies of all records of all Ventilation and Air Conditioning preventive maintenance activities including all inspection checklists, services [including annual filter changing and testing of the unit by the resident custodian], repairs etc will be filed in the annual Service Record Binder in the appropriate Section. Records of all preventive maintenance (P) work orders shall be filed in the annual Service Record Binder as well as the work order system files. Records of all preventive maintenance purchase orders shall be filed in the annual Service Record Binder as well as the purchase order system files. All preventive maintenance activities must be included and tracked on your Annual Preventive Maintenance Plan – Schedule and Report form See S: FamEld Drive, SOP Master Building Systems Appendices for sample Annual PM Plan – Schedule and Report Form. Contractor service calls should indicate the work performed.

32.2 Roof Top Exhaust Fans

32.2.1 Objective:

To insure continuous operation of all roof top exhaust fans and to limit repair and service calls.

32.2.2 Scheduled Activities:

Weekly/Quarterly

Manager/Maintenance Superintendent's Responsibilities:

To check the operation of rooftop fans at each Building and Grounds Inspection and to issue work orders or place purchase orders to repair any inoperable units.

Annually

Maintenance Superintendent Responsibilities:

To schedule annual preventive maintenance of all roof top fans by a qualified electrician. These scheduled preventive maintenance visits should occur during the period from April through September.

32.2.3 Systems Inventory Information

The Roof Top Exhaust Fan Inventory & Specification sheet must include location and spare part information and shall be maintained in the Systems Inventory Book and updated as needed. A site map can be used to supplement the location information if necessary. The Inventory shall also include a master inspection and service checklist specific to the system at the site. See S: FamEld Drive, SOP Master Building Systems Appendices for sample master Roof Top Exhaust Fan inventory, specification and checklists forms.

32.2.4 Service Records

Copies of all records of all Roof Top Exhaust Fan preventive maintenance activities including all inspection checklists, services, repairs etc will be filed in the annual Service Record Binder in the appropriate Section. Records of all preventive maintenance (P) work orders shall be filed in the annual Service Record Binder as well as the work order system files. Records of all preventive maintenance purchase orders shall be filed in the annual Service Record Binder as well as the purchase order system files.

All preventive maintenance activities must be included and tracked on your Annual Preventive Maintenance Plan – Schedule and Report form See S: FamEld Drive, SOP Master Building Systems Appendices for sample Annual PM Plan – Schedule and Report Form.

32.3 Boiler Room Make-up Air Units

32.3.1 Objective:

To insure the continuous operation of all make-up air units (fans) and related equipment.

32.3.2 Scheduled Activities:

Annually

Firemen Responsibilities:

On an annual basis, the Fireman shall change filters and clean the coils in the air handling units to insure clean and adequate airflow. As needed, more frequent cleanings of the coils may be required.

Manager/Maintenance Superintendent Responsibilities:

The manager shall insure that annual preventive maintenance of all central air handling units is completed by a BHA mechanic or by a qualified contractor using a purchase order. See S: FamEld Drive Master Building Systems Appendices for annual preventive maintenance checklists.

As Needed

Fireman Responsibilities:

As needed, the Fireman shall assure that there are no cleaning supplies, solvents, or other odor or out-gas producing materials stored adjacent to ventilation equipment.

Manager Responsibilities:

To make all repairs as needed through issuance of a work order or purchase order as needed. To maintain stock on hand for all filters required.

32.3.3 Systems Inventory Information

The Boiler Room Make-up Air Unit Inventory & Specification sheet must include information on type and size of filters, if required, location and spare part information and shall be maintained in the Systems Inventory Book and updated as needed. A site map can be used to supplement the location information if necessary. The Inventory shall also include a master inspection and service checklist specific to the system at the site. See S: FamEld Drive, SOP Master Building Systems Appendices for sample master Boiler Room Make-up Air Unit inventory, specification and checklists forms.

32.3.4 Service Records

Copies of all records of all Boiler Room Make-up Air Unit preventive maintenance activities including all inspection checklists, services, repairs etc will be filed in the annual Service Record Binder in the appropriate Section. Records of all preventive maintenance (P) work orders shall be filed in the annual Service Record Binder as well as the work order system files. Records of all preventive maintenance purchase orders shall be filed in the annual Service Record Binder as well as the purchase order system files.

All preventive maintenance activities must be included and tracked on your Annual Preventive Maintenance Plan – Schedule and Report form See S: FamEld Drive, SOP Master Building Systems Appendices for sample Annual PM Plan – Schedule and Report Form.

32.4 Air Handling Units/Common Area Ventilation

32.4.1 Objective:

To insure the continuous operation of all air handling units (fans) and related equipment.

32.4.2 Scheduled Activities:

Weekly/Quarterly/As Needed

Management Staff/Custodians/Laborers/Janitor Groundskeepers Responsibilities:

As part of weekly and quarterly building walk-through inspections, staff shall insure that there is no cleaning supplies, solvents, or other odor or out-gas producing materials stored adjacent to ventilation equipment.

Manager Responsibilities:

To make all repairs as needed through issuance of a work order or purchase order and to maintain stock on hand for all filters required.

Annually

Manager/Maintenance Superintendent Responsibilities:

The manager shall insure that annual preventive maintenance of all central air handling units is completed by a BHA mechanic or by a qualified contractor using a purchase order. This shall include changing filters and cleaning coils.

32.4.3 Systems Inventory Information

An Air Handling Units/Common Area Ventilation Inventory & Specification sheet including information on type and size of filters, if required, location and spare part information shall be maintained in the Systems Inventory Book and updated as needed. A site map can be used to supplement the location information if necessary. The Inventory shall also include a master inspection and service checklist specific to the system at the site. See S: FamEld Drive, SOP Master Building Systems Appendices for sample master Air Handling Units/Common Area Ventilation inventory, specification and checklists forms.

32.4.4 Service Records

Copies of all records of all Air Handling Units/Common Area Ventilation preventive maintenance activities including all inspection checklists, services, repairs etc will be filed in the annual Service Record Binder in the appropriate Section. Records of all preventive maintenance (P) work orders shall be filed in the annual Service Record Binder as well as the work order system files. Records of all preventive maintenance purchase orders shall be filed in the annual Service Record Binder as well as the purchase order system files.

All preventive maintenance activities must be included and tracked on your Annual Preventive Maintenance Plan – Schedule and Report form See S: FamEld Drive, SOP Master Building Systems Appendices for sample Annual PM Plan – Schedule and Report Form.

32.5 Split System Air conditioning Systems and Heat Pumps

32.5.1 Objective:

To insure the proper operation and maintenance of split system air conditioning systems and heat pump units. These are generally located in Elderly developments to cool and heat common areas.

32.5.2 Scheduled Activities:

Weekly/Quarterly

Manager/Maintenance Superintendent Responsibilities

The manager shall inspect all components of split system air conditioning systems/heat pump units for obvious signs of damage during each weekly and quarterly building and grounds inspection.

Annually/ twice yearly

Manager/Maintenance Superintendent Responsibilities

The manager shall issue a Purchase Order at least once each year, during the period from April to May, for annual preventive maintenance services on the split system air conditioning system /heat pump unit to a qualified contractor. Managers may determine that twice annual service is required, particularly if the unit runs both heat and air conditioning, in which case service Purchase Orders should additionally be issued in the fall of each year.

As Needed

Manager/Maintenance Superintendent Responsibilities

The maintenance superintendent/manager shall insure repair of split system air conditioning and heat pump units on an as needed basis.

32.5.3 Systems Inventory Information

A Split system air conditioning systems and Heat pump units Inventory & Specification sheet, including location and spare part information shall be maintained in the Systems Inventory Book and updated as needed. A site map can be used to supplement the location information if necessary. The Inventory shall also include a master inspection and service checklist specific to the systems at the site. See S: FamEld Drive, SOP Master Building Systems Appendices for sample master split system air conditioning systems and heat pump unit's inventory, specification and checklists forms.

32.5.4 Service Records

Copies of all records of all Split system air conditioning systems and Heat pump units' preventive maintenance activities including all inspection checklists, services, repairs etc will be filed in the annual Service Record Binder in the appropriate Section. Records of all preventive maintenance (P) work orders shall be filed in the annual Service Record Binder as well as the work order system files. Records of all preventive maintenance purchase orders shall be filed in the annual Service Record Binder as well as the purchase order system files.

All preventive maintenance activities must be included and tracked on your Annual Preventive Maintenance Plan – Schedule and Report form See S: FamEld Drive, SOP Master Building Systems Appendices for sample Annual PM Plan – Schedule and Report Form.

Chapter 33 Roofs

33.1 Flat Roofs

33.1.1 Objective:

To identify necessary maintenance, repair and replacement of building roofs, minimize damage to facilities resulting from faulty roofing and to inspect and maintain new roof work.

33.1.2 Scheduled Activities:

Weekly/Quarterly

Laborers/JGs/Custodians/Manager Maintenance Superintendent Responsibilities

Check roofs for obvious problems during all weekly walk-through inspections, and carefully inspect roofs during the quarterly Buildings and Grounds Inspections. Make all access to roofs secure, including doors and windows. Direct staff in any clean up activities required, write work orders for any repairs needed, insure that work orders are completed by the staff or contractors. Report major problems to the Service Programs Coordinator for correction.

Quarterly

At least once per quarter, this inspection should take place during or immediately following a rainstorm.

Flat Roof inspections shall include checking for:

1. Clogged drains and/or standing water.
2. Drain caps in place/strainers in place and unbroken
3. Debris requiring removal
4. Unauthorized equipment attached to the roof requiring removal
5. Condition of penthouse doors and windows/hatch
6. Problems with exhaust fans
7. Signs of flashing or parapet wall disrepair
8. Vegetation, tree growth at roof edge or above
9. Any other obvious problem or defect

Annually

Roofing Crew Responsibilities:

The Roofing Crew shall perform an annual inspection of all roofs and submit a report to the Manager. This report should be maintained in the Preventive Maintenance Service Record Book and any corrective actions needed should be coordinated by the Manager. Roof materials must be consistent and compatible with the current roofing system.

33.1.3 Systems Inventory Information

A Roof Inventory & Specification sheet including date of installation, warranty and material specification information and location information shall be maintained in the Systems Inventory Book and updated as needed. A site map can be used to supplement the location information if necessary. The Inventory shall also include a master inspection and service checklist specific to the system at the site. See S: FamEld Drive, SOP Master Building Systems Appendices for sample master Roof inventory, specification and checklists forms.

33.1.4 Service Records

Copies of all records of all roof preventive maintenance activities including all inspection and services checklists, repairs etc will be filed in the annual Service Record Binder in the Roofing Section. Records of all preventive maintenance (P) work orders shall be filed in the annual Service Record Binder as well as the work order system files. Records of all preventive maintenance purchase orders shall be filed in the annual Service Record Binder as well as the purchase order system files.

All preventive maintenance activities must be included and tracked on your Annual Preventive Maintenance Plan – Schedule and Report form See S: FamEld Drive, SOP Master Building Systems Appendices for sample Annual PM Plan – Schedule and Report Form.

33.2 Pitched Roofs

33.2.1 Objective:

To identify necessary maintenance, repair and replacement of building roofs to minimize damage to facilities resulting from faulty roofing.

33.2.2 Scheduled Activities:

Weekly/Quarterly

Managers/Maintenance Superintendent Responsibilities:

Roofs should be checked for obvious problems during all weekly walk-through inspections, and carefully inspect roofs during the quarterly Buildings and Grounds Inspections. Direct staff in any activities required, write work orders for any repairs needed, insure that work orders are completed by the staff or contractors. Report major problems to the service programs coordinator for correction.

Quarterly

At least once per quarter, this inspection should take place during or immediately following a rainstorm.

Pitched Roof inspections shall include checking for:

1. Clogged or damaged gutters and downspouts
2. Condition of the fascia board.
3. Condition of roof tiles/roofing materials
4. Unauthorized antennas/satellite dishes
5. Condition of flashing
6. Attic ventilation grills
7. Vegetation
8. Any other obvious problem or deficiency

Annually

Roofing Crew Responsibilities:

The Roofing Crew shall perform an annual inspection of all roofs and submit a report to the Manager. This report should be maintained in the Preventive Maintenance Service Record Book and any corrective actions needed should be coordinated by the Manager.

33.2.3 Systems Inventory Information

A Roof Inventory & Specification sheet including date of installation, warranty and material specification information and location information shall be maintained in the Systems Inventory Book and updated as needed. A site map can be used to supplement the location information if necessary. The Inventory shall also include a master inspection and service checklist specific to the system at the site. See S: FamEld

Drive, SOP Master Building Systems Appendices for sample master Roof inventory, specification and checklists forms.

33.2.4 Service Records

Copies of all records of all roof preventive maintenance activities including all inspection checklists, services, repairs etc will be filed in the annual Service Record Binder in the Roofing Section. Records of all preventive maintenance (P) work orders shall be filed in the annual Service Record Binder as well as the work order system files. Records of all preventive maintenance purchase orders shall be filed in the annual Service Record Binder as well as the purchase order system files. All preventive maintenance activities must be included and tracked on your Annual Preventive Maintenance Plan – Schedule and Report form.

Chapter 34 Small Engine Equipment, Power Tools and Skid Steer Loaders

34.1 Small Engine Equipment and Power Tools

34.1.1 Objective:

To keep all BHA small engine equipment [lawn mowers; lawn tractors; hedge trimmers; weed trimmers; chainsaws; leaf blowers; leaf vacuums; power edgers; power pole pruners; snow blowers; power brooms/sweepers; drain machines; generators etc] and power tools [drills; planers; saws; grinders; screw guns; chipping hammers; cutting torch etc] in prime working condition. To insure long life, safety of operation, availability at all times needed and to limit the cost for repairs and replacements.

34.1.2 Scheduled Activities for Operation and maintenance of Small Equipment

On –going

Equipment Operator's Responsibilities:

Small Engine Equipment and Power Tools may not be left unattended by Operator when in use. Staff shall be held responsible for equipment stolen due to failure to adhere to this policy. Each employee is responsible for the equipment or tool they are using. The employee should check their equipment at the start of the job and must report any problem immediately. If the employee encounters any problems during the workday with a tool or equipment this also must be reported to a supervisor immediately.

Manager/Maintenance Superintendents Responsibilities:

Manager/Superintendents shall insure that all employees operating any piece of equipment are given copies of the manufacturer's specifications on usage and care of all power tool or small engine equipment that employee may be using. Equipment operators should understand the potential hazards as well as the safety precautions to prevent those hazards from occurring.

It is the supervisor's responsibility to secure all small equipment in proper storage locations when not in use. Run gas out first if storage is in an occupied building. Small Engine Equipment should be kept in a secured area. All hand power tools must be kept in a locked gang box at the end of each work day. All tools and equipment must remain at the development they are assigned. Any employee that removes a tool or equipment for their personal use will be subjected to disciplinary action. Any tool which is shared by more than one employee shall be kept in a central, secure location and a sign out/sign in system will be used; each employee using this equipment must sign it out. All small engine equipment and power tools that are damaged shall be removed from use and tagged "**Do Not Use.**"

Annually

Manager/Maintenance Superintendents Responsibilities:

Managers/Superintendents shall insure that all employees using equipment are properly trained. The Risk Management Department in conjunction with the Operations Department provides annual training in Small Engine Equipment – Safety & Maintenance. The training program is scheduled in April annually. All employees using small engine equipment must attend this annual training. For new employees, superintendents can contact the Risk Manager to schedule a training session, if employee commences work after the April Training Session.

The Manager/ Maintenance Superintendent shall be responsible for issuing purchase orders to reputable small equipment service companies for annual service and tune-ups to all small engine equipment. All snow removal equipment must be serviced between April and October each year and newly serviced snow

removal equipment must be on site before November 1 of each year. Landscape power equipment must be serviced between November 1 and April 1 of each year, but no later than April 15.

34.1.3 Servicing Small Engine Equipment

See Public Folders P-drive, SOP Appendices folder for a listing of recommended small engine equipment service companies [or Contact the Procurement Department] that you can contact for quotes when seeking bids for service/repair work [this listing may be updated at any time]. The manager/superintendent shall maintain records of all service to small engine equipment and power tools in the annual Service Records binder.

34.1.4 Purchasing New Equipment

The Manager/Maintenance Superintendent shall be responsible for seeking quotes and issuing purchase orders to reputable small equipment vendors to procure new equipment as needed. The Risk Manager in conjunction with the Landscape Management Coordinator has developed a listing of approved items and specifications for landscape small engine equipment to be utilized when purchasing new equipment. See Public Folders P-drive, SOP Appendices folder for a listing of approved items and a listing of small engine equipment Vendors or contact the Procurement Department. [This listing maybe updated at anytime.

34.1.5 Small Engine Equipment & Power Tools - Safe Operation & Maintenance Policies:

It is the responsibility of the superintendent to make sure that all staff operating small engine equipment and power tools is following all proper maintenance and safety policy and procedures as outlined in the equipment/tool manufacturer's manuals. General small engine equipment safety and maintenance guidelines for equipment operators are outlined below to supplement the equipment/tool manufacturer's manual and located in the appendix as a checklist form.

Superintendents and operators need to know and understand all small engine equipment and power tools. Superintendents and operators must read and understand the owner's manual and labels affixed to the tool. Learn its application and limitations as well as the specific potential hazards peculiar to this equipment/tool. Equipment operator must check all equipment:

- For noticeable defects and damage.
- To insure the gas tank is full
- To make sure when using two-stage equipment such as weed trimmers and leaf blowers that the machines are using the proper Gas/Oil Mix. (Bluish color).
- If using an electric power tool, check extension cord for any damage.
- Make sure all safety devices are in place and in proper working order including safety shields on snow blowers and plastic shields on weed trimmers.
- Check lawnmower blades for noticeable chunks and divots missing.
- When using weed trimmer check head to make sure it is secure and has proper amount of line.

34.1.6 Rules for Safe Operation of Small Engine Equipment and Power Tools

All equipment operators must follow strict safety requirements:

- Small engine equipment operators must walk the work area and remove any foreign objects – glass; bottles; large rocks; trash and any other item that may cause injury to the operator before using the equipment.
- Operators must never Start-Up and/or Operate small engine equipment indoors.
- Equipment Operators must put on safety glasses when operating any small engine equipment or power tool.

- Equipment operator must use hearing protection when appropriate E.g. when using power equipment such as leaf blowers; weed trimmers and chainsaws.
- Power tool operators must not expose electric power tools to rain.
- Power tool operators must not use electric power tools in damp or wet location or in the presence of flammable fluids or gases.
- Electric tools should be operated within their design limitations. Use the right tool for the job!
- All work areas should be well lit.
- Equipment/Tool operator must watch what he/she is at all times doing.
- Never overreach – keep proper footing and balance at all times.
- Dress properly – do not wear loose clothing or jewelry when operating equipment as they can get caught in moving parts.
- Power tool operators must disconnect tool from power source when not in use, before servicing or changing parts etc.
- Keep guards in place, in working order and in proper adjustment and alignment.
- Remove adjusting keys and wrenches when not in use, before servicing and when changing parts. Ensure that the switch is in “off” position before pulling in tool.
- Only trained repair persons should attempt repairs, electrical or mechanical.

34.1.7 General Maintenance of Power Equipment:

Equipment Operator must check engine oil every-time he/she uses a piece of power equipment. Oil must be changed every two months or as needed during summer and once during winter preventive maintenance. Air filter and gas filters must be checked; cleaned and replaced as needed. Spark plugs must be checked and cleaned once a month. Blades must be sharpened prior to season and as needed during season. Blades must be replaced if defective. Weed trimmer heads must be checked to make sure trimmer line spool is full. Gas/ oil mix must be checked often.

34.1.8 Storage of Equipment and Gas:

Equipment must be store only in designated areas. All gas cans, gas/oil mix and starter fluids must be placed inside a Certified Fire Protection Cabinet. Small engine equipment such as weed trimmers or leaf blowers must never be hung from steam and hot water pipes and natural gas lines. Spark plug wires must be removed when putting equipment away or when employee is working on a piece of equipment. During winter months make sure all equipment except snow blowers have all petroleum products drained and the equipment serviced for the following year. All employees operating any piece of equipment must be given copies of the manufacture's specification on usage and care of all power tool or small engine equipment that employee may be using.

34.1.9 Equipment Rental

Consider the Equipment Rental option for site tasks that occur occasionally and for which purchasing equipment would be not cost effective. There is a Statewide Contract for Rental Equipment, refer to S: FamEld Drive SOP appendices for the list of Vendors on this Contract or check with the Procurement Department. As with purchasing goods or service, you will need to comply with all procurement procedures with renting equipment.

34.1.10 Systems Inventory Information

A small engine equipment and power tools Inventory & Specification sheet including date of purchase, date of service and warranty information shall be maintained in the Building systems Inventory Book and updated as needed. The Inventory shall also include all scheduled checklist forms specific to the equipment at the site, as applicable. See S: FamEld Drive, SOP Master Building Systems Appendices for sample small engine equipment and power tools Inventory, specification and checklists forms.

All small equipment and power tools must be tagged with asset number and service date records. All equipment/tool manuals and warranty information must be kept on file in maintenance Update this record as new equipment is purchased and/or old equipment removed from service.

34.1.11 Service Records

Copies of all records of all small engine equipment and power tools preventive maintenance activities including all inspection checklists, services, repairs and replacement etc will be filed in the annual Service Record Binder in the Appropriate Section. Records of all preventive maintenance purchase orders for regular and as needed services shall be filed in the annual Service Record Binder as well as the purchase order system files.

All preventive maintenance activities must be included and tracked on your Annual Preventive Maintenance Plan – Schedule and Report form See S: FamEld Drive, SOP Master Building Systems Appendices for sample Annual PM Plan – Schedule and Report Form.

34.2 Skid Steer Loaders

34.2.1 Objective:

To ensure the continuous safe operation of the Development's skid steer loader.

34.2.2 Operator Licensing Requirements

All employees using Skid Steer Loaders [or a compressed air, diesel, electric, gasoline, or steam drum hoists or winches to lift and move loads] must possess a valid, current Hoisting License. It is the responsibility of the superintendent to insure that all employees operating a Skid Steer Loader [or a compressed air, diesel, electric, gasoline, or steam drum hoists or winches to lift and move loads] have a valid and current Hoisting License. See Fam/Eld S:Drive, SOP Appendices for more information

34.2.3 Training Requirements

Superintendents shall insure that all employees operating skid steer loaders are licensed and are properly trained. All Operators should understand the potential hazards as well as the safety precautions to prevent those hazards from occurring. See Public P-Drive, SOP Appendices for the handout on Skid Steer Loader Training, a training developed by the Risk Manager and Landscape Management Coordinator. All Skid Steer Loader Operators must receive a copy of this handout and a copy must be posted in the maintenance office. The Risk Management Department in conjunction with the Operations Department provides annual training in Skid Steer Loader – Safe Operation & Maintenance. The training program is usually scheduled in November. All employees operating Skid Steer Loaders must attend this annual training.

34.2.4 Scheduled Activities for Safe Operation and Maintenance of Skid Loader:

Daily / Upon Each use

Operator's Responsibilities:

Operating a Skid loader is a very serious undertaking and as with all equipment/tools – power and non-power - the operator must exercise extreme care before, during and after operation.

Prior to use, the Operator must:

- Check all fluids including water (for water cooled engines), diesel fuel, and oil
- Perform a walk-around inspection of the vehicle

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- Check for defects, including tires, lights; safety features; lift arms and cylinder pivot pins; attachments and other components
- Make sure that everything is in tact and working properly.
- Report any problem immediately.

If the operator encounters any problems during the workday with the skid loader this also must be reported to a supervisor immediately.

Prior to, during and after use of Skid Steer Loaders, Operators must:

- Familiarize him/herself with the work area before operating the skid loader, checking for obstacles and avoiding uneven terrain and steep slopes.
- Turn off the engine when fueling the skid loader.
- Never overload the bucket (refer to the Manufacturer's manual for optimal load amounts and make sure you are using the right size bucket for the machine you are operating).
- Use the equipment carefully to avoid harm to property or persons.
- Never lift, swing, or move a load over any person
- Never start to dig at a site unless Dig Safe has provided clearance.
- Clean the equipment after each use.
- Report any problem immediately. If the employee encounters any problems during the workday with a tool or equipment this also must be reported to a supervisor immediately.
- Always adhere to the safety precautions found in the Manufacturer's operation & maintenance manual.

Maintenance Superintendent Responsibilities - Ongoing:

The Maintenance Superintendent shall insure that the equipment is properly stored, maintained and operated at all times. In the event of equipment failure or breakdown, the maintenance superintendent is responsible for contacting the Service Company and issuing a purchase order for repairs and/or service as needed.

Three Times Per year

Service Programs Coordinator Responsibilities

The service program coordinator will insure that preventive maintenance services are carried out on all Skid Steer Loaders (at the sites) at least three times per year. The service program coordinator shall issue a contract or purchase order on an annual basis and shall have the equipment serviced on site in approximately October, February and July of each year.

Contractor Responsibilities

The contractor shall be responsible for completing full cleaning and servicing as called for by the BHA's purchase description and by manufacturer operating and maintenance recommendations. The service contractor shall leave with site staff a full service slip after each planned maintenance or repair visit, detailing work completed and noting any further corrective action needed. This slip must be signed by a site staff member who can verify that work was performed.

34.2.5 Systems Inventory Information

A Skid Loader Inventory & Specification sheet including date of purchase, date of service, list and model number for all attachments and warranty information shall be maintained in the Building systems Inventory Book and updated as needed. The Inventory shall also include all scheduled checklist forms specific to the Skid Loader at the site. See S: FamEld Drive, SOP Master Building Systems Appendices for Skid Loader Inventory, specification and checklists forms. The Service Program Coordinator will also maintain these records.

34.2.6 Service Records

Copies of all records of all Skid Loader preventive maintenance activities including all inspection checklists, services, repairs etc will be filed in the annual Service Record Binder in the Appropriate Section. Records of all preventive maintenance purchase orders for regular and as needed services shall be filed in the annual Service Record Binder as well as the purchase order system files. The Service Program Coordinator will also maintain these records.

All preventive maintenance activities must be included and tracked on your Annual Preventive Maintenance Plan – Schedule and Report form See S: FamEld Drive, SOP Master Building Systems Appendices for sample Annual PM Plan – Schedule and Report Form.

Chapter 35 Vehicles/Trucks

35.1 Objective:

To maintain trucks to insure long life, safety of operation, and availability at all times needed.

35.2 Scheduled Activities:

Daily/Upon each use:

Laborer/Truck Driver Responsibilities:

It is the responsibility of the truck driver to do a visual check of the truck daily and check the fluids every time the truck is fueled. The driver shall, at each re-fueling, complete a thorough inspection of each vehicle and complete the truck inspection checklist each time this is completed. All vehicles shall be kept clean and debris free at all times and be washed as often as needed. During the winter months as salt and sand builds up this task should be performed more often at the site. After every snow/ice storm, all snow/ice removal vehicles (trucks, plows, sanders, etc) must be wiped down and cleaned thoroughly. Trucks and plows should be free of salt. Augers and other parts of sanders should be clean. Refer to Snow Removal, Chapter 14.

As needed

Laborer/Truck Driver Responsibilities:

Scrape and paint racks and body parts as needed to keep rust free. Clean up rust and re-paint at site.

In snow removal operations do not use overdrive and plow in low gear. Rubber bumpers are recommended for plow blades. Plow blades should be removed from trucks within 24 hours after a storm.

Quarterly/Annual - Regular Service

Garage Staff Responsibilities

The Garage staff maintains a schedule for regular service for all vehicles. They will contact superintendents/other staff when it is time for the truck to go to the garage for service.

35.3 Usage Policy/Licensing

It is the responsibility of the supervisor to give out and explain the BHA policy on motor vehicle usage to the truck driver and the back up driver. A copy of the policy will be kept in the glove compartment.

If an employee operates heavy equipment he or she must have an appropriate license. Supervisors should have a copy of a valid driver's license for every employee who drives a BHA vehicle. It is the employee's responsibility to inform supervisors of any change in their license status, but supervisors should also check periodically that all drivers have an up to date driver's license. Copies of all drivers' licenses must be forwarded to the Risk Management Department.

BHA will pay for renewal of special licenses (such as hoisting licenses for Skid Loaders, refer to chapter 34). The renewal application must be submitted to the Manager who will complete a check requisition.

Trucks may not be used to transport other staff members to appointments, court or other locations except in emergencies.

35.4 Insurance and Accidents/Reporting

Report accidents immediately, no matter how small, to Risk Management and the Garage.

The Authority is not self-insured as to its fleet and equipment. The Authority carries full coverage on vehicles and equipment 1997 and newer. Collision coverage carries a \$500 deductible and glass carries no deductible.

Be sure there is an Insurance ID card in each vehicle; these can be replaced if needed by Risk Management.

There should be an accident information card in each vehicle to assist in obtaining information at the scene of an accident. If not, the garage has extra copies.

Report all accidents whether there is damage or not to Risk Management using the Commonwealth of Massachusetts Report of Motor Vehicle Accident Form. Risk Management will report to police and Registry.

Accidents with Authority vehicles are not reflected on personal driving records.

If another party does damage to a BHA vehicle Risk Management will assume responsibility for obtaining reimbursement. Staff involved in an accident or witnessing the damaged should obtain and report the name and address of the responsible party.

Body damage should be repaired on newer trucks.

35.5 Vehicle Towing Policy

In the event that a BHA vehicle has been towed or stolen the following procedures must be followed:

1. Notify the direct Supervisor/Manager and Garage Forman of the following items;
 - a. Vehicle ID, including plate (this should be documented at the site or can be obtained from the Garage).
 - b. Where the vehicle was parked (include cross street references)?
 - c. Was it a legal space?
 - d. What time was the vehicle last seen?
 - e. Make note of any obvious signs of vandalism, broken glass at the space etc.
2. Once the vehicle is located, have a valid Registration available with the person picking it up. Purchase Order #'s will be needed if fees are assessed.
3. Inventory the vehicle for any additional damage or missing items. Submit a detailed report to Risk Management and copy the Garage of these items.
4. The site is liable for fees incurred by towed vehicles and additional fees for storage if the vehicle isn't located by the end of business of the first (1st) day. This charge will compound daily so follow-up is critical.

35.6 Systems Inventory Information

The garage maintains all information regarding all vehicles.

35.7 Service Records

Copies of all records of all vehicle/truck preventive maintenance activities including all inspection checklists, service-slips from the BHA Garage or outside Garage for each vehicle will be filed in the annual Service Record Binder in the Vehicle Section. Records of all preventive maintenance (P) work orders shall be filed in the annual Service Record Binder as well as the work order system files. Records of all preventive maintenance purchase orders shall be filed in the annual Service Record Binder as well as the purchase order system files.

All preventive maintenance activities must be included and tracked on your Annual Preventive Maintenance Plan – Schedule and Report form See S: FamEld Drive, SOP Master Building Systems Appendices for sample Annual PM Plan – Schedule and Report Form.

A copy of the completed work order should be provided to the Manager. The Garage staff also maintains these records.

Chapter 36 Trash Chutes and Compactors

36.1 Objective:

To maintain trash chutes and compactors in as clean a manner as possible, discouraging pest infestation, and to maintain compactors in such a way as to prolong their life as much as possible. Most compactor use is in elderly buildings.

36.2 Scheduled Activities:

Daily

Custodian/Laborer/Groundskeeper Responsibilities:

Check trash rooms to insure that all trash is removed or put down the chute. Maintain chute doors and trash room floors and walls in a clean condition. Wipe down all surfaces with disinfectant. Sweep up and dispose of any trash or garbage that escapes from the chute.

For bag-type compactors: Pull trash at least daily. Secure bags tightly and place into rubbish containers where possible. Where there are no rubbish containers, place bag in an out of the way location and insure that it is well secured to avoid odors and attraction to roaches or rodents.

For container type compactors: Pull containers in accordance with the schedule for pick up. Before returning the container to the building, wash out completely by spraying disinfectant and hosing down.

As needed

Custodian/Laborer/Groundskeeper Responsibilities:

The custodian/laborer/groundskeeper shall report to the manager/maintenance superintendent any problems with the operation of the chute doors, the proper fit of the chute seals, or the operation of the compactor immediately for correction.

Weekly

Custodian/Laborer/Groundskeeper Responsibilities:

In buildings where there is chute-washing equipment in operable condition, the custodian/laborer/groundskeeper shall wash down the chute on a weekly basis.

Manager/Maintenance Superintendent's Responsibilities:

The manager shall note the condition of trash rooms and the compactor and compactor room at each weekly inspection. The chute doors are to be checked for a proper seal. Any needed repairs shall be completed by a contractor upon issuance of a purchase order by the manager or by a BHA employee after issuance of a work order.

Annually

Manager/Maintenance Superintendent's Responsibilities

Once per year, the manager shall issue a purchase order to have the trash chutes steam cleaned, and chute door seals replaced when necessary by an appropriate contractor. Once per year, the manager shall issue a purchase order to have each compactor serviced by an appropriate compactor repair/service company.

36.3 Systems Inventory Information

A trash chute and compactor Inventory & Specification sheet including location and replacement part information shall be maintained in the Building systems Inventory Book and updated as needed. A site map can be used to supplement the location information if necessary. The Inventory shall also include all scheduled checklist forms specific to the system at the site. See S: FamEld Drive, SOP Master Building Systems Appendices for sample master trash chute and compactor inventory, specification and checklists forms.

36.4 Service Records

Copies of all records of all trash chute and compactor preventive maintenance activities including all inspection checklists, services, repairs [e.g. repair/replacement to chute doors] etc will be filed in the annual Service Record Binder in the appropriate Section. Records of all preventive maintenance (P) work orders shall be filed in the annual Service Record Binder as well as the work order system files. Records of all preventive maintenance purchase orders shall be filed in the annual Service Record Binder as well as the purchase order system files.

All preventive maintenance activities must be included and tracked on your Annual Preventive Maintenance Plan – Schedule and Report form See S: FamEld Drive, SOP Master Building Systems Appendices for sample Annual PM Plan – Schedule and Report Form.

Chapter 37 Regular Custodial Preventive Maintenance

37.1 Introduction

Regular Custodial Maintenance policies and procedures are covered in detail in Part 2 of this Manual – topics include Building and Grounds Inspections, Hallway and Common Area Maintenance, Grounds and Landscape Care, Snow Removal, Trash Removal and Pest Management. In these chapters we covered maintenance activities performed by laborers, JGs, resident custodians etc on a routine basis, occurring on a daily/weekly schedule as well as activities performed by maintenance staff [or others] on a non-routine basis occurring on a cyclical schedule annually. *Cyclical schedule annually* means occurring at varying intervals throughout the year. The cycle frequency may be quarterly – that is an activity will need to be scheduled 4 times a year, semi-annual – twice a year or annual only needs to be performed once a year.

The cyclical schedule of activities for Custodial preventive maintenance may depend on the season/weather [e.g. as with Snow Removal]; sometimes the cycle will be on a *fixed* schedule annually [e.g. Mosquito Control in late June]; and sometimes the cycle may be on an as-needed basis [e.g. frequency for scheduling basement flea/pest control may depend on the actual level of infestation].

In this chapter we are going to take a look at each topic and further discuss scheduling regular custodial maintenance activities for preventive maintenance in order to maintain the high standards for custodial maintenance expected. As with other preventive maintenance activities these maintenance custodial activities must be included and tracked on your Annual Preventive Maintenance Plan – Schedule and Report form See S: FamEld Drive, SOP Master Building Systems Appendices for sample Annual PM Plan – Schedule and Report Form.

Copies of all inspections, service records, tracking reports, repair records etc for all custodial maintenance activities subject to preventive maintenance must be maintained in the Annual Service Record Binder in the appropriate sections.

37.2 Buildings [Refer to chapters 10, 11 & 12]

37.2.1 Objective:

To maintain the buildings [interior and exterior] at the highest possible level of cleanliness, to perform regular inspections to check on safety and repair requirements and to rid all developments of pests. Note: - Building systems [e.g. elevators, fire alarms, electrical, heating, plumbing, generators, ventilation, roofs etc] are covered in the previous chapters in this part of the Manual.

37.2.2 Scheduled Activities

Daily/Weekly

Laborers/JGs and Resident Custodian Responsibilities

All interior common areas [lobby/entrances, interior hallways, stairways, common rooms, laundry rooms etc] and all building exterior [doors, windows, roofs, gutters, downspouts etc] should be inspected daily for any litter, graffiti, damage or potential hazards etc. All common areas - should be thoroughly cleaned daily – cleaned meaning all litter picked up and all areas swept. All common areas – walls, floors, ceilings etc should be thoroughly cleaned - washed down weekly. All items detailed on the Building & Grounds Inspection short-

form should be inspected at least weekly accordance with the defined standards detailed in Chapter 11. Any problems observed must be reported to the Manager or Maintenance Superintendent on the day the problem is identified. Problems may include – graffiti or damage to stair treads, carpets, railings, stair pans, windows, roofs, Entry/Exit/Fire doors, mail boxes etc. All problems must be recorded on the weekly Buildings & Grounds inspections short-form.

Manager/ Maintenance Superintendent Responsibilities:

To insure that JGs, laborers, resident custodians work to a regular schedule so that it is possible to thoroughly clean all common areas at least weekly. To perform weekly inspections of all building hallways and common areas to insure that maintenance tasks are being performed as expected and as directed. To review the completed Building & Grounds Inspection short forms that JGs, laborers, resident custodians fill out and submit weekly. All deficiencies found during any inspection must be transferred to work orders for correction as either emergency or Building and Grounds priorities.

Quarterly

Manager/Maintenance Superintendent Responsibilities:

To schedule 3 or 4 times a year - the cleaning of the outside glass of windows where the windows tilt in. To conduct a formal Building & Grounds Inspection which includes inspection of the building exterior for each unique building address. To conduct a formal inspection of each interior common area where access is limited to BHA employees [utility rooms, boiler rooms]. To conduct a formal inspection of each interior common area that is regularly accessed by residents and/or general public. All deficiencies found during any inspection shall be transferred to work orders for correction as either emergency or Building and Grounds priorities.

As needed

Manager/ Maintenance Superintendent Responsibilities:

Any painting or other repairs should be scheduled as needed according to B&G priorities etc.

37.2.3 Service Records

Copies of all formal building & grounds quarterly inspections, any service records, tracking reports, repair records etc for any building maintenance activities subject to preventive maintenance shall be maintained in the Annual Service Record Binder in the appropriate sections. The weekly Building & Grounds inspections short-forms should be filed in a 3-Ring binder or file and can be sorted by JG/Laborer/Resident Custodian.

As with other preventive maintenance activities, maintenance custodial activities must be included and tracked on your Annual Preventive Maintenance Plan – Schedule and Report form See S: FamEld Drive, SOP Master Building Systems Appendices for sample Annual PM Plan – Schedule and Report Form.

37.3 Grounds and landscape Care [Refer to Chapter 13]

37.3.1 Objective

To maintain grounds and landscape to the highest standards for overall cleanliness and curb appeal of the developments, for health and safety of residents, employees and visitors and to the longevity of hardscape and greenscape surfaces. To identify necessary maintenance, repair and replacement of grounds and landscape elements to maintain these standards.

37.3.2 Scheduled Activities

Daily/Weekly

Laborers/JGs and Resident Custodian Responsibilities:

All grounds [including but not limited to walkways, steps, parking lots, stairwells, playgrounds, benches, fences, dumpsters etc] and landscaped areas should be inspected daily for graffiti, damage or potential hazards throughout the entire year. Potential hazards may include exposed nails, footings or sharp protrusions on benches, fences, play structures; play equipment not functioning as intended; large broken or low hanging tree branches; dead or diseased trees/shrubs; missing or broken handrails; large potholes; tripping hazards; obstructed stairwells/entranceways; vegetation obstructing views etc

All items detailed on the Building & Grounds Inspection short-form should be inspected at least weekly in accordance with the defined standards detailed in Chapter 11. All problems must be reported to the Manager or Maintenance Superintendent on the day the problem is identified. All problems must be recorded on the weekly Building and Grounds Inspection short-form. All trash must be picked up from all areas daily and grounds must be cleaned. Any clogged street drains; if clog is on the surface must be cleaned. All lawn areas must be mowed and trimmed weekly throughout the growing season as long as the grass is growing. All lawn areas must be watered weekly to supplement rainfall during the summer. All planting areas and paved areas should be weeded weekly or as often as is needed. If flower beds/pots are planted they must be routinely maintained throughout the growing season. All dead, damaged shrubs or small caliper trees must be routinely removed. Perform incidental pruning of trees and shrubs [that you can handle safely with the proper tools and personal protective gear] for safety and security reasons – i.e. remove dead/broken branches, raise tree crown for clearance, prune shrubs obstructing views etc]

Manager/ Maintenance Superintendent Responsibilities:

Perform weekly inspections of all grounds and landscaped areas to insure that all grounds and landscape maintenance tasks are being performed as expected and as directed. Review the completed Building & Grounds Inspection short forms that JGs, laborers, resident custodians fill out and submit weekly. All deficiencies [e.g. exposed nails, footings or sharp protrusions on benches, fences, play structures; play equipment not functioning as intended; large broken or low hanging tree branches; dead or diseased trees/shrubs; missing or broken handrails; large potholes; tripping hazards; obstructed stairwells/entranceways; vegetation obstructing views, broken hose bibs, blocked catch basins etc] found during any inspection shall be transferred to work orders for correction as either emergency or Building and Grounds priorities.

Quarterly

Manager/Maintenance Superintendent Responsibilities:

To perform formal quarterly inspections of the grounds of each building address [Refer to Chapter 11 – Building and Grounds Inspections]. Perform formal quarterly inspections of all play areas, benches, fences etc. All deficiencies found during any inspection shall be transferred to work orders for correction as either emergency or Building and Grounds priorities.

Twice yearly

Manager'/ Maintenance Superintendent's Responsibilities:

To insure that all storm drains are cleaned twice a year. [Refer to Chapter 31 Plumbing]

Annually/Seasonally [Refer to Chapter 13 and Landscape Manual for more detail on all aspects of landscape care].

Laborers/JGs/ Resident Custodian and Program Landscape Crew's Responsibilities

To perform a thorough clean up in the Spring annually. To edge, weed and mulch all planting areas in the Spring annually. To maintain and treat [fertilize/lime at a minimum] all lawn areas annually. To pickup and remove all leaves from all areas in the Fall. If flower beds/pots are planted they must be maintained. To prune all shrubs annually as needed at the proper times at a minimum for security and safety reasons.

Manager'/ Maintenance Superintendent's Responsibilities:

To insure that all landscaped tasks are scheduled and performed within the given timelines annually. Plan on contracting out some tree care services annually [for hazard reduction pruning and/or maintenance pruning] to outside professional arborists over the winter months. At a minimum, trees should be inspected regularly for obvious potential hazards and the necessary steps should be taken to take care of all potential hazards immediately either with in-house staff or outside contractors for security and safety reasons. To schedule a formal inspection of hose bib connectors annually to make sure they are in good working order prior to the start of the landscape season. To perform an annual evening safety and lighting inspection of the grounds [this is usually scheduled in October – refer to Chapter 26].

37.3.3 Plans & Service Records

As part of your Annual Preventive Maintenance Plan, Property Managers must submit a landscape maintenance plan for your Property to the Assistant Director of Property Management or Regional Property Manager no later than April 1st, annually. Refer to Chapter 13 for Landscape Planning guidelines.

All landscape maintenance services performed by in-house program landscape crews or outside landscape contractors must be tracked and recorded on serviced maintenance reports. See S: FamEld Drive, SOP Appendices for sample serviced maintenance reports.

All tree work performed by in-house staff should be scheduled and tracked using the work-order system. Records of all preventive maintenance (P) work orders shall be filed in the annual Service Record Binder as well as the work order system files. Records of all landscape care preventive maintenance purchase orders shall be filed in the annual Service Record Binder as well as the purchase order system files.

The formal Quarterly Building and Grounds inspection reports and playground/fence/bench inspection reports must be filed in the annual service record binder in the appropriate section. The weekly Building & Grounds short-forms should be filed in a 3-Ring binder or file and can be sorted by JG/Laborer/Resident Custodian.

As with other preventive maintenance activities, maintenance custodial activities must be included and tracked on your Annual Preventive Maintenance Plan – Schedule and Report form See S: FamEld Drive, SOP Master Building Systems Appendices for sample Annual PM Plan – Schedule and Report Form.

37.4 Snow Removal [Refer to Chapter 14]

37.4.1 Objective

To insure that Developments are properly prepared for the Snow Season annually. To insure that proper snow /ice removal procedures are in place and adhered to before, during and after every snow/ice storms.

37.4.2 Scheduled Activities:

Annually

Manager/Maintenance Superintendent's Responsibilities:

To insure that the Snow Plan for your Development(s) is in place no later than October 15th every year. All snow removal equipment and supplies must be on-hand also no later than Nov. 1st. Snow Removal equipment must be serviced between April and October every year [Refer to Chapter 34] and all equipment must be tested to make sure that it is in proper working order no later than Nov. 1st. Hydrants and Storm Drains must be marked. Landscaped areas must be protected as needed. Local back-up contractor listings must be updated etc

Every Snow/Ice Storm

Laborers/JGs and Resident Custodian Responsibilities:

To remove snow and ice according to the priority order outlined in your Snow Removal Plan and in accordance with proper standards and procedures outlined in Chapter 14

Manager/ Maintenance Superintendent's Responsibilities:

Property Managers/ Maintenance Supervisors must be on the grounds as much as possible during snow removal to oversee snow removal activities and problem solve. Report to your Assistant Director for Property Management or Regional Property Manager if any problem arises regarding equipment or completing snow removal work in a timely manner. Assistant Directors and Regional Property Manager will assist with problem solving and supplying additional resources if necessary.

37.4.3 Plans and Service Records

Property Managers must submit a Snow Removal Plan for your Development to your Assistant Director for Property Management or Regional Property Manager no later than October 15th, annually. Maintain this plan in the Building Systems Inventory and post in the maintenance office. Refer to Chapter 14 for Snow Removal Plan guidelines.

The Property Manager or Maintenance Supervisor must fill out the *Snow/Ice Storm Personnel/Equipment/Material Data Sheet and Snow/Ice Removal Checklists* for EVERY snow/ice storm. Form can be obtained in the Public P-Drive, SOP Appendices Folder. A copy of these documents must be kept on file at the site and a copy must be forwarded to your Program Maintenance Supervisor along with your overtime slips. PMS will review all documents for accuracy and forward a copy to the Landscape Coordinator [in a timely manner] to file in the Master File. These documents are tools to track and record all snow/ice removal activities. The data recorded on these documents will be used in the event that there is an insurance claim and/or we need to submit information to Federal Emergency Management Agency [FEMA] for major storm reimbursement costs.

As with other preventive maintenance activities, maintenance custodial activities must be included and tracked on your Annual Preventive Maintenance Plan – Schedule and Report form See S: FamEld Drive, SOP Master Building Systems Appendices for sample Annual PM Plan – Schedule and Report Form.

37.5 Trash Removal

37.5.1 Objective

To maintain trash collection areas, trash containers and trash enclosures in as clean a manner as possible, discouraging pest infestation. To identify necessary maintenance, repair and replacement of trash containers, container covers and enclosures to maintain trash containers and enclosures in good working order.

37.5.2 Scheduled Activities

Daily/Weekly

Laborers/JGs and Resident Custodian Responsibilities

Inspect and maintain all trash areas daily. Dumpster/trash areas must be picked up and cleaned as one of the first tasks of each day. At least weekly, especially in the summer, dumpsters must be hosed down and deodorized. Any graffiti or hazards should be reported immediately to Management.

Manager/Maintenance Superintendent Responsibilities:

To inspect all dumpsters and trash collection areas during the weekly inspection walk-through of Buildings and Grounds. Dumpster contractors (who work for the City) are responsible for picking up any trash, which may fall out of the dumpster when it is dumped. They are also supposed to pick up any large items (furniture, etc) which are left next to the dumpster to be picked up. Managers and superintendents are responsible for monitoring compliance with these rules. You should notify Boston's Sanitation division of any problems, including missed pick-ups. The Program Services Coordinator will assist managers and superintendents who do not receive an adequate response from the City.

Quarterly

Manager/Maintenance Superintendent Responsibilities:

Perform quarterly inspections of all trash areas. Inspect and record the condition of each container, container covers and container enclosure. All deficiencies found during any inspection shall be transferred to work orders for correction as either emergency or Building and Grounds priorities. Trash areas should be baited to control pest infestation

Annually

Manager/Maintenance Superintendent Responsibilities:

Conduct a formal Dumpster Survey annually. A sample survey document can be obtained from the Public P-Drive, SOP Building Systems Appendices Folder All dumpsters should be painted annually. You should plan on replacing any dumpsters that are over 3-4 years old.

As needed

Manager/Maintenance Superintendent Responsibilities:

Replace covers as needed with plastic/fiberglass type covers. Make the necessary repairs as needed to insure that trash containers and enclosures are in good working order and meet standards expected.

37.5.3 Systems Inventory Information

A list of all dumpsters, sizes, ages, and locations shall be maintained in the building systems inventory binder. If the development uses compactors or other trash removal or storage systems this information shall be compiled and maintained in the Building Systems Inventory binder.

37.5.4 Service Records

Copies of all records of all trash preventive maintenance activities including all inspection checklists, services, repairs and replacements shall be filed in the annual Service Record Binder in the appropriate Section. Records of all preventive maintenance (P) work orders shall be filed in the annual Service Record Binder as well as the work order system files. Records of all preventive maintenance purchase orders shall be filed in the annual Service Record Binder as well as the purchase order system files

Keep a record of all Dumpster surveys and forward a copy to the Service Program Coordinator to file in the Master File.

As with other preventive maintenance activities, maintenance custodial activities must be included and tracked on your Annual Preventive Maintenance Plan – Schedule and Report form See S: FamEld Drive, SOP Master Building Systems Appendices for sample Annual PM Plan – Schedule and Report Form.

37.6 Pest Management

37.6.1 Objective:

To control pests in apartments, common areas, basements and grounds at all times.

37.6.2 Scheduled Activities:

Daily/Weekly/Monthly

Laborers/JGs and Resident Custodians Responsibilities

Daily inspection and cleanup of debris around dumpster areas, grounds, hallways, stairwells, common areas etc. will greatly contribute to your development plan of striving to attain pest free developments.

Laborers/JGs/Resident Custodians shall report any evidence of pest activity to Manager/Superintendent. If an active rodent problem exists and a mapping of activity and placement of bait boxes is available, activity should be monitored by staff as well as the contractor and reported to Manager/Superintendent.

Quarterly/Annually

Manager/Maintenance Superintendent Responsibilities

Record any evidence of pest activity during any LUI inspection. Any pest activity observed must be added to the Focus list for apartments for contractor follow up.

All basements/crawl spaces, dumpsters/trash areas, common areas, grounds, etc. should be inspected quarterly for any pest activity. If a problem exists, add the area to the B&G focus list for contractor follow up.

Annually

Licensed Pest Applicators - Staff or Contractor:

Must bait all catch basins annually on a fixed schedule – usually in the end of June/early July for mosquito control as requested by Suffolk County Mosquito Control (SCMC). SCMC request that all catch basins treated are marked with traffic paint. The pesticide, marking paint and paint wands will be provided by them. The paint wands must be returned to SCMD after the treatments are completed.

Annually

Manager

Prepare bidding documents for IPM contract once yearly using only state contract vendors. Refer to www.commbuys.com or the SOP appendices, Chapter 16 for the list of approved vendors. See Chapter 16 in the SOP manual and Chapter 16 in the SOP Appendices for the BHA IPM specification to bid the IPM contract and the procedure for the second year option.

As needed

Manager/Maintenance Superintendent Responsibilities

To respond to any reports of pest activity in accordance with timelines and standards outlined in Chapter 16 and 18. The standard for Extermination Call Back work orders is 14 days. Adhere to the Vacancy Preparation Standards detailed in Chapter 20 which includes cleaning up of old pesticide baits, pests and pest evidence and harborage reduction through exclusion.

37.6.3 Service Records

All extermination activities performed by in-house staff must be tracked on work orders. Copies of all inspections, BHA or outside pest service records, reports, repair records, housekeeping citations etc. for all pest management related activities must be maintained in the annual service record binder in the appropriate section.

Records of all preventive maintenance (P) work orders (actual copies or work order reports) shall be filed in the annual Service Record Binder as well as the work order system files. Records of all preventive maintenance purchase orders for IPM shall be filed in the annual Service Record Binder as well as the

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purchase order system files. Pesticide service records whether they are from in-house activities or from an IPM contractor shall be filed in the annual Service Record Binder or an IPM/bed bug log book.

As with other preventive maintenance activities, maintenance custodial and pest control activities must be included and tracked on your Annual Preventive Maintenance Plan – Schedule and Report form See S: Fam/Eld Drive, SOP Master Building Systems Appendices for sample Annual PM Plan – Schedule and Report Form.

Pest Control Service Record-keeping [From Chapter 16]

License Holder's Responsibility:

In-house employees who perform pest control services on BHA property must maintain records of all pesticide usage by filling out the **BHA Pest Control Service Record form**. See, S:drive, SOP, SOP Appendices, Chapter 16 Pests and Mold, Pesticide Use Form for a copy of this form. The information recorded on these forms and proof of insurance from the Risk Management Department will be submitted to the State annually as part of the Pesticide Usage Reporting process. This is the responsibility of the licensed pesticide applicator. See S:drive, SOP, SOP Appendices, Chapter 16 - Pests and Mold for additional information on Pesticide Use Reporting to the State. In-house employees who perform pest control services on BHA property are required to keep a copy of each completed BHA Pest Control Service Record form for his/her own personal records and the reporting requirements. The report must include all pesticides used. Remember that products available to the general public must still be reported by the BHA licensed pesticide applicator such as Round Up for weed control. A copy must also be filed with the corresponding pest control work order and submitted to the Maintenance Superintendent to file. A copy of all service records for pesticide contractors' and in-house licensed employees' work at the BHA must be provided to the manager at the time of service and kept in a Service Record Binder or IPM/Bed bug log book.

Manager/Maintenance Superintendent's Responsibility:

The Property Manager or Maintenance Superintendent must insure that all pest control work orders have a Pest Control Service Record document attached. The Property Manager, Maintenance Superintendent or their designee must maintain copies of all pest control work orders and pest control service records.

Program Maintenance Supervisor's Responsibility:

The PMS should on a yearly basis, gather the pesticide usage reports for Mosquito or weed control from their pesticide applicators and forward to the Maintenance Systems Manager at the Building Services Office. He/she will copy them to the SOP Appendices for future reference and, in case, the pesticide applicator(s) misplaced any of their copies of the documentation needed for the state usage reporting process.

Outside Contractor's Responsibility:

Outside Pest Control Contractors can use the BHA Pest Control Service Form or may use an equivalent form developed by the Contractor. If the contractor chooses to use their own form, the BHA manager should review it and approve its content prior to the start of the contract.

All records of inspections/treatments shall be maintained in the Preventive Maintenance Annual Service Record Binder or IPM/Bed bug log books.

The Boston Housing Authority does not currently have a formal Deferred Maintenance Plan, as all required work, for code compliance purposes, is captured in the work order system or the Capital planning process (CIP). After the agency completes the implementation of our new work order system (before the end of the current fiscal year), BHA may begin classifying certain work as deferred maintenance, as staff will have additional tools to assist with long-range scheduling, system-generated reminders, and reporting. This would involve the creation of a new work order priority code to capture and track items we may wish to defer for some of the following reasons:

1. **Items Best Completed When Unit is Vacant**
 - Example: A unit should have its heating pipes replaced, or heat and smoke detectors hard wired, or electrical service upgraded. Any of these items for one unit would likely be too small a project to be added to CIP but should be done when the unit becomes vacant. They would be added to the Deferred Maintenance Plan and then completed when the unit becomes vacant.
2. **Seasonal Items are items that cannot be completed because of the season.**
 - Example: Tree and shrub trimming would not be done while there is snow on the ground. This would be added to the Deferred Maintenance Plan and completed when the season permits.
3. **Lack of Funding**
 - Example: During an inspection, the property manager noticed that the common hallway needs 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 item is moved to the property's Deferred Maintenance Plan. It would be completed when the operating budget is built back up and the maintenance staff are able to commit time for the minor project.
4. **Efficiency – Items can be grouped together by location, task or trade**
 - Example: A plumber is required to repair 10 leaking diverter valves that were discovered during inspections. It is more efficient to group these work orders together for the plumber. These work orders would be deferred until the plumber can be scheduled to do them all at once.
5. **Competing Priorities**
 - Example: In the event the BHA experiences a large increase in vacancies in a short period of time and all available maintenance staff are required to focus on turning over vacant units to be available for applicants, BHA may defer work that does not compromise health or safety or adversely impact the quality of life of the resident population.

The following are examples of items that would not be postponed and added to a Deferred Maintenance List:

1. **Life & Safety Items:** If the deficiency is a life or safety hazard, it must not be moved to a Deferred Maintenance Plan. Emergency repairs are top priority and must be repaired before any other maintenance.
2. **Work order backlog** – The deferred maintenance list would not to be used as a catch all for work orders that are not completed in a timely manner.

3. **Small/Minor Items:** for example, one cracked tile would not be an item worth adding to the Deferred Maintenance Plan.

When classifying any item as Deferred Maintenance, BHA would capture the following information:

- Item
- Date Added to Deferred Maintenance Plan
- Item Description
- Location or Unit Number
- Reason Deferred
- Estimated Costs
- Materials Needed
- Original Work Order Number
- Target Completion Date
- Actual Completion Date
- Other Comments

Any Deferred Maintenance items would be reviewed regularly by BHA property managers, maintenance supervisors, regional management, and the Director of Property Management.

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 03/31/2020. It also shows the approved budget for the current year (2021) if there is one, and the percent change from last year's spending to this year's approved budget. The final column shows the current approved amount for each account divided by the number of housing units and by 12 months to show the amount per unit per month (PUM). The chart does not show a draft budget for the coming fiscal year as that will typically be developed in the final month of the fiscal year.

The budget format and accounts are mandated by the Department of Housing and Community Development (DHCD). For a better understanding of the accounts and discussion of special situations see the notes following the budget tables and the "Definitions of Accounts" at the end of this section.

The LHA maintains a consolidated budget (400-1) for all state-aided 667 (Elderly), 200 (family), and 705 (scattered site family) developments owned by the LHA. It does not maintain separate budgets for each development.

LHA Comments

2021 Budget is in the review process.

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 Boston Housing Authority operating reserve at the end of fiscal year 2020 was \$12,523,668.00, which is 88.2% of the full reserve amount defined above.

Annual Plan 2022
Annual Operating Budget

Consolidated Budget (400-1) for all state-aided 667 (Elderly), 200 (family), and 705 (scattered site family) developments owned by Boston Housing Authority.						
REVENUE						
Account Number	Account Class	2020 Approved Revenue Budget	2020 Actual Amounts Received	2021 Approved Revenue Budget	% Change from 2020 Actual to 2021 Budget	2021 Dollars Budgeted per Unit per Month
3110	Shelter Rent - Tenants	\$8,707,346.00	\$9,903,809.00	\$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	\$0.00	\$120,266.00	\$0.00	0%	\$0.00
3611	Interest on Investments - Restricted	\$0.00	\$5,348.00	\$0.00	0%	\$0.00
3690	Other Revenue	\$125,000.00	\$154,471.00	\$0.00	0%	\$0.00
3691	Other Revenue - Retained	\$0.00	\$69,057.00	\$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)	\$16,544,206.00	\$17,987,475.00	\$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	\$25,376,552.00	\$28,240,426.00	\$0.00	0%	\$0.00

Annual Plan 2022
Annual Operating Budget

Consolidated Budget (400-1) for all state-aided 667 (Elderly), 200 (family), and 705 (scattered site family) developments owned by Boston Housing Authority.						
EXPENSES						
Account Number	Account Class	2020 Approved Expense Budget	2020 Actual Amounts Spent	2021 Approved Expense Budget	% Change from 2020 Actual to 2021 Budget.	2021 Dollars Budgeted per Unit per Month
4110	Administrative Salaries	\$1,928,736.0	\$1,904,189.0	\$0.00	0%	\$0.00
4120	Compensated Absences	\$0.00	\$0.00	\$0.00	0%	\$0.00
4130	Legal	\$120,500.00	\$109,156.00	\$0.00	0%	\$0.00
4140	Members Compensation	\$0.00	\$0.00	\$0.00	0%	\$0.00
4150	Travel & Related Expenses	\$12,650.00	\$14,347.00	\$0.00	0%	\$0.00
4170	Accounting Services	\$0.00	\$0.00	\$0.00	0%	\$0.00
4171	Audit Costs	\$35,500.00	\$29,386.00	\$0.00	0%	\$0.00
4180	Penalties & Interest	\$0.00	\$0.00	\$0.00	0%	\$0.00
4190	Administrative Other	\$2,502,327.0	\$2,648,340.0	\$0.00	0%	\$0.00
4191	Tenant Organization	\$403,772.00	\$370,913.00	\$0.00	0%	\$0.00
4100	TOTAL ADMINISTRATION	\$5,003,485.0	\$5,076,331.0	\$0.00	0%	\$0.00
4310	Water	\$2,894,300.0	\$3,238,787.0	\$0.00	0%	\$0.00
4320	Electricity	\$2,354,419.0	\$3,555,056.0	\$0.00	0%	\$0.00
4330	Gas	\$1,786,400.0	\$2,195,559.0	\$0.00	0%	\$0.00
4340	Fuel	\$490,000.00	\$556,350.00	\$0.00	0%	\$0.00
4360	Net Meter Utility Debit/Energy Conservation	\$0.00	\$0.00	\$0.00	0%	\$0.00
4390	Other	\$0.00	\$0.00	\$0.00	0%	\$0.00
4391	Solar Operator Costs	\$0.00	\$570,946.00	\$0.00	0%	\$0.00
4392	Net Meter Utility Credit (Negative Amount)	\$0.00	\$-554,165.00	\$0.00	0%	\$0.00
4300	TOTAL UTILITIES	\$7,525,119.0	\$9,562,533.0	\$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 Boston Housing Authority.						
EXPENSES						
Account Number	Account Class	2020 Approved Expense Budget	2020 Actual Amounts Spent	2021 Approved Expense Budget	% Change from 2020 Actual to 2021 Budget	2021 Dollars Budgeted per Unit per Month
4410	Maintenance Labor	\$4,204,098.00	\$4,155,680.00	\$0.00	0%	\$0.00
4420	Materials & Supplies	\$875,555.00	\$721,321.00	\$0.00	0%	\$0.00
4430	Contract Costs	\$1,205,017.00	\$1,280,999.00	\$0.00	0%	\$0.00
4400	TOTAL MAINTENANCE	\$6,284,670.00	\$6,158,000.00	\$0.00	0%	\$0.00
4510	Insurance	\$471,655.00	\$505,209.00	\$0.00	0%	\$0.00
4520	Payment in Lieu of Taxes	\$66,602.00	\$66,660.00	\$0.00	0%	\$0.00
4540	Employee Benefits	\$2,853,465.00	\$2,973,096.00	\$0.00	0%	\$0.00
4541	Employee Benefits - GASB 45	\$0.00	\$0.00	\$0.00	0%	\$0.00
4542	Pension Expense - GASB 68	\$0.00	\$2,907,273.00	\$0.00	0%	\$0.00
4570	Collection Loss	\$180,000.00	\$356,235.00	\$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	\$840,000.00	\$1,123,140.00	\$0.00	0%	\$0.00
4500	TOTAL GENERAL EXPENSES	\$4,411,722.00	\$7,931,613.00	\$0.00	0%	\$0.00
4610	Extraordinary Maintenance	\$100,000.00	\$35,888.00	\$0.00	0%	\$0.00
4611	Equipment Purchases - Non Capitalized	\$187,986.00	\$231,960.00	\$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	\$3,564,169.00	\$0.00	0%	\$0.00
4600	TOTAL OTHER EXPENSES	\$287,986.00	\$3,832,017.00	\$0.00	0%	\$0.00
4000	TOTAL EXPENSES	\$23,512,982.00	\$32,560,494.00	\$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 Boston Housing Authority.						
SUMMARY						
Account Number	Account Class	2020 Approved Budget	2020 Actual Amounts	2021 Approved Budget	% Change from 2020 Actual to 2021 Budget	2021 Dollars Budgeted per Unit per Month
3000	TOTAL REVENUE	\$25,376,552.00	\$28,240,426.00	\$0.00	0%	\$0.00
4000	TOTAL EXPENSES	\$23,512,982.00	\$32,560,494.00	\$0.00	0%	\$0.00
2700	NET INCOME (DEFICIT)	\$1,863,570.00	\$-4,320,068.00	\$0.00	0%	\$0.00
7520	Replacements of Equip. - Capitalized	\$38,000.00	\$0.00	\$0.00	0%	\$0.00
7540	Betterments & Additions - Capitalized	\$0.00	\$0.00	\$0.00	0%	\$0.00
7500	TOTAL NONOPERATING EXPENDITURES	\$38,000.00	\$0.00	\$0.00	0%	\$0.00
7600	EXCESS REVENUE OVER EXPENSES	\$1,825,570.00	\$-4,320,068.00	\$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 property that has not been fully depreciated.

4110: Administrative Salaries: This account should be charged with the gross salaries of LHA personnel engaged in administrative duties and in the supervision, planning, and direction of maintenance activities and operating services during the operations period. It should include the salaries of the executive director, assistant executive director, accountants, accounting clerks, clerks, secretaries, project managers, management aides, purchasing agents, engineers, draftsmen, maintenance superintendents, and all other employees assigned to administrative duties.

4120: Compensated Absences: The debit balance in this account represents the actual cost incurred during the fiscal year for vacation, paid holidays, vested sick leave and earned compensatory time. This account includes both the direct compensated absences cost and associated employer payroll expenses (employment taxes, pension cost, etc.).

4130: Legal Expense: This account should be charged with retainers and fees paid to attorneys for legal services relating to the operation of the projects.

4140: Compensation to Authority Members: A local authority may compensate its members for performance of their duties and such other services as they may render to the authority in connection with its Chapter 200 development(s). Compensation for any other program is not authorized. Because of this, LHAs must base such compensation only on the actual rent receipts for these developments plus a prorated share of other operating receipts of funds on a per unit basis. The precise amount that members may be compensated is defined by statute to a maximum of \$40 per member per day, and \$50 for the chairperson per day. The total of all compensation to all board members is not to exceed two percent (2%) of actual gross income of Chapter 200 developments in any given year, consistent with the approved budget amount. In no case shall the payment of compensation exceed \$12,500 annually for the chairperson, or \$10,000 for any member other than the chairperson. Please note the statute requires the member to perform housing authority business in order to receive compensation.

4150: Travel and Related Expense: Legitimate travel expenses incurred by board members and staff in the discharge of their duties for any **state-aided program** are reimbursable from this account, as consistent with Department policy.

4170: Contractual Accounting Services: Fees for accounting services that are provided routinely and are contracted for on an annual basis. Only accounting services performed on a contractual basis (fee accountant) should be included in this item. Full or part-time LHA accounting staff that provides routine accounting services should be included in Account 4110, Administrative Salaries.

4171: Audit Costs: This account includes the state program's prorated share of audit fees paid to an Independent Public Accountant (IPA). The procurement of an IPA is necessary to satisfy the Federal Government's audit requirements. Costs for these services should be shared with all state and federal programs of LHA. **Audit costs are to be absorbed within the ANUEL.** The new Agreed Upon procedures (AUP) audit costs for state-assisted public housing programs should also be included in this account.

4180: Penalties and Interest: Any expenses incurred from penalties, fees, and interest paid on delinquent accounts shall be included in this line item.

4190: Administrative Other: This account is provided for recording the cost of administrative items for which no specific amount is prescribed in this 4100 group of accounts. It includes, but is not limited to, the cost of such items as: reports and accounting forms; stationery and other office supplies; postage; telephone services; messenger service; rental of office space; advertising for bids; publications; membership dues; collection agency & court costs, training costs; management fees, and fiscal agent fees.

4191: Tenant Organization: LTO Funding by the LHA. Upon request the LHA shall fund all LTOs in a city or town at the annual rate of \$6.00 per state-aided public housing unit occupied or available for occupancy by residents represented by such LTO(s) or an annual total of \$500.00 prorated among all such LTO(s), whichever is more. For more information on the creation and funding of LTOs see 760 CMR 6.09.

Authorities which operate computer learning centers, which are funded by the state consolidated budget or by other sources (which are typically recorded in line #3691 as "Other Revenue Retained", should budget the cost of the centers on this line.

4310: Water: This account should be charged with the cost of water and sewer charges purchased for all purposes.

4320: Electricity: This account should be charged with the total cost of electricity purchased for all purposes. Many LHAs have entered into Net Meter Credit Power Purchase Agreements (PPA's). In these deals, an LHA executes a contract with a solar power developer who constructs and owns an off- site solar electricity-generating site. In exchange for contracting to purchase a percentage of the solar power produced, the LHA receives a credit on its utility electric bill for each KWH purchased or in some cases receives a direct cash payment from their utility company. Please ensure that the amount charged to this account is the total cost of electricity BEFORE any reductions due to the receipt of net meter credits.

4330: Gas: This account should be charged with the cost of gas (natural, artificial, or liquefied) purchased for all purposes.

4340: Fuel: This account should be charged with the cost of coal, fuel oil, steam purchased, and any other fuels (except electricity and gas) used in connection with Local Housing Authority operation of plants for the heating of space or water supplied to tenants as a part of rent.

4360: Energy Conservation: This account is to be charged with costs incurred for energy conservation measures.

4390: Other Utilities: This account should be charged with the cost of utilities which are not provided for in accounts 4310 through 4360.

4391: Solar Operator Costs: Many LHAs have entered into Net Meter Credit Power Purchase Agreements (PPA's). In these deals, an LHA executes a contract with a solar power developer who constructs and owns an off-site solar electricity-generating site. The LHA makes regular (usually monthly) payments to the developer for its contracted share of the solar electricity produced by the site. Those payments should be entered in this account.

4392: Net Meter Utility Credit (Negative Amount): As noted in account #4391 above, many LHAs have executed Net Meter Credit Power Purchase Agreements (PPA's). In exchange for contracting to purchase a percentage of the solar power produced, the LHA receives a credit on its utility electric bill for each KWH purchased from the developer, which reduces the balance on its electric bill, or, in some cases, the credits are paid in cash to the LHA by the utility company. The total gross amount of the net meter credits that appear on the LHA's utility bills should be carried in this account and entered as a negative number. In cases where credits are paid in cash to the Host LHA, the net balance after paying out the amounts due the participating housing authorities, should also be carried in this account and entered as a negative number.

4410: Maintenance Labor: This account should be charged with the gross salaries and wages, or applicable portions thereof, for LHA personnel engaged in the routine maintenance of the project.

4420: Materials & Supplies: This account should be charged with the cost of materials, supplies, and expendable equipment used in connection with the routine maintenance of the project. This includes the operation and maintenance of automotive and other movable equipment, and the cost of materials, supplies, and expendable equipment used in connection with operating services such as janitorial services, elevator services, extermination of rodents and household pests, and rubbish and garbage collection.

4430: Contract Costs: This account should be charged with contract costs (i.e. the cost of services for labor, materials, and supplies furnished by a firm or by persons other than Local Authority employees) incurred in connection with the routine maintenance of the project, including the maintenance of automotive and other movable equipment. This account should also be charged with contract costs incurred in connection with such operating services as janitorial services, fire alarm and elevator service, extermination of rodents and household pests, rubbish and garbage collection, snow removal, landscape services, oil burner maintenance, etc.

4510: Insurance: Includes the total amount of premiums charged all forms of insurance. Fire and extended coverage, crime, and general liability are handled by DHCD on a statewide basis. All other necessary insurance policies include: Workers' Compensation, boiler, vehicle liability and owner, etc.

4520: Payments in Lieu of Taxes:

This account should be charged with all payments in lieu of taxes accruing to a municipality or other local taxing body.

4540: Employee Benefits: This account should be charged with local housing authority contributions to employee benefit plans such as pension, retirement, and health and welfare plans. It should also be charged with administrative expenses paid to the State or other public agencies in connection with a retirement plan, if such payment is required by State Law, and with Trustee's fees paid in connection with a private retirement plan, if such payment is required under the retirement plan contract.

Employee benefits are based upon a given percentage of the total payroll; therefore, the total amount approved in this account will be based on the approved budgeted salaries representing the state's fair share.

4541: Employee Benefits - GASB 45: This line covers "Other Post-Employment Benefits" (OPEB). Of the total benefits offered by employers to attract and retain qualified employees, some benefits, including salaries and active-employee healthcare are taken while the employees are in active service, whereas other benefits, including post-employment healthcare and other OPEB are taken after the employees' services have ended. Nevertheless, both types of benefits constitute compensation for employee services. In accordance with required accounting practices, this amount is not projected in the budget (and is therefore blank) but the estimated future costs of this item is carried in the operating statement.

4542: Pension Expense – GASB 68: The primary objective of GASB 68 Statement is to improve accounting and financial reporting for pension costs. It also improves information provided by state and local governmental employers about financial support for pensions that is provided by other entities. As with account 4541 above, in accordance with required accounting practices, this amount is not projected in the budget (and is therefore blank) but the estimated future costs of this item is carried in the operating statement.

4570: Collection Loss: The balance in this account represents the estimated expense to cover unexpected losses for tenant rents. Note: Do not include losses from fraud/retroactive balances here. Report them in Account 4571 – Collection Loss – Fraud/Retroactive.

4571: Collection Loss – Fraud/Retroactive: The balance in this account represents the estimated expense to cover unexpected losses for tenant rents due to unreported income, i.e. fraud/retroactive balances.

4580: Interest Expense: The debit balance in this account represents the interest expense paid and accrued on loans and notes payable. This debt can be from operating borrowings or capital borrowings.

4590: Other General Expense: This account represents the cost of all items of general expenses for which no specific account is prescribed in the general group of accounts.

4610: Extraordinary Maintenance – Non-Capitalized: This account should be debited with all *costs* (labor, materials and supplies, expendable equipment (such as many tools or routine repair parts), and contract work) of repairs, replacements (but not replacements of non-expendable equipment), and rehabilitation of such a substantial nature that the work is clearly not a part of the routine maintenance and operating program. The items charged to this account should not increase the useful life or value of the asset being repaired. These items are not capitalized and are not added as an increase to fixed assets at the time of completion. Nor are these items depreciated. An example of this would be scheduled repainting of apartments.

4611: Equipment Purchases – Non-Capitalized: This account should be debited with the costs of equipment that does not meet the LHA's criteria for capitalization. Because these items are being expended when paid, they should not be categorized as a fixed asset and therefore will not be depreciated. These items include stoves, refrigerators, small tools, most computers and software, etc.

The budget is a planning tool and as our portfolio ages it is essential that LHAs evaluate their properties annually and plan for extraordinary maintenance. To that end DHCD very strongly recommends that for all 400-1 operating budgets, depending on the age of the portfolio and condition, LHAs spend between \$100 and \$500 a year per unit in Extraordinary Maintenance, Equipment Purchases, Replacement of Equipment, and Betterments & Additions to ensure that the aging public housing stock is preserved.

4715: Housing Assistance Payments: This account should be debited with all housing assistance payments paid to landlords for the MRVP program on a monthly basis.

4801: Depreciation Expense: This account should be debited with annual fixed asset depreciation expenses as determined by the LHA's capitalization policy.

7520: Replacement of Equipment – Capitalized: This account should be debited with the acquisition cost (only the net cash amount) of non-expendable equipment purchased as a replacement of equipment of substantially the same kind. These items, such as vehicles, computers, or furniture, meet the LHA's criteria for capitalization and will also be added to fixed assets and therefore depreciated over the useful life.

7540: Betterments & Additions – Capitalized: This account should be debited with the acquisition cost (only the net cash amount) of non-expendable equipment and major non-routine repairs that are classified as a betterment or addition. These items meet the LHA's criteria for capitalization and will also be added to fixed assets and therefore depreciated over the useful life of the asset. Examples are: major roof replacement, structural repairs such as siding, or major paving work.

In accordance with GAAP accounting, inventory purchases (Replacement of Equipment and Betterments & Additions) are distinguished between capitalized and non-capitalized items. Any inventory or equipment purchase greater than \$5,000 is required by DHCD to be capitalized, inventoried and depreciated. Any inventory or equipment purchase costing \$1,000 to \$4,999 should be inventoried by LHA staff for control

purposes only but is not subject to capitalization or depreciation, it is, however, required to be expensed when the items are paid for. An LHA's inventory listing should include both capitalized and non-capitalized items of \$1,000 and more, as well as all refrigerators and stoves of any value. All items that appear on the inventory listing should be tagged with a unique identification number, and all refrigerators and stoves (regardless of value) should be tagged. LHAs may adopt a capitalization policy that capitalizes inventory purchases at a lesser amount than the \$5,000 requirement (i.e. \$1,000 - \$4,999); however, no capitalization policy can have an amount higher than \$5,000. Any inventory or equipment purchases costing \$0 to \$999 are to be expensed when paid for.

Narrative Responses to the Performance Management Review (PMR) Findings

DHCD has cancelled publication of Performance Management Reviews for fiscal years ending 3/31/2020 through 12/31/2020 due to disruptions of normal operations in response to the COVID-19 virus. Therefore, there are no ratings included in this report.

Explanation of PMR Criteria Ratings

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

CRITERION	DESCRIPTION
Financial	
Adjusted Net Income	<p>The Adjusted Net Income criterion calculation starts with an LHA's Net Income and subtracts Depreciation, GASB 45 (Retirement Costs), GASB 68 (Retirement Costs), Extraordinary Maintenance (maintenance expense outside of routine/ordinary expenses), and Equipment Purchases – Non Capitalized. This Adjusted Net Income amount is then divided by the Total Expenses of the LHA. If this Adjusted Net Income amount is positive, it means underspending and if it is negative it means overspending.</p> <p>Underspending Rating:</p> <ul style="list-style-type: none"> • "No Findings" : 0 to 9.9% • "Operational Guidance": 10 to 14.9% • "Corrective Action": 15% or higher <p>Overspending Rating:</p> <ul style="list-style-type: none"> • "No Findings" : 0 to -4.9% • "Operational Guidance": -5% to -9.9% • "Corrective Action": -10% or below
Operating Reserves	<p>Current Operating Reserve as a percentage of total maximum reserve level. Appropriate reserve level is buffer against any unforeseen events or expenditures.</p> <ul style="list-style-type: none"> • "No Findings" :35%+ of maximum operating reserve • "Operational Guidance": 20% to 34.9% of maximum operating reserve • "Corrective Action": <20% of maximum operating reserve
Capital Planning	
Capital Improvement Plan (CIP) Submitted	<p>Housing authorities are required to submit a five-year capital plan every year.</p> <ul style="list-style-type: none"> • "No Findings" =Submitted on time and no modifications required or modifications made within 45 days. • "Operational Guidance" =Up to 45 days late and no modifications required or modifications made within 45 days. • "Corrective Action" =More than 45 days late or modifications required and not completed within 45 days.
Capital Spending	<p>Under the Formula Funding Program (FF), authorities receive undesignated funds to spend on projects in their Capital Improvement Plan. They are rated on the percentage of available funds they have spent over a three-year period</p> <ul style="list-style-type: none"> • "No Findings" = at least 80% • "Operational Guidance" = At least 50% • "Corrective Action" = Less than 50%

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

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

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

Policies

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

Policy	Latest Version	Notes
*Rent Collection Policy	03/12/2019	ACOP
*Personnel Policy	04/01/2010	Policy Acknowledgement Sign-off
*Capitalization Policy	05/06/1999	
*Procurement Policy	05/29/2009	
*Grievance Policy	03/09/2018	
Community Room Use	03/25/2014	
Anti-Discriminatory Harassment Policy	10/24/2013	Civil Rights Protection Plan
Credit/Debit Card Policy	08/01/2007	
Criminal Offender Records Information (CORI) Policy	03/12/2009	ACOP
Emergency Response Plan	08/10/2004	Storm policy for staff attendance
Fair Housing Marketing Plan	03/12/2019	ACOP
Investment Policy	05/06/1999	
Language Access Plan	05/05/2014	
Pet Policy	04/01/2002	
Reasonable Accommodations Policy	01/12/2016	
Sexual Harassment Policy	04/01/2019	
Smoking Policy	09/30/2012	Non-Smoking Policy is part of Public Housing Lease, section 18

Policy	Latest Version	Notes
Other – Define in the ‘Notes’ column	03/12/2019	Admissions and Continued Occupancy Policy
Other – Define in the ‘Notes’ column	05/01/2007	Tenant Participation Policy
Other – Define in the ‘Notes’ column	09/01/2004	Resident Maintenance and Citation Policy
Other – Define in the ‘Notes’ column	03/09/2018	Violence Against Women Act Policy

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

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

Waivers

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

Description	Reason	Date Waiver Approved by DHCD	Date Expired
Admissions and Continued Occupancy Policy	align federal and state admissions policy	03/12/2019	
Tenant Grievance Procedures	align federal and state tenant grievance procedures	01/15/2019	

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

- BHA Memo DHCD
- Responses to Comments
- Cover sheet for tenant satisfaction surveys
- Tenant Satisfaction Survey - 667only
- Tenant Satisfaction Survey - 200-705only

**BOSTON HOUSING AUTHORITY**

Operations

52 Chauncy Street

Boston, Massachusetts 02111

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Fax: 617-988-4133

TDD: 800-545-1833 x420

www.BostonHousing.org

MEMORANDUM

TO: DHCD () Urgent

FROM: John Kane () Please Reply by: _____

DATE: January 6, 2021

SUBJECT: BHA annual plan

The Boston Housing Authority has shared the State Annual Plan 2021 with the city-wide, peer-elected Resident Advisory Board. BHA staff met with the Resident Advisory Board from September through December discussing the Plan process and documents and sent copies of the Plan to the RAB and Local Tenant Organizations. The Plan was put out for public comment on November 1, 2020 and the comment period closed on December 15, 2020 with a virtual public hearing held on zoom December 7, 2020 at 11 am and another at 6 pm.

The BHA took several steps to notify the public of the FY 2021 State Annual Plan and the opportunity to comment. The BHA placed an advertisement in the Boston Globe, included a notice with the rent statement of public housing residents, sent a mailing to Leased Housing participants in Boston and nearby towns notifying them of the Public Hearing and the proposed Plan. The BHA also sent letters to many local officials and advocacy groups. The Plan was made available for review at Boston Public Library Copley Square branch, BHA's headquarters at 52 Chauncy St., and on its website www.bostonhousing.org.

The RAB has not submitted a letter to BHA regarding the state annual plan. However, the RAB and public have submitted comments which appear alongside written responses in another attachment called Response to Comments.

Comments and Responses to the BHA FY 2021 State Annual Plan.

The following document contains the comments and responses received on the BHA's FY 2021 State Annual Plan. BHA staff met with the Resident Advisory Board from September through December discussing the Plan process and documents and sent copies of the Plan to the RAB and Local Tenant Organizations. The Plan was put out for public comment on November 1, 2020 and the comment period closed on December 15, 2020 with a virtual public hearing held on zoom December 7, 2020 at 11 am and another at 6 pm.

The BHA took several steps to notify the public of the FY 2021 State Annual Plan and the opportunity to comment. The BHA placed an advertisement in the Boston Globe, included a notice with the rent statement of public housing residents, sent a mailing to Leased Housing participants in Boston and nearby towns notifying them of the Public Hearing and the proposed Plan. The BHA also sent letters to many local officials and advocacy groups. The Plan was made available for review at Boston Public Library Copley Square branch, BHA's headquarters at 52 Chauncy St., and on its website www.bostonhousing.org.

Many comments are specific to Plan attachments:

AP: Annual Plan template

CP: Capital Plan

Overview and Certification

Comment: (Ops) This is the first time that BHA has done such a report, which is a new requirement that was added by the State Legislature and DHCD. BHA is using its existing PHA Plan process for its federal programs and its Resident Advisory Board (RAB), which has always been open to state public housing resident participation and currently has several state public housing residents from West Broadway and from Franklin Field Elderly.

Response: Thank you for the comment.

Comment: (Ops & RED) (Section 1) Section 1.1 (p.2 of 4): As noted here, there are 7 BHA state family (Chapter 200, general occupancy) developments (Archdale, Fairmount, Faneuil, Gallivan Boulevard, Orient Heights, South Street, and West Broadway), 3 state elderly/disabled (Chapter 667) developments (two at Franklin Field, and one at Monsignor Powers), and 3 Chapter 705 developments (Bowdoin Street, Harwood St./Winston Rd., and scattered site), as well as 5 elderly units in smaller developments and 52 special occupancy units, for a total of 2,139 units. Should this also include Camden Street, or have all of those Chapter 200 units converted to non-state funding (or are partly accounted for under the MRVP totals, below)?

Response: Camden no longer receives state operating subsidy funding, but it is still part of the state public housing portfolio. (Operating support comes from a combination of federal Section 8 subsidy and state MRVP subsidy.) Camden Street is included in the MRVP totals. BHA will consult with DHCD about how best to capture Camden in the plan and will make updates accordingly.

Comment: (Lsd Hsg) On p. 3, it's noted that BH has 975 Mass. Rental Voucher Program vouchers (MRVP). This portfolio is far smaller than BHA's Section 8 portfolio (roughly 15,000 vouchers) or the MRVP portfolio of Metro Housing Boston (MHB), but it is still an important program/resource. It would be helpful to know how many of these units are tenant-based (mobile vouchers) and how many are project-based. Does BHA have any Alternative Housing Vouchers?

Response: BHA staff will work with DHCD to accurately reflect the number of vouchers in the MRVP program. BHA utilized voucher data in January 2021 shows 666 project-based vouchers and 201 mobile vouchers, of which 26 are AHVP.

Comment: (Legal) Also on p. 3, I believe Kate Bennett's designation is no longer "acting", and it's not clear why her email address is not used. The Board of Commissioners portion is left blank. BHA should state that as a result of the receivership litigation, it was required to have a new form of governance in which the Mayor would be accountable directly for its operations, but that there is a Monitoring Committee with a resident majority that reports to the Mayor.

Response: The template has been updated to remove acting and add Kate Bennett's email. BHA staff are working with DHCD staff to make any needed adaptations to account for BHA's governance.

Policies

Comment: (Legal, Grievance & RED) The list of policies on Section 6.1, pp. 1-2, is not complete nor up to date. For example, on the Grievance Policy, BHA began implementing changes to the Grievance Policy in 2020, partly to incorporate changes that had previously been approved by the RAB, HUD, and DHCD but not yet implemented, and partly to respond to COVID-19. In 2019, BHA also issued a revised Mixed Finance Grievance Procedure which is utilized at Orient Heights and West Broadway and other sites that are using Low-Income Housing Tax Credits or other forms of financing. The BHA's Tenant Participation Policy (which is also being revised as part of the PHA Plan process) is another policy that should be included, as well as its variation in the Mixed Finance Tenant Participation Memorandum of Agreement (MOA). That MOA may also affect the Community Room Use policy where Mixed Finance housing is involved. BHA revised its Smoking Policy slightly in 2017 to bring it into conformity with federal law. I believe BHA has extended its Violence Against Women Act (VAWA) policy to both its state and federal portfolios. BHA is also working currently on additional Mixed Finance protocols which will extend to its state portfolio where there is redevelopment.

Response: The template has been updated to include the Tenant Participation Policy and the Violence Against Women Act Policy.

Waivers

Comment: (Legal, Grievance & RED) In addition to the ACOP, there should be DHCD waivers in effect for the lease and grievance procedure, to the extent that the lease or the grievance procedure differs from what is in DHCD regulations, and in the Tenant Participation Policy (and related Mixed Finance protocols). BHA's goal is to have one uniform policy as much as possible that would comply with both state and federal requirements.

Response: Thank you for the comment. The section has been updated to include the Tenant Grievance Procedures waiver.

Budget

(Finance whole section)

Comment: On Section 4.1 (p. 1 of 6), it is stated that the 2021 Budget is in the review process. Is it expected that this budget will be provided to affected LTOs and the RAB for review & opportunity to comment, and if so, what would be the time frame for that?

Response: BHA staff are working with DHCD on the state operating budget and it remains in process. BHA staff are receptive to requests to present at an upcoming Resident Advisory Board meeting.

Comment: On p. 2 of Section 4.1, under Operating Reserves, DHCD defines a full Operating Reserve as being $\frac{1}{2}$ of the previous year's operating expenses, and local housing authorities (LHAs) are required to maintain 35% of this amount. (The text goes on to describe circumstances in which an LHA may have a lower reserve with DHCD approval). BHA says that its operating reserve at the end of fiscal year 2020 was a little over \$12.5 million "which is 88.2% of the full reserve amount defined above." This raises a question about whether the BHA is reserving too much and not spending its funds, or if this may be a temporary situation based on delays with construction work due to COVID-19; it would be helpful to know how this compares with the historic trends at the BHA and what normally would be expected.

Response: Thank you for your comment. See above response.

Comment: On p. 3 of Section 4.1, the general news is good in terms of revenue being almost \$3 million over initial projections. There are a few questions:

This shows that the actual revenue from tenants was \$1.2 million above the projected revenue (\$9.9 million in comparison to \$8.7 million). This is phenomenal, particularly if this includes rent collection during the pandemic. Any explanation for this?

Response: Thank you for your comment. See above response.

Comment: I am assuming that line 3111, although also saying “shelter rent” is for fraud recovery, and it shows nothing. One would expect that there would be some degree of recovery in a program as large as BHA’s, and it may depend on what’s counted as “fraud” and how this is accounted for, or what tools BHA has. Thus, on the federal side, BHA uses the Enterprise Income Verification (EIV) system to identify discrepancies between reported and actual income, and if excess subsidy payments are verified as due to tenant error, the tenant is required to enter into an affordable repayment plan (fraud need not be shown). This may be worth some discussion, particular if the zero figures here would cause DHCD concern. It could be that the BHA has merged into the line 3110 some recovery that should be in line 3111 (which may explain why the figure was higher than projected).

Response: Thank you for your comment. See above response.

Comment: On line 3400, why is the MRVP Administrative Fee zero? Given that BHA has over 900 MRVP units, there should be some Administrative Fee, shouldn’t there? (In p. 1, Section 4.2, it’s stated that the Administrative Fee is \$40 per unit per month.)

Response: Thank you for your comment. See above response.

Comment: On line 3610, why did the figure on Interest on Investments leap from zero to over \$120,000?

Response: Thank you for your comment. See above response.

Comment: On line 3690, what is the “other revenue” source (budgeted at \$125,000, but almost \$30,000 higher in terms of receivables)?

Response: Thank you for your comment. See above response.

Comment: On line 3691, what is the new receivable of almost \$70,000 (when this was initially listed at zero) for?

Response: Thank you for your comment. See above response.

Comment: On line 3801, it would help to explain why the DHCD operating subsidy increased (from \$16.5 million to almost \$18 million). Was this in conjunction with the budget the Legislature approved in the summer of 2019? COVID-19 temporary relief? Other reasons?

Response: Thank you for your comment. See above response.

Comment: On line 3802, it's not clear why this line, which would be MRVP subsidy payments to landlords, would be zero, if the BHA has over 900 MRVP units.

Response: Thank you for your comment. See above response.

Comment: Pages 4 and 5 of Section 4.1, on the other hand, are sobering, as they show overall expenses increased by \$9 million, leaving a gap of \$6 million after you factor in the increased revenues. While a number of items stayed within projections or were lower, notable increases were increases of roughly \$2 million for utilities (with the biggest hit in electricity and almost \$3 million in pension expenses. As shown on p. 6, BHA had anticipated having a net balance of \$1.8 million at the end of the fiscal year, and instead was \$4.3 million in the whole. It will be important to discuss with the RAB, with the City, with DHCD, and with legislators how to get into balance and what resources are needed.

Response: Thank you for your comment. See above response.

Capital Improvement Plan

(Capital Construction whole section)

Comment: Since this is the first year that the RAB has to review this, it's hard to know what to compare it to, and what the overall trends have been in terms of capital fund availability and spending. In the federal program, it has been helpful for the RAB to not only get 5-year and annual plan projections, and to see how the BHA has spent funds that were previously allocated. Funds may be reprogrammed due to cost shifts, need to address unanticipated needs, or a site-specific strategy shift (for example, to switch from piecemeal repair work to overall redevelopment over a number of years).

Response: In recent years there has been an escalation of required repairs and maintenance of existing systems across the state-funded portfolio. BHA has implemented an Authority Wide Survey strategy to address these concerns for its common systems, i.e., Building Envelopes, Roofs, Stairwells, Life & Safety, HVAC, Site Work, Utilities, and Accessibility. This approach will identify the systems current condition, the priority of each system, [high priority systems which require immediate repair from medium and low priority systems, which can be safely deferred.] determine the need for repair or replacement and its costs.

Each system survey will consist of the following:

1. Comprehensive System Survey
2. Condition Assessment Report
3. Asset Management Plan

All calculations and cost estimates required are to be provided with the accuracy and detail appropriate for future use in program development which would be expected to be incurred if bid documents were to be produced and opportunities arise for implementation. Additionally, any query within the resulting interactive spreadsheet will allow the buildings to be bundled into packages based on their priority, type of system, site development, and address, which will be used for the basis for preparing construction documents for bidding. This strategy will provide the BHA with more proactive structural approach for both tracking and managing repairs and maintenance of its existing systems.

Comment: In Section 2.1, p. 2, the planned spending exceeds the allocation (both for net formula funding (FF) funds and for unrestricted FF) by roughly \$650,000, and it would help to know how BHA can do that—was there some prior capital balance, not accounted for here, that permitted that?

Response: In the Aggregate Funding Available for Projects in the First Three Years of the CIP Table p 2 of 3. The Allocation amount is just the difference between the two preceding numbers \$13,250,204.85 less \$1,987,530.73. [the differential between Formula Funding (FF) funds and for unrestricted FF represents the balance of unspent FF from prior years plus the new awarded amount less the Emergency Reserve set-aside]

Comment: In Section 2.2, pp. 1-12, as with the federal program, this is the most useful information for the RAB, as it provides specifics as to which items will be funded over the coming 3 fiscal years at which sites. However, the descriptions need to be clear enough so that the RAB (and the public) can make sense of them. There could be some clarification on certain items:

On p. 1, where almost \$1 million was available for fire alarms at West Broadway, and less than \$250,000 was spent to date or is anticipated for spending in the next 3 years, will the balance be reprogrammed, or is it deferred to beyond the period in the chart?

Response: The report is only showing Formula Funding and the special awards DHCD attaches to formula funding and Capital Projects. It is not showing the funding in this project prior to Formula Funding. \$741,817.40 was expended from CFA 1059 established in 2004, 4 years before formula funding began. To date the total development costs of \$849,904 has been expended and the project is expected to be closed out within the next two months.

Comment: On p. 1, what is the Faneuil Decentralization Project, and why are there no expenditures projected out of the over \$600,000 total during the next 3 years?

Response: The Decentralization of the Existing Heating Systems and DHW Systems project SOW included: oil to gas fuel conversions fuel, installation of high efficiency boilers and domestic hot water systems, creation of boiler rooms, venting and electrical upgrades at four buildings. At the completion of the 95% Cd's the estimated construction costs of project was \$9,000,000. This factor along with a number of other considerations the project was suspended.

Comment: On p. 2, where \$22 million is the anticipated costs for Orient Heights Phase II, and only \$700,000 was sent prior to the plan and amounts later are fairly low, there needs to be some accounting for all of this. Similarly, on p. 6, there is \$60 million for Phase III but no schedule provided.

Response: The Orient Heights redevelopment involves financing from several sources other than DHCD's public housing capital funding, and it seems that the Capital Improvement Plan template is not properly reflecting the actual budgets. BHA is working with DHCD to address the issue, but it seems that the CIP template is not designed to integrate the additional sources—meaning, in other words, that we may not be able to correct the CIP tables. However, we offer the complete budget information here.

\$17,250,000	State Capital Funds (expended prior to Plan)
<u>\$34,841,113</u>	<u>Other funds (see below)</u>
\$52,091,113	Total

The “Other” Funds break down as follows:

\$ 2,500,000	State MassWorks grant funds
\$ 10,000,000	City of Boston Funds
\$ 1,830,000	City of Boston Neighborhood Housing Trust funds
\$ 19,896,902	Tax Credit Equity
<u>\$ 614,211</u>	<u>Other Private Funds</u>
\$ 34,841,113	Total Other

The development budget for Orient Heights Phase III is currently projected at \$80,576,726 broken down as follows:

\$ 20,000,000	State Capital Funds (expended prior to Plan)
<u>\$ 60,076,726</u>	<u>Other funds (see below)</u>
\$ 80,576,726	Total

The “Other” Funds break down as follows:

\$ 500,000	CPA funds (via City of Boston)
\$ 19,000,000	City of Boston Funds
\$ 37,608,499	Tax Credit Equity
<u>\$ 3,468,227</u>	<u>Other Private Funds</u>
\$ 60,576,726	Total Other

Comment: On p. 8, for Archdale, it would help to know what the “life/safety” items are.

Response: The Life Safety Systems will primarily be focused on Means of Egress, and Fire detection and Alarm Systems with some of the components listed below:

Means of egress components Exit access, capacity, width, number and arrangement of exists

a. Areas of refuge

- b. Travel distance to exits
- c. Exterior platforms, decks, stairs, ramps (for handicapped access) and railings
- d. Exit discharge to outside from exits,
- e. Interior and exterior illumination,
- f. Emergency lighting,
- g. Exit signs
- h. Panic hardware at exit doors
- i. Self-closing door size and vision panels,
- j. Signage, lighting, complying egress paths to public way

Fire Alarm and Detection Systems including:

- a. Integrity of in building fire emergency voice/alarm communications systems and deactivation.
- b. Fire and smoke detection devices including heat, smoke, radiant energy– sensing devices, fire, gas, carbon monoxide detectors including spacing
- c. Sprinkler systems, water flow alarm and manually actuated alarm initiating devices,
- d. Fire extinguishers
- e. Audible, visual, textual, and tactile appliances & standard emergency service interface.
- f. Circuits and pathways, class designations integrity and performance of circuits and pathways.

Emergency control function interfaces including:

- a. Electrical exit marking
- b. Audible notification systems including area of refuge (area of rescue assistance), stairway Communications systems,

Alarm processing equipment including:

- a. Alarm boxes
- b. Emergency communications systems
- c. Automatic sprinklers including heads, quick response, flow alarm extinguishing equipment
- d. Portable fire extinguishers,
- e. Duct detectors,
- f. Standpipe systems
- g. Remote shut off

Comment: On p. 9, what is the \$2.6 million for the central stores relocation project, and why are there no expenditures listed?

Response: The proposed budget of \$2.6M will be using (non-DHCD) funds and will be secured with a loan, DHCD will be reviewing the construction documents and provide technical assistance.

Comment: On pp.11-12, many of these are listed as “other funds” for which there is no detail. It would help to detail those sources of funds. It’s also not clear how the Operating Reserves figure at Orient Heights Phase III (\$44 million, with then a separate \$16 million in “other funds”) is supposed to be utilized.

Response: As mentioned in response to another comment above, the figures presented for Orient Heights were incorrect. BHA is working with DHCD to update the CIP template if possible. In the meantime, we offer the same response to this comment as we did above.

Comment: Section 2.3 (pp. 1-4) is a narrative accompanying the Capital Improvement Plan. BHA makes clear that its spending level requires an alternate plan due to how individual Cap Share would work. Is there a reason that BHA has not requested additional funding (under section 2)?

Response: Boston Housing Authority has designated \$98,533 for ADA projects.

Comment: BHA indicates in section 3 that the goal is to maintain as many units on line through security and personal safety projects, comprehensive modernization at the Chapter 667 Monsignor Powers site in South Boston, as well as surveys to identify authority-wide needs to roofing, building envelope, and stair hall work. Section 4 notes that prioritizing the Monsignor Powers' work will result in delays to work at some other sites.

Response: Thank you for the comment.

Comment: On section 7, does BHA have a projected date by which it will complete Capital Planning System (CPS) updates?

Response: Although, the CPS updates has not been completed with all the current project information, we will continue to archive our projects as completed.

Comment: On accessibility, does BHA have a projected timetable by which point 5% of its state portfolio will be ADA compliant?

Response: The Authority Wide (AW) Accessibility Survey will be conducted to review the and evaluate the paths of travel throughout the exterior and interior portions of a property, as well as accessible design of parking spaces, ramps, stairs, signage, public spaces, restrooms, community rooms, residential dwellings units, and other special uses. Once this survey is complete the BHA will be able to indicate when they will be ADA compliant.

Comment: For the special needs developments discussed in section 11 (for Chapter 167 or 689 sites), what was required for the lease agreement and the service provider input process?

Response: In accordance with 4d in the Lease/Management contract the BHA and Provider are to have an Annual Meeting - Prior to contract renewal date. The annual meeting described in 4(d) above will also include a reexamination of Capital needs as per the CPS and allow participation by all parties in updating and or modifying the CPS and identifying possible funding sources for the improvements. At the meeting the parties will adopt the Capital Planning System (CPS) and Capital Plans issued through DHCD as the basis for ongoing capital planning for the Premises. The Authority, Provider and Department of Developmental Services (DDS) will review and address any Premises related issues raised by any of the Parties. The Authority is responsible for maintaining the Premises as on element of overall public housing portfolio, so the resources it receives through

any CPS formula allocation must be distributed in an equitable manner respectful to the needs of the entire portfolio.

Comment: Section 12, on energy and water consumption, is not written in a manner which is comprehensible to residents or laypersons—could more be explained here about what the thresholds are and what BHA's performance is?

Response: 1. The threshold PUM expense levels are set by DHCD and offer a benchmark for measuring a development's performance.

2. The BHA uses MassEnergyInsight to collate and track energy and water consumption.

3. Our most recent monthly energy reports are for the period 9/2019 through 8/2020.

4. The spreadsheet below in Table 1 lists the developments and their performance relative to the threshold PUM, by utility category provides a tabulated review of BHA's Utility usage.

5. The Boston Housing Authority is implementing numerous energy and water conservation projects and is reviewing additional tools to analyze the portfolio's performance.

6. At Monsignor Powers, large-scale envelope projects (windows, doors, insulation, cladding, roof, etc.) and mechanical system upgrades, funded in part by LEAN and a DHCD Comprehensive Sustainability Initiative (CSI) grant, will significantly reduce consumption and improve comfort at the site. See Table 1 appended at the end of responses for further information.

7. The Climate Hazard Adaptation and Resilience Masterplan (CHARM) is a strategic plan that incorporates readily-deployable climate resilience tools that enable DHCD to direct capital funds and provide capacity building to local housing authorities to mitigate climate change vulnerabilities for the residents living in DHCD-supported, locally-managed housing." The BHA continually looks for ways to implement new strategies by laying out programs, policies, and actions based on CHARM, and to facilitate a better understanding of their building's climate resilience and how they may be effective by participation, storm surge and temperature.

Comment: On vacancies (section 14), BHA's rate is far greater than it should be for its Chapter 200 program (7% as opposed to 2%), and is somewhat higher for the Chapter 705 program (3% as opposed to 2%). The explanation given here needs to be fleshed out more, as well as a concrete strategy to bring vacancies within acceptable levels. This affects BHA's delivery of affordable housing to the many families in need of help.

Response: The BHA is undergoing a large-scale reorganization of the Admissions department and the way that waiting lists are processed which will increase occupancy rates. As of the most recent report we are over 97% in the state public housing portfolio.

Maintenance and Repair

(Operations whole section)

Comment: On Section 3.1 (p. 3 of 7): For the emergency request system, is there any ability to email or text requests for repair, so that there is a record and “phone tag” issues can be avoided? There is a similar question for normal maintenance (p. 4)—it appears that the only system is by phone, and this should likely be supplemented by other means, particularly during the pandemic.

On p.5, while DHCD asks for feedback from tenants on Maintenance Operations, there is nothing to show that BHA incorporated any tenant feedback into establishing the Standard Operating Procedure (SOP) or sought tenant comments regarding whether it has been effectively implemented. The SOP should also be made available to residents for review.

On p.6, the use of hand-held tablets should improve the quality of inspections; interesting, however, that there is NO discussion about COVID-19’s impact on inspections and repairs for this cycle.

In subsection D later on p. 6, good that BHA was able in the last fiscal year to do maintenance within budget (and that extraordinary maintenance costs were only about 35% of what was budgeted). Extra steps required by COVID-19 presumably will make such expenses higher this year.

On p. 7, subsection E, these turnover periods (59 days to do maintenance, and 94 days until new lease up) are unacceptably long, and it would help to know what DHCD’s expectations and how this compares with past BHA performance. Here again, this affects BHA’s ability to carry out one of its key missions, to provide affordable housing to families in desperate need.

Response: The BHA’s work order center is staffed 24 hours, 7 days per week, and any missed calls are rolled to a supervisor’s cell phone, so any phone tag issues should be rare. As part of the implementation of the new work order system, the agency is planning to provide a web-based portal to allow for text-based reporting of maintenance concerns.

The SOP was created as a procedural manual for staff, but BHA acknowledges that the document should be available for resident/public access. It will be posted on the BHA web site.

BHA’s inspection schedule and maintenance delivery has been, and continues to be, impacted by COVID-19. From the beginning of the pandemic, like other public and private organizations, BHA complied with the state shutdown and City requirements, and suspended inspections and significantly limited maintenance to emergency response, and some common area work that could be done without entering units. BHA has gradually expanded the maintenance work (with full PPE), and is now conducting health and safety inspections in units in lieu of full, annual UPCS unit inspections, per DHCD’s direction.

Many of the units in the state program are occupied by long term residents, and as such, the units often require significant reconditioning upon turnover (new cabinets, flooring, etc.). In addition, the amount of redevelopment and the necessary relocation of households that goes along with that can significantly impact the time it takes to prepare and lease units. The needs of households that are being displaced, and the timetables that drive those moves factors heavily into prioritizing the work of turning over the units that fit the needs of those who need to be moved. Both BHA and DHCD use 30 days as the standard for maintenance turnovers. BHA has been much closer to this number

in years with less relocation/unit transfer volume. For context, the BHA's performance for maintenance turnover in the prior FY was 34 days.

Comment: On the Preventive Maintenance Schedule, there is reference to separate guidance on Living Unit Inspection (LUI) and Building & Grounds Inspections in which certain items are to be tracked, but I don't believe those have been provided here.

Response: The inspection schedules are set by each property by March, before the beginning of the FY on April 1. BHA requires each property's annual inspections to be completed on a 10 month cycle, leaving 2 months at the end of the FY for catch-up and clean-up in the event a site falls behind schedule due to staffing, weather, etc. Building and Unit inspections are done quarterly.

Comment: Following this section, there is an untitled (and undesignated) section which discusses deferred maintenance. This notes that this is not a current category for the BHA, but leaves open that it may be used after the BHA completes implementation of its new work order system before the end of the current fiscal year. Some items might be deferred if better done on vacancy, or where best done in particular seasons, or where there is lack of funding, or where there would be efficiencies in combining items by location, task or trade. It should be noted that sometimes having work order tracking may better help justify special grant allocations, such as by showing the need for comprehensive modernization because certain problems simply can't be adequately addressed by routine work orders. However, no resident should have to leave for a prolonged period in a non-habitable unit—this is unacceptable, and the BHA needs to be sure that basic quality of life issues are timely addressed for its residents either through repair or through transfer and avoiding reoccupancy of a unit until it can be restored to habitability.

Response: BHA is committed to providing safe, decent housing for residents. BHA will not consider any policy that would defer work that needs to be done to correct maintenance conditions that would make a unit unsafe for habitation, and would transfer the household if the work cannot be completed while the unit is occupied.

Attachments

(Operations)

Comment: Because of COVID-19, certain items that would normally be in the Performance Management Review (PMR) are being omitted, such as tenant satisfaction surveys. However, as has been evidenced by the continuation of relocation planning and counseling at a number of BHA sites, it should still be possible to get solid information from residents during the pandemic of their views about what is working and what needs improvement.

DHCD and BHA have shared limited survey data that was collected in 2016. While this is of limited utility 4 years later, and the numbers who participated in the survey were relatively small, it's still of some value to look at the data. The Chapter 667 survey response information here shows that BHA is similar to other large LHAs in the Greater Boston area (and actually had a greater number of residents who thought they were dealt with courtesy and respect by LHA staff, had seen the capital improvement plan, or knew about programming).. On the other hand, a higher percentage had

encountered heating problems (41%, as opposed to 29% elsewhere). BHA's response time was better than other large LHAs (45% reported response to heating problems in less than 24 hours, while only 23% at other large LHAs). Perceptions of safety were also slightly better at BHA sites. On the other hand, the tenant surveys for the Chapter 200/705 programs (family public housing) tell a slightly different story. Here other large LHAs did a little better in the perception of courtesy and respect (80% as opposed to BHA's 75%), while BHA did better in terms of the number of residents who had seen budgets, plans, or knew of the BHA director's meeting with residents. BHA's response time for heating emergencies, moreover, was not as favorable for this portfolio, with 36% reporting response within 24 hours (in comparison to 49% reporting this at other large Greater Boston LHAs). Safety perceptions in these sites were also not as favorable as for other large LHAs. This shows the need for improvement in BHA's response and actions for the Chapter 200 and Chapter 705 portfolios.

Response: BHA is committed to improved performance and better communication with residents to be certain their concerns, needs, and priorities inform decision-making. The agency is developing tools to make outreach and feedback easier and more frequent, including the procurement of software that will make it easier to communicate with residents by email and text message notifications to conduct surveys, and better, and more efficiently, inform residents about maintenance issues like planned water or power shutdowns, or the status of repairs that impact multiple units, addresses, or buildings.

Table 1						
Development	Annual Cost	# Units	PUM	Threshold	Exceeds Threshold	
					Yes	No
501 WEST BROADWAY						
Electric (kWh)	\$613,278	486	\$105	\$100	x	
Gas (Therms)	\$180,823	486	\$31	\$80		x
Water (HCF)	\$1,018,356	486	\$175	\$60	x	
504 FANEUIL						
Electric (kWh)	\$282,558	258	\$91	\$100		x
Gas (Therms)	\$13,477	258	\$4	\$80		x
Oil (Gallons)	\$433,404	258	\$140	\$50	x	
Water (HCF)	\$505,994	258	\$163	\$60	x	
505 FAIRMOUNT						
Electric (kWh)	\$385,662	202	\$159	\$100	x	
Gas (Therms)	\$185,131	202	\$76	\$80		x
Water (HCF)	\$369,769	202	\$153	\$60	x	
507 ARCHDALE						
Electric (kWh)	\$373,559	283	\$110	\$100	x	
Gas (Therms)	\$270,263	283	\$80	\$80		x
Water (HCF)	\$540,136	283	\$159	\$60	x	
508 ORIENT HEIGHTS						
Electric (kWh)	\$189,745	239	\$66	\$100		x
Gas (Therms)	\$293,364	239	\$102	\$80	x	
Water (HCF)	\$295,718	239	\$103	\$60	x	
510 GALLIVAN						
Electric (kWh)	\$394,962	249	\$132	\$100	x	
Gas (Therms)	\$423,942	249	\$142	\$80	x	
Water (HCF)	\$436,793	249	\$146	\$60	x	
512 SOUTH STREET						
Electric (kWh)	\$91,104	132	\$58	\$100		x
Gas (Therms)	\$160,233	132	\$101	\$80	x	
Water (HCF)	\$190,469	132	\$120	\$60	x	
601 FRANKLIN FIELD FAMILY						
Electric (kWh)	\$83,554	40	\$174	\$100	x	
Gas (Therms)	\$113,530	40	\$237	\$80	x	
Water (HCF)	\$83,683	40	\$174	\$60	x	
602 FRANKLIN FIELD SENIOR						
Electric (kWh)	\$1,215	32	\$3	\$100		x
Gas (Therms)	\$30,276	32	\$79	\$80		x
Water (HCF)	\$112,615	32	\$293	\$60	x	
603 MONSIGNOR POWERS						
Electric (kWh)	\$129,722	68	\$159	\$100	x	
Gas (Therms)	\$9,978	68	\$12	\$80		x
Water (HCF)	\$55,001	68	\$67	\$60	x	
653 CLIFTON/BALCHELDER-SPEC. NEEDS						
Electric (kWh)	\$13,064	6	\$181	\$100	x	
Water (HCF)	\$22,608	6	\$314	\$80	x	
756 705-6 CONDOMINIUMS						
Electric (kWh)	\$383,623	141	\$227	\$100	x	
Gas (Therms)	\$94,692	141	\$56	\$80		x
Water (HCF)	\$206,575	141	\$122	\$60	x	

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.

BOSTON HOUSING AUTHORITY

Chapter 667 Housing Summary Fall 2016

The Center for Survey Research at the University of Massachusetts Boston sent surveys to 9624 housing units (Chapter 667) in Massachusetts in the fall of 2016. 5511 residents responded.

Surveys were sent to **174** housing units (Chapter 667) in the **Boston Housing Authority**. **69** surveys were completed.

This report provides some information about how the residents from the **Boston Housing Authority** who answered the survey responded. It compares answers to those from the entire state and to those from large LHAs in Greater Boston. These large LHAs in the Greater Boston area include: Boston, Chelsea, and Quincy.

Communication

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

	Boston Housing Authority	Large LHAs in Greater Boston*	Entire State
Contacted management about a problem or concern.....	75%	77%	76%
Felt they were usually or always treated with courtesy and respect when they contacted management.....	81%	71%	88%
Saw the Capital Improvement Plan.....	33%	24%	31%
Saw the Operating Budget.....	13%	14%	17%
Knew the Executive Director held a meeting with residents...	49%	45%	53%

* Large LHAs in the Greater Boston area include: Boston, Chelsea, and Quincy.

Services and Programs

65% of the Boston 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:

	Boston Housing Authority	Large LHAs in Greater Boston	Entire State
Job training programs.....	12%	8%	6%
Money management programs (budgeting, taxes, income building).....	12%	9%	9%
Children's programs (tutoring, childcare, afterschool programs).....	15%	5%	2%
Health and Medical Services (visiting nurse, meal programs).....	42%	45%	35%
Adult Education (GED, ESL, educational counseling)	19%	17%	11%

Maintenance and Repair

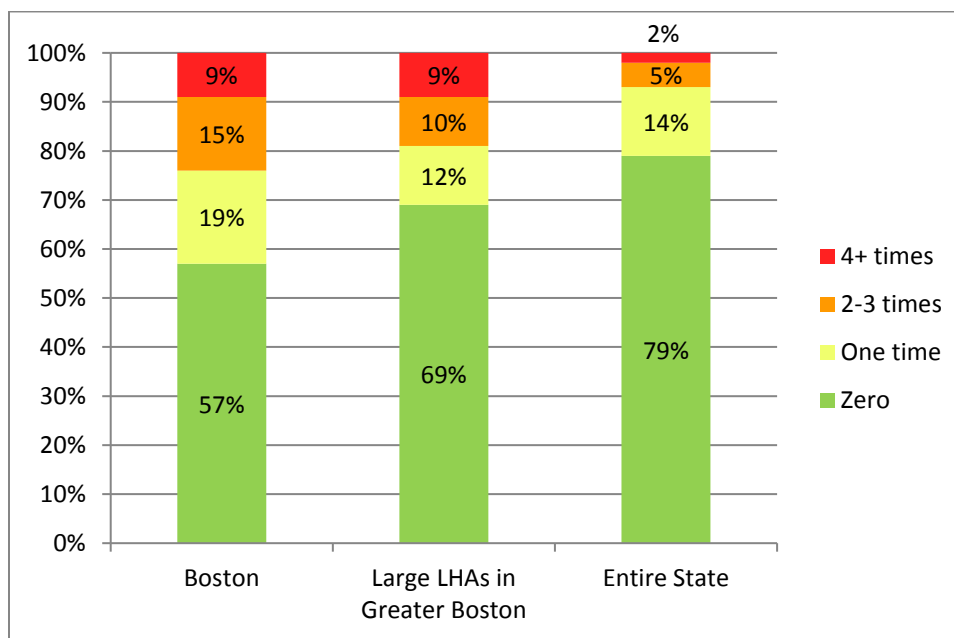
- **Who had problems?** Less than half of respondents had a problem with their heating and about half had a plumbing problem in the last 12 months.

	Boston Housing Authority	Large LHAs in Greater Boston	Entire State
Had a heating problem.....	41%	29%	20%
Had a problem with water or plumbing.....	49%	56%	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.

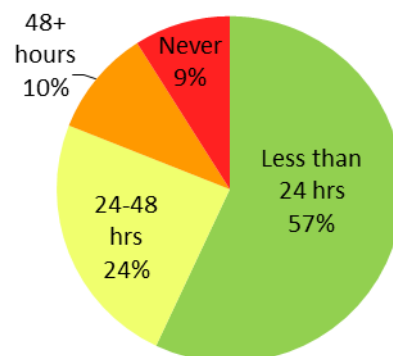
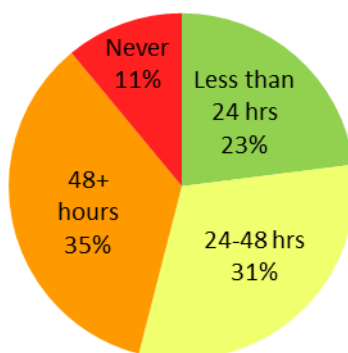
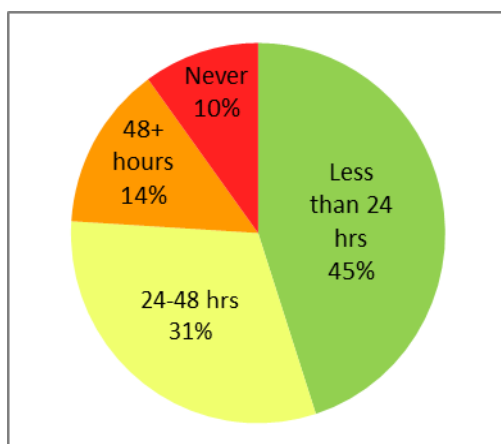


How long did it take to fix the heating problems? For those respondents who had problems, we asked how long it usually took for the problems to be fixed – less than 24 hours, 24 - 48 hours, more than 48 hours, or never fixed.

Boston Housing Authority

Large LHAs in Boston

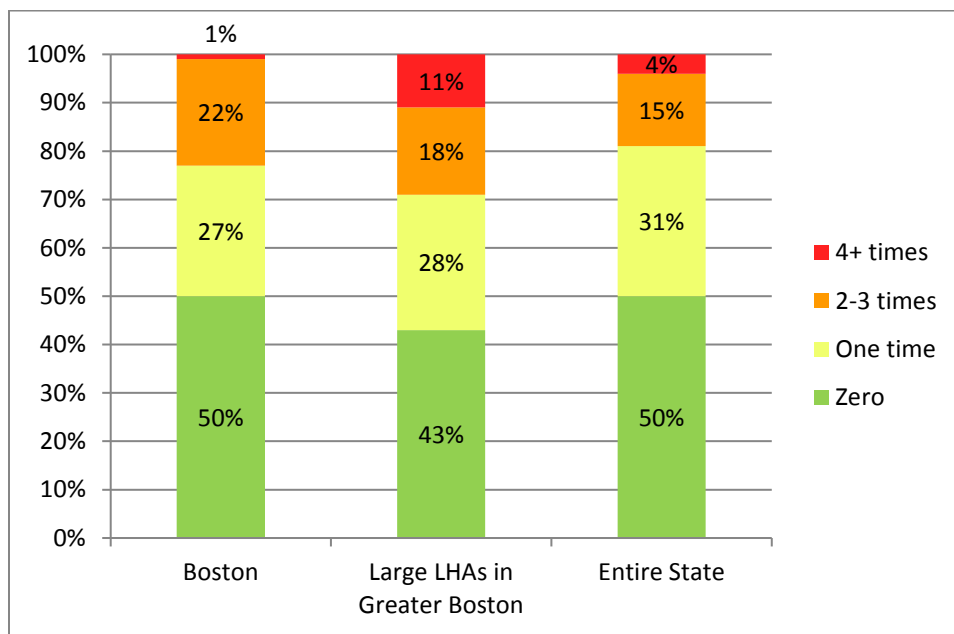
Entire State



- **Water or Plumbing Problems**

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

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

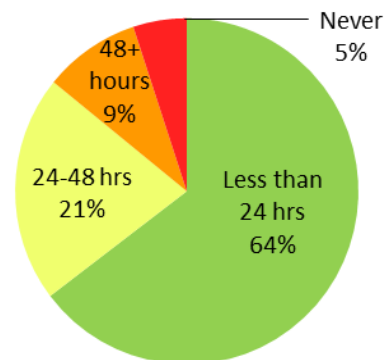
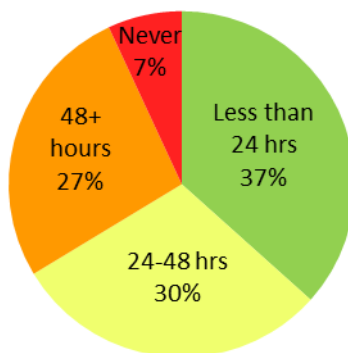
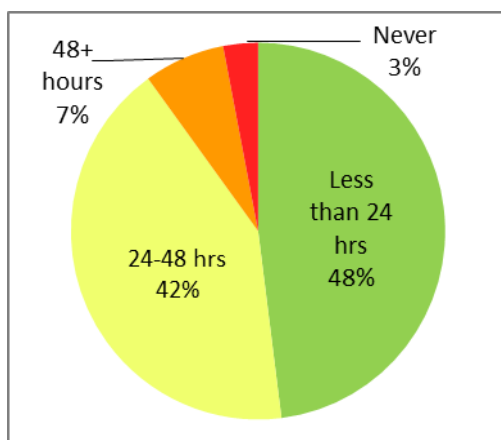


How long did it take to fix the water or plumbing problems? For those respondents who had problems, we asked how long it usually took for the problems to be fixed – less than 24 hours, 24 - 48 hours, more than 48 hours, or never fixed.

Boston Housing Authority

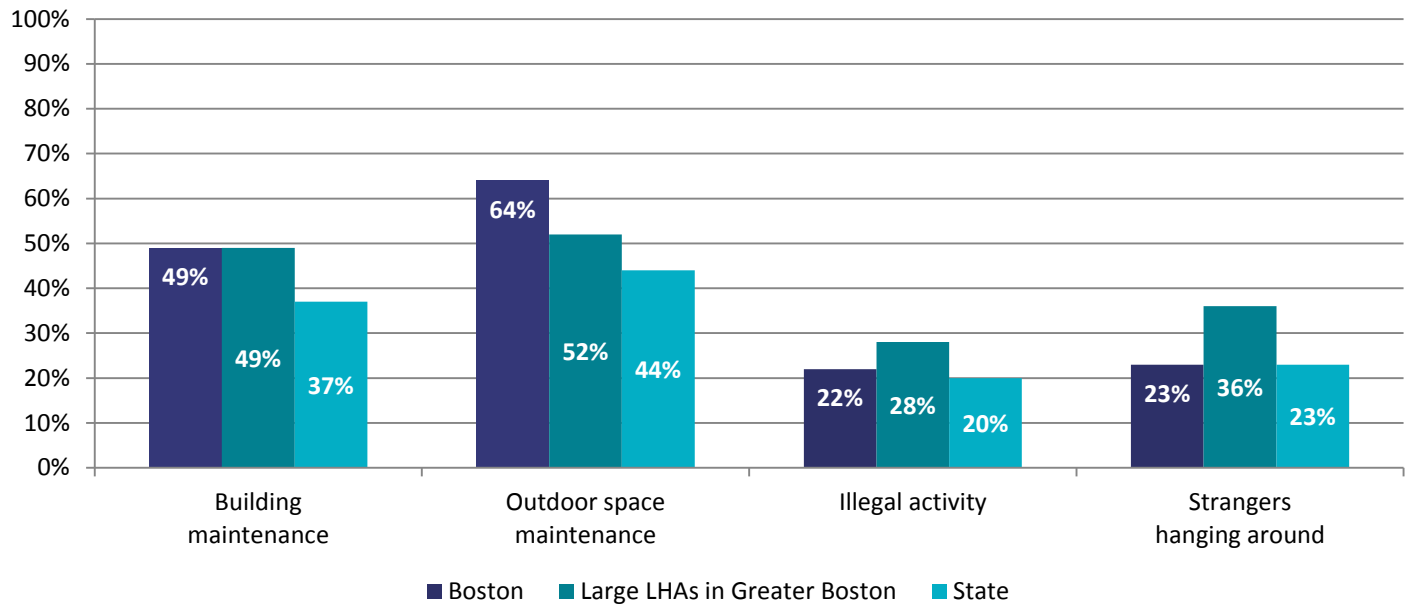
Large LHAs in Boston

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.

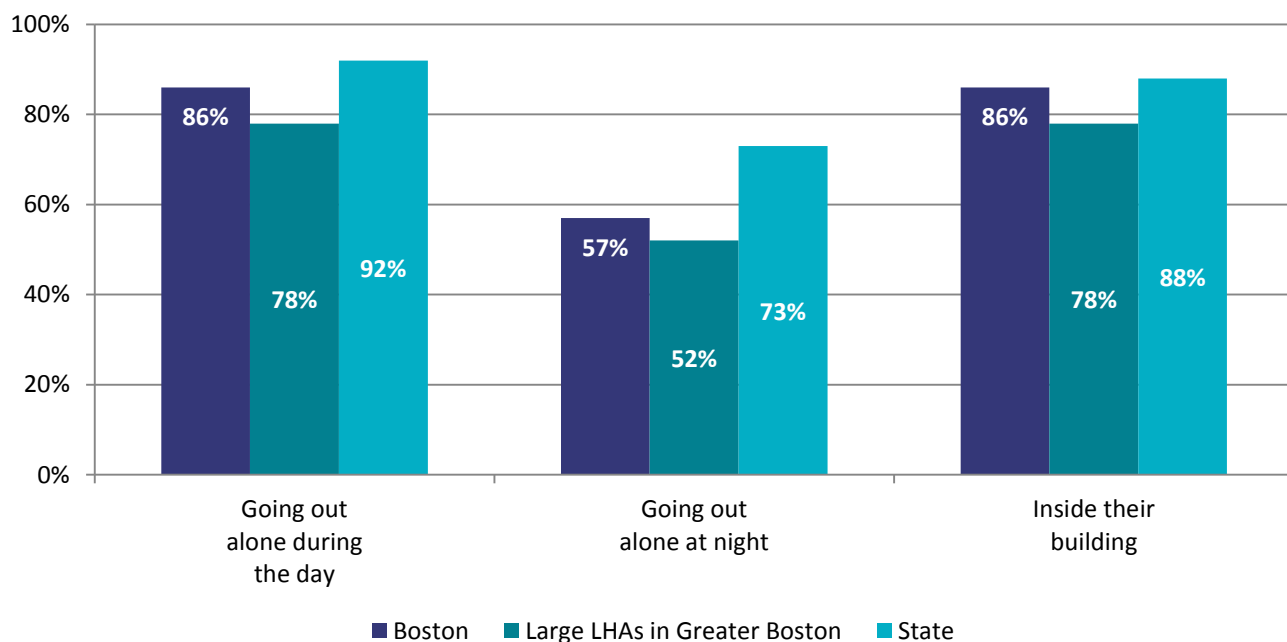
Respondents who “always” or “sometimes” had problems with....



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”



BOSTON 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 **347** housing units (Chapters 200 and 705) in the **Boston Housing Authority**. **94** surveys were completed.

This report provides some information about how the residents from the **Boston Housing Authority** who answered the survey responded. It compares answers to those from the entire state and to those from all large LHAs in Greater Boston. Large LHAs in the Greater Boston area include: Arlington, Boston, Chelsea, Everett, Quincy, Revere, Somerville, Waltham, and Watertown.

Communication

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

	Boston Housing Authority	All Large LHAs in Greater Boston*	Entire State
Contacted management about a problem or concern.....	89%	86%	87%
Felt they were usually or always treated with courtesy and respect when they contacted management.....	75%	80%	76%
Saw the Capital Improvement Plan.....	32%	18%	18%
Saw the Operating Budget.....	28%	15%	12%
Knew the Executive Director held a meeting with residents..	27%	20%	21%

* Large LHAs in the Greater Boston area include: Arlington, Boston, Chelsea, Everett, Quincy, Revere, Somerville, Waltham, and Watertown

Services and Programs

80% of the Boston 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:

	Boston Housing Authority	All Large LHAs in Greater Boston*	Entire State
Job training programs.....	31%	34%	31%
Money management programs (budgeting, taxes, income building).....	19%	23%	29%
Children's programs (tutoring, childcare, afterschool programs).....	39%	38%	39%
Health and Medical Services (visiting nurse, meal programs).....	33%	29%	26%
Adult Education (GED, ESL, educational counseling)	33%	33%	29%

Maintenance and Repair

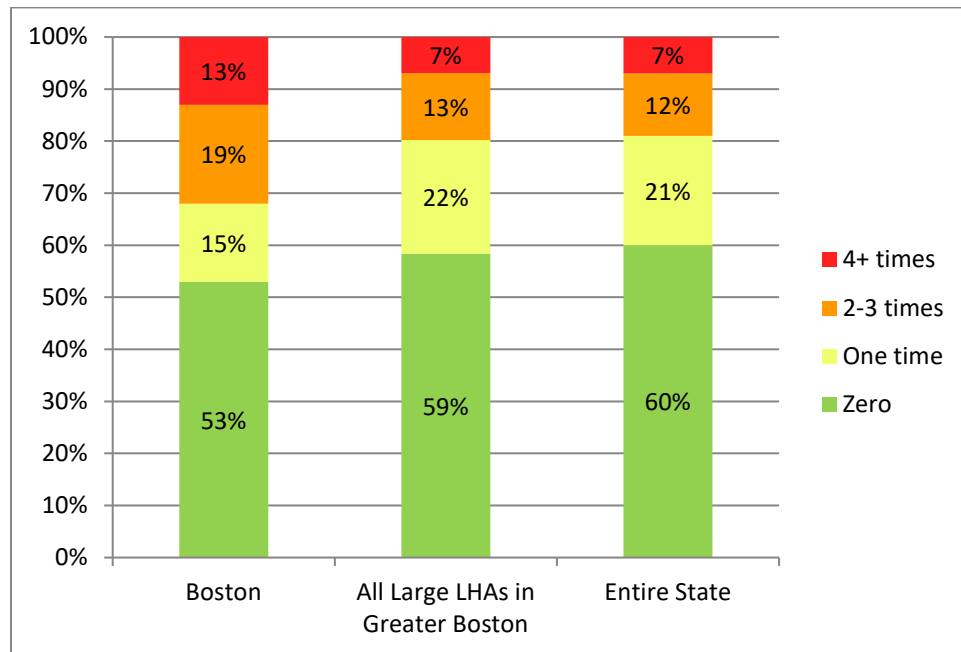
- **Who had problems?** About half of respondents had at least one maintenance problem in the last 12 months.

	Boston Housing Authority	All Large LHAs in Greater Boston*	Entire State
Had a heating problem.....	46%	40%	39%
Had a problem with water or plumbing.....	50%	61%	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.

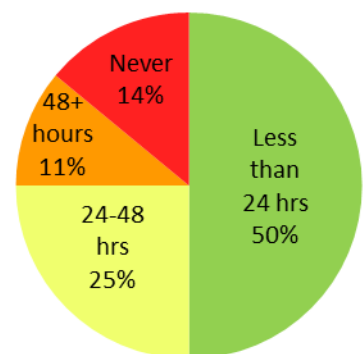
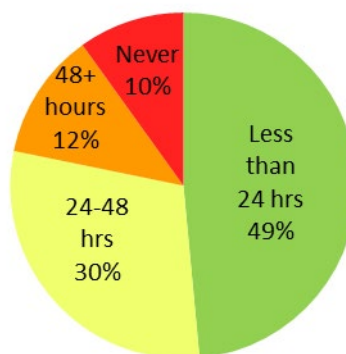
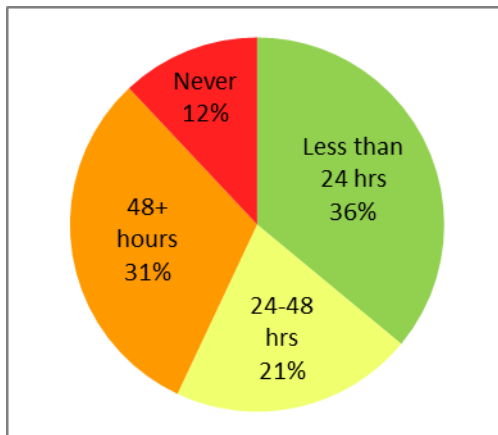


How long did it take to fix the heating problems? For those respondents who had problems, we asked how long it usually took for the problems to be fixed – less than 24 hours, 24 - 48 hours, more than 48 hours, or never fixed.

Boston Housing Authority

All Large LHAs in Greater Boston

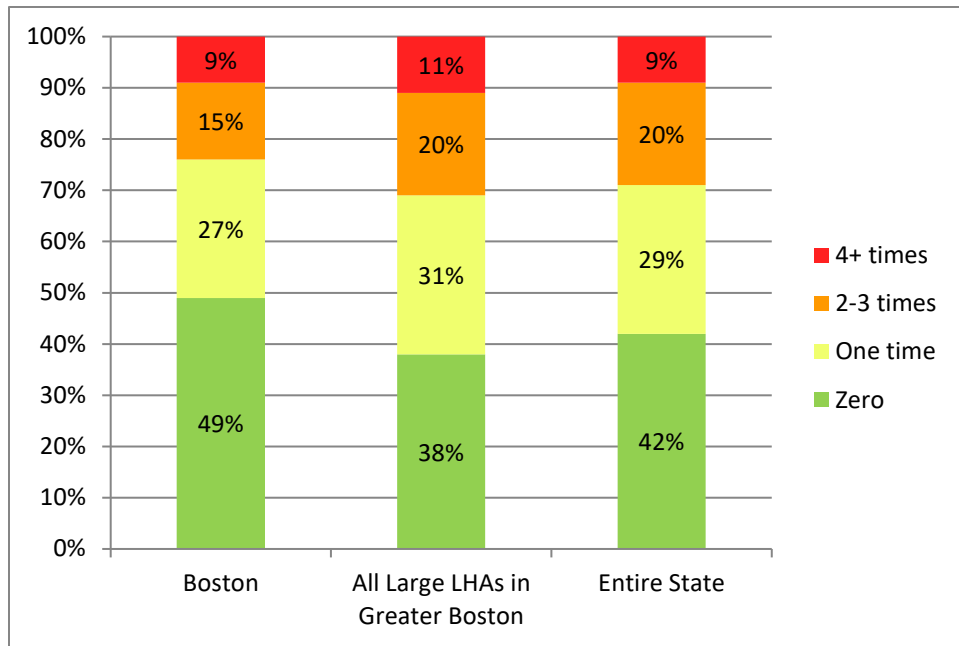
Entire State



- **Water or Plumbing Problems**

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

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

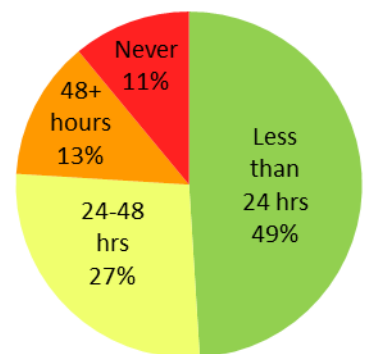
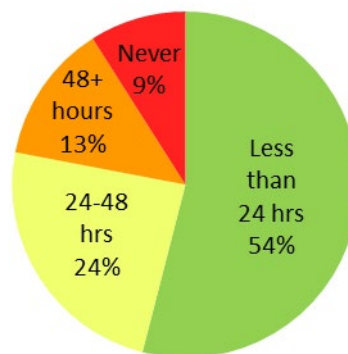
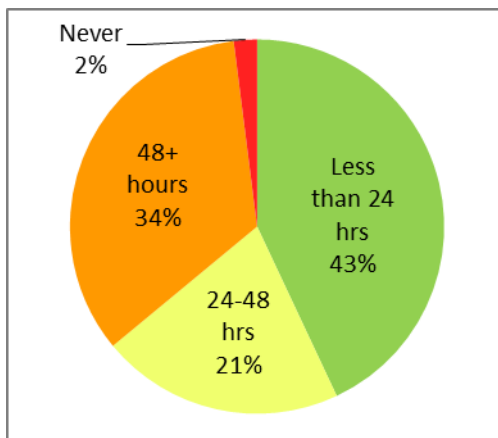


How long did it take to fix the water or plumbing problems? For those respondents who had problems, we asked how long it usually took for the problems to be fixed – less than 24 hours, 24 - 48 hours, more than 48 hours, or never fixed.

Boston Housing Authority

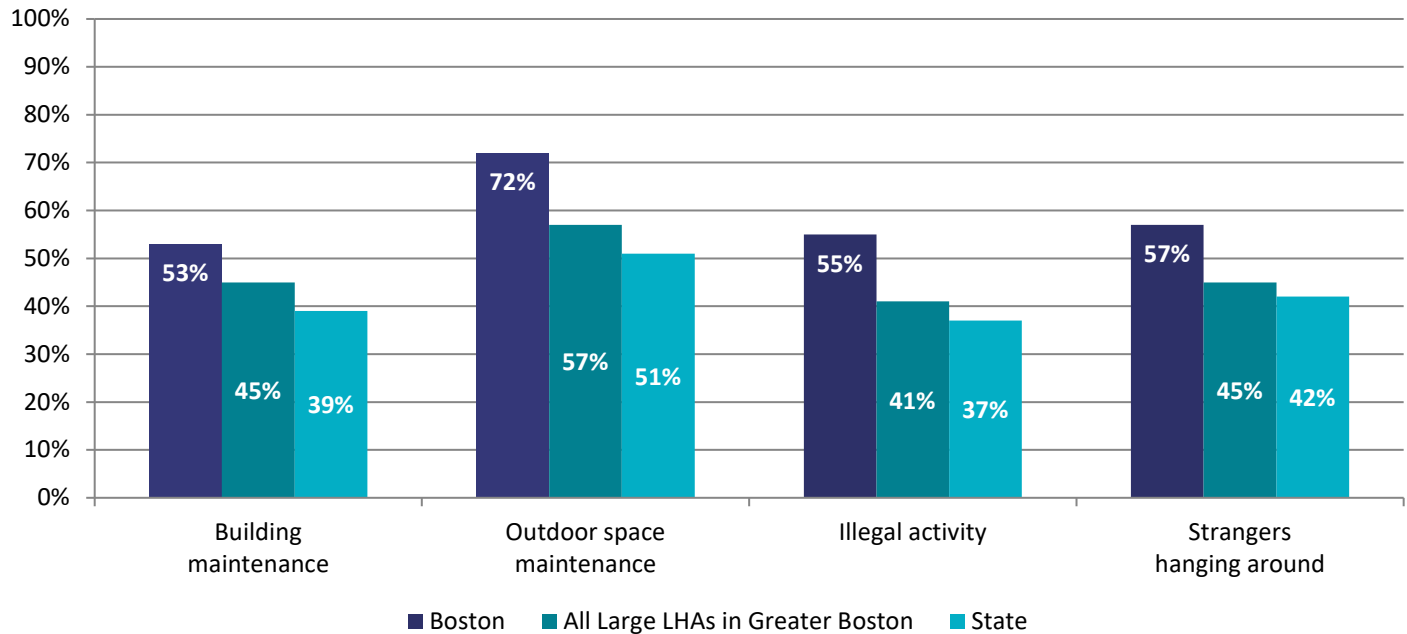
All Large LHAs in Greater Boston

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.

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”

