

North Attleborough Housing Authority

Annual Plan for Fiscal Year 2023

For State-Aided Public Housing

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

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

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

The North Attleborough Housing Authority's Annual Plan for their 2023 fiscal year includes the following components:

1. Overview and Certification
2. Capital Improvement Plan (CIP)
3. Maintenance and Repair Plan
4. Operating Budget
5. Narrative responses to Performance Management Review (PMR) findings
6. Policies
7. Waivers
8. Glossary
9. Other Elements
 - a. Combined LTO letters
 - b. Combined LTO Letter
 - c. Public Comments
 - d. Cover sheet for tenant satisfaction surveys
 - e. Tenant Satisfaction Survey 667 Program

State-Aided Public Housing Developments

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

Dev No	Type	Development Name	Num Bldgs	Year Built	Dwelling Units
667-01	Elderly	CIRCLE COURT 667-01	14	1967	104
705-02	Family	CLIFTON STREET 705-02	5	1985	10
667-02	Elderly	ELM TERRACE 667-02	2	1978	72
667-03	Elderly	SO WASHINGTON ST 667-03	1	1985	50
200-01	Family	VETERANS 200-01	20	1950	20
	Family	Family units in smaller developments	2		4
Total			44		260

The following development(s) operate under a combination of state and federal requirements, including HUD’s Section 8 New Construction and Substantial Rehabilitation Program (see the Glossary for a program description).

Dev No	Type	Development Name	Num Bldgs	Year Built	Dwelling Units
689-01	Other	HANDICAP 689-01	3	1982	12

Federally Assisted Developments

North Attleborough Housing Authority also manages Federally-assisted public housing developments and/or federal rental subsidy vouchers serving 104 households.

LHA Central Office

North Attleborough Housing Authority
20 South Washington Street, North Attleborough, MA, 02760
Daniel Ouellette, Executive Director
Phone: 508-695-5142
Email: Dan@northattleborohousing.org

LHA Board of Commissioners

	<u>Role</u>	<u>Category</u>	<u>From</u>	<u>To</u>
Lowell Kinch	Member		04/01/2020	03/31/2025
Rick Leco	Chair		04/01/2014	03/31/2019
Joan Liljander	Member	State Tenant Rep	04/03/2018	03/31/2023
Gloria Paton	Vice-Chair	State Appointee	07/01/2018	06/30/2021
Sheri Warsofsky			04/01/2021	03/31/2024

Local Tenant Organizations

	<u>Date of Recognition by LHA</u>	<u>Date LHA Reviewed Draft AP with LTO</u>
South Washington LTO	01/01/1991	03/03/2022
Circle Court LTO	01/01/1991	03/03/2022

Plan History

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

REQUIREMENT		DATE COMPLETED
A.	Advertise the public hearing on the LHA website.	02/23/2022
B.	Advertise the public hearing in public postings.	02/23/2022
C.	Notify all LTO's and RAB, if there is one, of the hearing and provide access to the Proposed Annual Plan.	02/23/2022
D.	Post draft AP for tenant and public viewing.	02/23/2022
E.	Hold quarterly meeting with LTO or RAB to review the draft AP. (Must occur before the LHA Board reviews the Annual Plan.)	03/03/2022
F.	Annual Plan Hearing. Hosted by the LHA Board, with a quorum of members present. (For Boston, the Administrator will host the hearing.)	04/14/2022
G.	Executive Director presents the Annual Plan to the Board.	04/14/2022
H.	Board votes to approve the AP. (For Boston Housing Authority, the Administrator approves and submits the AP.)	04/14/2022

Certification

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

I, Daniel Ouellette, Executive Director of the North Attleborough Housing Authority, certify on behalf of the Housing Authority that I have conducted an annual review of all North Attleborough Housing Authority users of DHCD Capital Software applications and Housing Applications and that all current LHA users are authorized to use the systems and have the appropriate level of user access based on their job responsibility. I approve all system access and access levels for all North Attleborough Housing Authority users.

This certification applies to the following applications:

- Capital Planning System (CPS)
- Consolidated Information Management System (CIMS)
- Cap Hub
- DHCD Housing Management Systems

CERTIFICATION FOR SUBMISSION OF THE ANNUAL PLAN

I, Daniel Ouellette, Executive Director of the North Attleborough 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: 04/19/2022

CERTIFICATION FOR SUBMISSION OF THE ANNUAL PLAN

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

The Board and Executive Director further certify that LHA operations and all LHA Board-adopted policies are in accordance with M.G.L. c. 121B and all Massachusetts state-aided public housing regulations, including, but not limited to 760 CMR 4.00; 5.00; 6.00; 8.00; and 11:00, as well as adhere to Department-promulgated guidance.

Date of certification: 04/19/2022

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.

Additional Remarks by North Attleborough Housing Authority

From 2021 --- During both tenant meetings residents voiced support for ALL these projects and their spread throughout the different developments.

Residents voted to support the proposed CIP plan in two separate meetings. (document attached)

At the public meeting Commissioner Leco requested the road signage be incorporated into the Elm Terrace Parking lot project.

To be updated after March 4, 2022

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

Category of Funds	Allocation	Planned Spending	Description
Balance of Formula Funding (FF)	\$1,000,330.21		Total of all FF awards minus prior FF spending
LHA Emergency Reserve	\$150,049.53		Amount to reserve for emergencies
Net FF Funds (First 3 Years of the CIP)	\$850,280.68	\$1,133,619.51	Funds to plan & amount actually planned in the first 3 years of the CIP
ADA Set-aside	\$17,978.12	\$17,978.12	Accessibility projects
DMH Set-aside	\$0.00	\$0.00	Dept. of Mental Health facility
DDS Set-aside	\$0.00	\$0.00	Dept. of Developmental Services facility
Unrestricted Formula Funding (FF)	\$832,302.55	\$1,115,641.39	Funds awarded by DHCD to be used on projects selected by the LHA and approved by DHCD.
Special DHCD Funding	\$289,554.43	\$289,554.43	Targeted awards from DHCD
Community Development Block Grant (CDBG) Funds	\$0.00	\$0.00	Federal funds awarded by a city or town for specific projects.
Community Preservation Act (CPA) Funds	\$0.00	\$0.00	Community Preservation Act funds awarded by a city or town for specific projects.
Operating Reserve(OR) Funds	\$0.00	\$0.00	Funds from the LHA's operating budget.
Other Funds	\$0.00	\$0.00	Funds other than those in the above categories. See explanation below.
Total funds and planned spending	\$1,139,835.11	\$1,423,173.94	Total of all anticipated funding available for planned projects and the total of planned spending.

Additional notes about funding:

Sustainability funding is utilized in several weatherization and energy conservation projects: attic insulation, etc.

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

Capital Improvement Plan (CIP)

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

Cap Hub Project Number	Project Name	Development(s)	Total Cost	Amount Spent Prior to Plan	Remaining Planned for 2022	fy2023 Planned	fy2024	fy2025	fy2026	fy2027
197052	2008 FF Master CFA	CIRCLE COURT 667-01	\$7,100	\$7,100	\$0	\$0	\$0	\$0	\$0	\$0
197084	FF: Mailbox Clusters	CIRCLE COURT 667-01	\$22,468	\$0	\$4,705	\$11,525	\$6,239	\$0	\$0	\$0
197099	FF: Awning Replacement	JEFFERSON ST/GOLDR RD 705-01	\$3,510	\$0	\$3,510	\$0	\$0	\$0	\$0	\$0
197106	FF: Smoke & Carbon Detector Replacement	SO WASHINGTON ST 667-03	\$8,320	\$4,797	\$3,524	\$0	\$0	\$0	\$0	\$0
197110	FF: Roof Replacement	CIRCLE COURT 667-01	\$467,605	\$447,669	\$0	\$0	\$0	\$0	\$0	\$0
197111	FF: Elevator Repairs	SO WASHINGTON ST 667-03	\$90,185	\$39,647	\$0	\$30,664	\$19,875	\$0	\$0	\$0
197117	FF: Ventilation System (Corridor Make-Up Air)	ELM TERRACE 667-02	\$9,997	\$0	\$0	\$9,997	\$0	\$0	\$0	\$0
197119	FF: Mailbox Replacement	VETERAN'S 200-01	\$4,135	\$4,135	\$6	\$0	\$0	\$0	\$0	\$0
197124	FY19 SUS Energy Insulation/Air Sealing	CIRCLE COURT 667-01	\$186,516	\$175,499	\$0	\$0	\$0	\$0	\$0	\$0
197126	2nd Elevator Initiative	SO WASHINGTON ST 667-03	\$3,141,728	\$1,536,814	\$243,341	\$0	\$0	\$0	\$0	\$0
197130	Stove Replacement - Elm Terrace	ELM TERRACE 667-02	\$51,159	\$51,249	\$0	\$0	\$0	\$0	\$0	\$0
197131	Additional Parking Spaces	ELM TERRACE 667-02	\$10,423	\$9,033	\$1,390	\$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	Remaining Planned for 2022	fy2023 Planned	fy2024	fy2025	fy2026	fy2027
197132	Fire AlarmSystem - Addressable	SO WASHINGTON ST 667-03	\$40,930	\$6,250	\$32,688	\$1,993	\$0	\$0	\$0	\$0
197134	Tree trimming and removal	CIRCLE COURT 667-01	\$7,538	\$6,700	\$838	\$0	\$0	\$0	\$0	\$0
197136	Selective tree trimming	CLIFTON STREET 705-02	\$9,500	\$2,500	\$7,000	\$0	\$0	\$0	\$0	\$0
197139	H&S FY20: Replace all exterior handrails at site steps		\$4,500	\$4,000	\$500	\$0	\$0	\$0	\$0	\$0
197140	H&S FY20: Pave uneven parking lot spots		\$5,000	\$4,900	\$100	\$0	\$0	\$0	\$0	\$0
197146	Sign Illumination	CIRCLE COURT 667-01	\$5,011	\$0	\$5,011	\$0	\$0	\$0	\$0	\$0
197147	Hot Water Heater Replacement	ELM TERRACE 667-02	\$110,758	\$9,837	\$11,965	\$98,793	\$0	\$0	\$0	\$0
197149	Elevator Repair Assessment	ELM TERRACE 667-02	\$36,217	\$23,859	\$12,774	\$0	\$0	\$0	\$0	\$0
197150	Community Center/Maintenance Garage (design)	ELM TERRACE 667-02	\$9,000	\$0	\$0	\$0	\$0	\$0	\$0	\$0
197151	Office & Reception-Paint & Carpet	SO WASHINGTON ST 667-03	\$12,100	\$0	\$12,100	\$0	\$0	\$0	\$0	\$0
197152	Trash Compactor Repairs	SO WASHINGTON ST 667-03	\$10,297	\$9,145	\$1,152	\$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	Remaining Planned for 2022	fy2023 Planned	fy2024	fy2025	fy2026	fy2027
197153	Boiler/Water Heater Replacement-Phase 1	CLIFTON STREET 705-02	\$50,956	\$9,500	\$0	\$41,456	\$0	\$0	\$0	\$0
197154	Window Replacement Phase 2	CIRCLE COURT 667-01	\$240,600	\$178,179	\$216,321	\$8,550	\$0	\$0	\$0	\$0
197155	Asbestos Flooring Abatement	CIRCLE COURT 667-01	\$78,268	\$49,375	\$0	\$28,893	\$0	\$0	\$0	\$0
197156	FF:Emergency Drain Repairs	VETERAN'S 200-01	\$28,000	\$27,500	\$0	\$0	\$0	\$0	\$0	\$0
197157	FF:Smith Street-Drain Repairs	VETERAN'S 200-01	\$17,800	\$15,401	\$0	\$0	\$0	\$0	\$0	\$0
197161	Parking Lot & Walkway Upgrades	ELM TERRACE 667-02	\$253,944	\$0	\$0	\$45,813	\$208,132	\$0	\$0	\$0
•	Attic Insulation Upgrade	VETERAN'S 200-01	\$43,641	\$0	\$0	\$0	\$0	\$43,641	\$0	\$0
•	Extraordinary Maintenance	VETERAN'S 200-01	\$11,344	\$0	\$0	\$0	\$0	\$11,344	\$0	\$0
•	Trees & Shrubs Removal	VETERAN'S 200-01	\$6,292	\$0	\$0	\$6,292	\$0	\$0	\$0	\$0
•	Exterior Paint Improvements	VETERAN'S 200-01	\$75,625	\$0	\$0	\$0	\$0	\$0	\$75,625	\$0
•	Storm Door Replacement	VETERAN'S 200-01	\$52,272	\$0	\$0	\$0	\$0	\$0	\$52,272	\$0
•	Parking Space Extension	VETERAN'S 200-01	\$12,100	\$0	\$0	\$0	\$0	\$12,100	\$0	\$0

Capital Improvement Plan (CIP)

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

Cap Hub Project Number	Project Name	Development(s)	Total Cost	Amount Spent Prior to Plan	Remaining Planned for 2022	fy2023 Planned	fy2024	fy2025	fy2026	fy2027
•	Sewer Pipe Replacement	VETERAN'S 200-01	\$9,883	\$0	\$0	\$0	\$0	\$9,883	\$0	\$0
•	Replace main electric service panels	VETERAN'S 200-01	\$90,524	\$0	\$0	\$0	\$0	\$0	\$0	\$90,524
•	Stove Replacement	CIRCLE COURT 667-01	\$91,129	\$0	\$0	\$0	\$0	\$0	\$91,129	\$0
•	Additional CCTV Cameras	CIRCLE COURT 667-01	\$3,781	\$0	\$0	\$3,781	\$0	\$0	\$0	\$0
•	Common Hallway Electrical Outlet	CIRCLE COURT 667-01	\$12,100	\$0	\$0	\$0	\$0	\$12,100	\$0	\$0
•	Window Replacement Phase - 3	CIRCLE COURT 667-01	\$274,428	\$0	\$0	\$86,520	\$187,909	\$0	\$0	\$0
•	Complete Kitchen & Bath Mod Units 61-63	CIRCLE COURT 667-01	\$297,796	\$0	\$0	\$0	\$0	\$0	\$0	\$5,860
•	Asphalt Sidewalk repair	CIRCLE COURT 667-01	\$48,134	\$0	\$0	\$48,134	\$0	\$0	\$0	\$0
•	Roof Replacement	ELM TERRACE 667-02	\$192,740	\$0	\$0	\$0	\$0	\$0	\$192,740	\$0
•	Countertop Replacement 5	ELM TERRACE 667-02	\$8,304	\$0	\$0	\$0	\$0	\$0	\$8,304	\$0
•	Second Elevator Installation	ELM TERRACE 667-02	\$1,258,400	\$0	\$0	\$0	\$0	\$0	\$113,334	\$431,991
•	Toilet Replacements - Sustainability Award	ELM TERRACE 667-02	\$56,601	\$0	\$0	\$56,601	\$0	\$0	\$0	\$0

Capital Improvement Plan (CIP)

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

Cap Hub Project Number	Project Name	Development(s)	Total Cost	Amount Spent Prior to Plan	Remaining Planned for 2022	fy2023 Planned	fy2024	fy2025	fy2026	fy2027
•	Door Hardware Card/Key System	ELM TERRACE 667-02	\$39,135	\$0	\$0	\$39,135	\$0	\$0	\$0	\$0
•	CCTV Cameras & WIFI Improvement	ELM TERRACE 667-02	\$4,840	\$0	\$0	\$4,840	\$0	\$0	\$0	\$0
•	Basement Humidifier & Exterior Lighting	ELM TERRACE 667-02	\$12,100	\$0	\$0	\$0	\$0	\$12,100	\$0	\$0
•	Countertop Replacement 4	SO WASHINGTON ST 667-03	\$5,431	\$0	\$0	\$5,431	\$0	\$0	\$0	\$0
•	Stove Replacement - South Washington	SO WASHINGTON ST 667-03	\$67,569	\$0	\$0	\$0	\$0	\$67,569	\$0	\$0
•	Hallway Light Fixtures Replacement	SO WASHINGTON ST 667-03	\$11,344	\$0	\$0	\$0	\$0	\$11,344	\$0	\$0
•	Sprinkler Flow Switch Replacement	SO WASHINGTON ST 667-03	\$10,588	\$0	\$0	\$0	\$0	\$0	\$10,588	\$0
•	Plumbing Stack Shut-Off Valve	SO WASHINGTON ST 667-03	\$9,438	\$0	\$0	\$9,438	\$0	\$0	\$0	\$0
•	CCTV Cameras & WIFI Improvement	SO WASHINGTON ST 667-03	\$4,538	\$0	\$0	\$4,538	\$0	\$0	\$0	\$0
•	ADA Showers	SO WASHINGTON ST 667-03	\$66,624	\$0	\$0	\$0	\$0	\$66,624	\$0	\$0
•	Window Replacement	JEFFERSON ST/GOLDR RD 705-01	\$55,503	\$0	\$0	\$0	\$0	\$0	\$0	\$55,503

Capital Improvement Plan (CIP)

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

Cap Hub Project Number	Project Name	Development(s)	Total Cost	Amount Spent Prior to Plan	Remaining Planned for 2022	fy2023 Planned	fy2024	fy2025	fy2026	fy2027
•	Hallway Carpet Replacement & Painting	JEFFERSON ST/GOLDR RD 705-01	\$7,865	\$0	\$0	\$0	\$0	\$7,865	\$0	\$0
•	Bathroom Upgrade	CLIFTON STREET 705-02	\$12,100	\$0	\$0	\$0	\$0	\$0	\$12,100	\$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	Sustainability	Special Awards	CDBG	CPA	Operating Reserve	Other Funds
197124	FY19 SUS Energy Insulation/Air Sealing	Air Sealing & insulation after roof replacements	\$0	\$0	\$186,516	\$0	\$0	\$0	\$0	\$0
197126	2nd Elevator Initiative	2nd Elevator	\$0	\$18,950	\$0	\$1,782,745	\$0	\$0	\$0	\$1,358,983
197139	H&S FY20: Replace all exterior handrails at site steps	H&S FY20: Replace all exterior handrails at site steps	\$0	\$0	\$0	\$4,500	\$0	\$0	\$0	\$0
197140	H&S FY20: Pave uneven parking lot spots	H&S FY20: Pave uneven parking lot spots	\$0	\$0	\$0	\$5,000	\$0	\$0	\$0	\$0
197150	Community Center/Maintenance Garage (design)		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$9,000
197155	Asbestos Flooring Abatement	unit turnovers asbestos removal 5-6 units	\$0	\$78,268	\$0	\$0	\$0	\$0	\$0	\$0
197156	FF:Emergency Drain Repairs	sewer drain line repairs	\$28,000	\$0	\$0	\$0	\$0	\$0	\$0	\$0

Capital Improvement Plan (CIP) Narrative

Including Requests to DHCD & Supporting Statements

1. Request for increased spending flexibility.

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

North Attleborough Housing Authority has submitted an Alternate CIP with the following justifica

- Projected spending on projects currently in bidding or construction exceeds Cap Share in one or more years of the CIP.
- The TDC for a proposed project exceeds the Cap Share for a single year and it doesn't make sense to spread it

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

2. The TDC for a proposed project exceeds the Cap Share for a single year and it doesn't make sense to spread it over multiple 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.

North Attleborough Housing Authority has requested \$1,258,400.00 in DHCD Compliance Reserve funding for project #197-667-02-0-20-1248, Second Elevator Installation. Reason: 2nd elevator is required, and funding shall be from the DHCD "Second Elevator Program" - PHN 2015-22

North Attleborough Housing Authority has requested \$56,601.00 in DHCD Sustainability funding for project #197-667-02-0-20-1459, Toilet Replacements - Sustainability Award. Reason: Toilet Replacement

3. Overall goals of the Housing Authority's CIP

NAHA intends to maintain and improve our properties to ensure that our residents' homes remain better than "decent, safe, and sanitary". This foster home setting and protect the state's investment.

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 2023 expands the list of projects to those most necessary at this time.

5. Requirements of previous CIP approval

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

6. Quarterly capital reports

Our most recent quarterly capital report (form 80 and 90) was submitted on 04/15/2022.

7. Capital Planning System (CPS) updates

Our CPS facility data has been updated with current condition information, including changes resulting from projects completed in the past year, as of 11/10/2021.

8. Project priorities

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

9. High priority deficiencies

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

10. Accessibility

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

11. Special needs development

North Attleborough 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 11/01/2021.

12. Energy and water consumption

Our 12 most recent monthly energy reports are for months 10/2020 to 9/2021.

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

	Electric PUM > Threshold	Gas PUM > Threshold	Oil PUM > Threshold	Water PUM > Threshold
Threshold PUM:	\$100	\$80	\$50	\$60

705-01

No developments exceed threshold values.

We advised tenants to close the windows when the heat is on.

13. Energy or water saving initiatives

North Attleborough 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.)

5% c. 667 (DHCD Goal 2%)

0% c. 200 (DHCD Goal 2%)

0% c. 705 (DHCD Goal 2%)

North Attleborough Housing Authority will address the excess vacancies in the following manner:

Project for apartment rehab will speed the return to occupancy. NAHA also included two projects for Labor Contract costs for rehabs to augment our staff limits. Mass NAHRO has proposed Legislation to add Maintenance staff.

Maintenance and Repair Plan

Maintenance Objective

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

About This Maintenance and Repair Plan

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

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

Classification and Prioritization of Maintenance Tasks

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

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

Additional Remarks by the North Attleborough Housing Authority

PHA-Web

Emergency Request System

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

METHOD	CONTACT INFO.	TIMES
Call Answering Service	617 629 1677	24/7
Call LHA at Phone Number	508-695-5142	Mon-Wed 8 AM - 4:30 PM Thurs 8 A

Almost 100% smoke detectors hard wire with battery back-up only
12 homes at Falmouth Street and Clifton Street remain battery-powered only. (noted in PHA-Web)

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 North Attleborough 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
No heat
No hot water
Snow or ice hazard condition
Dangerous structural defects
Elevator stoppage or entrapment

Normal Maintenance Request Process

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

METHOD	CONTACT INFO.	TIMES
Text Phone Number		
Call Answering Service	617 629 1677	24/7
Call Housing Authority Office	508-695-5142	Mon-Wed 8 AM - 4:30 PM Thurs 8 AM - 6
Submit Online at Website		
Email to Following Email		
Other		

Work Order Management

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

Type of work order system:

Work order classification used:

Emergency	
Vacancy	
Preventative Maintenance	
Routine	
Inspections	
Tenant Requests	

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

C. Our work order process includes the following steps:

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

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

NAHA follows DHCD Maintenance recommendations with no known changes.

Maintenance Plan Narrative

Following are North Attleborough 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?

Excellent- Exceeds expectation. Rehab work and repairs go beyond basic and strive for durable.

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

Adjusted the Maintenance Plan outlines to reflect achievable task schedules; and eliminated un-related tasks from the "form".

Fine-tuned (i.e. changed fire extinguisher inspections from annual to monthly; etc.)

Hired PT temporary staff to assist daily janitorial tasks and in rehabs.

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

Streamline rehab process using contractors and temp staff

Re-assess the Maintenance Plan scheduled Work Orders

Implement electronic Work Order System (PHA_WEB)

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	\$458,922.00	\$127,702.00
Last Fiscal Year Actual Spending	\$418,036.00	\$116,375.00
Current Fiscal Year Budget	\$463,771.00	\$38,200.00

E. Unit Turnover Summary

# Turnovers Last Fiscal Year	18
Average time from date vacated to make Unit "Maintenance Ready"	63 days
Average time from date vacated to lease up of unit	78 days

Attachments

These items have been prepared by the North Attleborough 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.

Dwelling Unit Inspections Schedule and Checklist *REVISED 1/2022

LHA NAME: North Attleboro			DEVELOPMENT: Circle Court 667-1											
Pondside Court														
TASK	Frequency	By	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Bldg. 13-15,17-19	Annually	Staff											X	
Bldg. 21-23, 25-27	Annually	Staff											X	
Bldg. 29-31, 33-35	Annually	Staff											X	
Bldg. 37-39, 41-43	Annually	Staff											X	
Bldg. 45-47, 49-51	Annually	Staff											X	
Bldg. 53-55, 57-59	Annually	Staff											X	
Bldg. 61-63	Annually	Staff											X	
Scattered Sites														
Heat and smoke detectors														
Battery Heat / Smoke Detectors - Inspect Condition	Annually	Staff											X	
Inspect System Heat detectors (in Units)	Annually	Vendor										X		
Pest control														
Inspect Unit	Monthly / Quarterly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Floors, Ceilings, Walls														
Floors (Vinyl)	Annually												X	
Kitchen fixtures														
KITCHEN - Inspect Appliances	Annually	Staff											X	
Kitchen, Bath - Cabinets, fixtures	Annually	Staff											X	
HVAC fixtures														
Electric Baseboards and Thermostats	Annually	Staff											X	

Routine Maintenance Schedule and Checklist Revised 1/2022

LHA NAME: North Attleboro

DEVELOPMENT: Elm Terrace 667-2

Landscaping and Grounds Routine Maintenance

Building Exterior

TASK	Frequency	By	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Walk property-pick up trash	Daily	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Mow lawn (Mulching lawnmower); edge if needed	Bi-Weekly / Seasonal	Staff				X	X	X	X	X	X	X		
Rake leaves, leaf vac(Fall, Spring)	Bi-Annually	Staff			X								X	
Snow (Shovel, Plow), Treat (Walkways)	Daily / Seasonal	Staff	X	X	X								X	X
Seasonal cleaning (Spring and Fall)	Start & End of Season				X								X	

Building Routine Maintenance

Building Interior

TASK	Frequency	By	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Hallways, Stairs, Lobbies, Community Rm - Sweep, mop floors, sweep and Vacuum public spaces	Weekly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Wash windows in public areas	As Needed	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Toilets - Clean public toilets/restrooms	Daily / Weekly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Maintenance Shop- Organize	Weekly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Maintenance Shop- Sweep , Mop	Weekly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Light Bulbs - Replace if burnt out	As Needed	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Elevators- Clean cab walls and doors	Daily / Weekly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Sweep / Mop / Vacuum elevator floor mats	Daily / Weekly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Trash Chutes, Dumpsters- Clean trash chutes	Daily / Weekly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Clean dumpster areas	Twice a week	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Check all recycling and trash rooms. Swap barrels as needed	Daily	Staff	X	X	X	X	X	X	X	X	X	X	X	X

Routine Maintenance Schedule and Checklist Revised 1/2022

LHA NAME: North Attleboro

DEVELOPMENT: Elm Terrace 667-2

Other Routine Maintenance

Inventory, Meeting, Training, Tools

TASK	Frequency	By	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Maintain Authority inventory	Quarterly	Staff			X			X			X			X
Attend Staff meetings	Weekly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Attend Training sessions	Bi-Annually	Staff						X			X			
Clean and sharpen tools	As Needed	Staff	X	X	X	X	x	X	X	X	X	X	X	X
Sharpen mower blades	As Needed	Staff				X	X	X	X	X	X			

NOTE:

Routine (and Emergency) Work Orders are generated will be created due to results from Inspections Maintenance Tasks.

Routine Maintenance Schedule and Checklist *REVISED 1/2022

LHA NAME: North Attleboro

DEVELOPMENT: South Washington St. 667-3

Landscaping and Grounds Routine Maintenance

Building Exterior

TASK	Frequency	By	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Walk property-pick up trash	Daily	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Mow lawn (Mulching lawnmower); edge if needed	Bi-Weekly / Seasonal	Staff				X	X	X	X	X	X	X		
Rake leaves (Fall, Spring)	Bi-Annually	Staff				X							X	
Snow (Shovel, Plow), Treat (Walkways)	Daily / Seasonal	Staff	X	X	X	X							X	X
Seasonal cleaning (Spring and Fall)	Start & End of Season	Staff			X								X	
Blow or Sweep front/Rear Walkways	As Needed	Staff	X	X	X	X	X	X	X	X	X	X	X	X

Building Routine Maintenance

Building Interior

TASK	Frequency	By	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Hallways, Stairs, Lobbies, Community Rm - Vacuum carpet, mop floors,	Daily as Needed	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Wash windows in public areas	As Needed	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Toilets - Clean public toilets/restrooms	Daily	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Clean Staff toilets/restrooms	Daily	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Offices- Sweep / Vacuum offices	Weekly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Light Bulbs - Replace if burnt out in common areas and offices	Weekly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Elevators- Clean cab walls and doors	Weekly as Needed	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Sweep / Mop / Vacuum elevator floors	Daily as Needed	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Trash Chutes, Dumpsters- Clean trash chutes	Daily / Weekly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Clean dumpster areas	As Needed	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Maintenance Shop- Organize	Weekly	Staff	X	X	X	X	X	X	X	X	X	X	X	X

Routine Maintenance Schedule and Checklist *REVISED 1/2022

LHA NAME: North Attleboro				DEVELOPMENT: South Washington St. 667-3											

Other Routine Maintenance

Inventory, Meeting, Training, Tools

TASK	Frequency	By	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Maintain Authority inventory	Quarterly	Staff			X			X			X			X
Attend Staff meetings	Weekly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Attend Training sessions	As Needed	Staff												
Maintain Tools and Equipimnet	Monthly	Staff	X	X	X	X	X	X	X	X	X	X	X	X

NOTE:

Routine (and Emergency) Work Orders are generated will be created due to results from Inspections Maintenance Tasks.

Preventive Maintenance Schedule and Checklist *REVISED 1/2022

LHA NAME: North Attleboro

Falmouth/Smith, Jeff/Goldie, Clifton, Hope

Buildings & Grounds Preventive Maintenance

Building Envelope													Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
TASK	Frequency	By	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec										
SLOPED ROOF - Remove moss, clear debris from gutters/downspouts	Bi-Annually	Staff / Vendor				X							X											
Recaulk roof flashing	Every 2 Yrs / As Needed	Staff / Vendor				X																		
WALLS - Repair Siding and Trim (as needed)	Annually / As Needed	Staff / Vendor				X																		
WINDOWS - Wash, re-caulk if needed	As Needed	Tenant																						
DOORS - Wash, check weather stripping, re-paint as needed	Annually	Staff					X																	
DECKS, EXT STAIRS - Wash	Annually	Staff					X																	
FOUNDATION - Check cracks, vent covers	Annually	Staff					X																	
EXTERIOR SURFACES, FIXTURES - Refinish	Every 10yrs	Staff / Vendor																						
Building Interior																								
VINYL FLOORS - Refinish, polish	As Needed	Staff																						
CEILINGS - Refinish	As Needed	Staff																						
WALLS - Refinish	As Needed	Staff																						
WALLS - Recaulk (kitchen and bath)	As Needed	Staff																						
FLOORS - Professionally clean common area	N/A																							
WALLS - Wash off hand prints and dirt in high	Weekly	Staff	X	X	X	X	X	X	X	X	X	X	X	X										
Pest Control																								
PEST CONTROL - Notify residents, Apply Chemicals	Monthly / As Needed	Vendor	X	X	X	X	X	X	X	X	X	X	X	X										
Common Kitchen, Laundry																								
KITCHEN - Clean Range, Microwave, Refrigerator	N/A																							
GAS STOVE - Valve and line cleaning	N/A																							
LAUNDRY - Wipe surfaces, empty trash, mop floor, clean behind machines, check lint traps and clean as needed	Weekly	Resident	X	X	X	X	X	X	X	X	X	X	X	X										
LAUNDRY - Professionally clean dryer vents	Annually	Resident									X													

Preventive Maintenance Schedule and Checklist *REVISED 1/2022

LHA NAME: North Attleboro

Falmouth/Smith, Jeff/Goldie, Clifton, Hope

Buildings & Grounds Preventive Maintenance

TASK	Frequency	By	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Trash / Recycling Room														
Clean, mop floor, wash out containers	Weekly	Resident	X	X	X	X	X	X	X	X	X	X	X	X
Cans (Trash / Recycle) - Regular pickup	Weekly	Resident	X	X	X	X	X	X	X	X	X	X	X	X
Landscaping														
Mulch landscape beds	Annually	Resident				X								
Shrubs, Trees (remove broken, dead, deformed branches)	Weekly / Seasonal	Resident	X	X	X	X	X	X	X	X	X	X	X	X
Remove weeds (don't let weeds go to seed)	Daily	Resident	X	X	X	X	X	X	X	X	X	X	X	X
Protect Shrubs (winter)	Seasonally	Resident										X	X	
Irrigation System														
Open/Close Silcocks	Bi-Annually	Staff					X					X		
Grounds														
Signage - inspect, clean, repair as needed	Monthly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Walks, Paving, Curbs - monitor, clean, repair as needed	Monthly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Parking Lot - Monitor condition, clean and reseal as needed	Annually	Staff / Vendor									X			
Fence - monitor condition, clean and repaint as needed	Annually	Staff					X							

Preventive Maintenance Schedule and Checklist *REVISED 1/2022

LHA NAME: North Attleboro

Falmouth/Smith, Jeff/Goldie, Clifton, Hope

Mechanical, Electrical Systems Preventive Maintenance

HVAC (Heating, Ventilation, Air Conditioning)

TASK	Frequency	By	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
FURNACE, AHU - Filter Changing / Cleaning, Service	Annually	Vendor									X			
Duct Cleaning - Clean, Replace as needed	As Needed	Vendor												

Water system

Test / Check Water Temperatures/Pressure	Annually	Staff										X		

Plumbing

Toilets - check for leaks, running water	Annually	Staff										X		
Faucets and shut-offs - check for leaks, drips	Annually	Staff										X		
Boilers/HW Tanks - Inspect, service	Annually	Vendor									X			
Pumps - sump pump in basement, confirm operational	Bi-Annually	Staff					X					X		

Fire Sprinklers

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Sanitary system

Replace toilet mechanism	As Needed	Staff												

Storm drain system

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Electrical system

Tighten connections in transformers and junctions	As Needed	Vendor	Recommended by DHCD's Handbook.											
Clean, Test	As Needed	Vendor	However, if this was never performed, then it should be performed by licensed EC after an infrared test by a Testing Company											

Fire Alarms

Hardwired System, Test and Replace Back-Up Batt	Annually	Staff						X						
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Preventive Maintenance Schedule and Checklist *REVISED 1/2022

LHA NAME: North Attleboro

Falmouth/Smith, Jeff/Goldie, Clifton, Hope

Mechanical, Electrical Systems Preventive Maintenance

Generator			Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
TASK	Frequency	By												
Test	N/A													
Lubricate	N/A													
Small Generators	N/A													
Emergency Lighting (Not on Generator)														
Replace batteries	N/A													
Test	N/A													
ALL Light Fixtures														
Lighting - replace lamps as needed	Monthly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Security systems														
	N/A													
Elevator system														
	N/A													
Solid waste disposal system														
Clean compactors, Lubricate machinery	N/A													
Lubricate trash chute doors	N/A													

Preventive Maintenance Schedule and Checklist *REVISED 1/2022

LHA NAME: North Attleboro

Falmouth/Smith, Jeff/Goldie, Clifton, Hope

Dwelling Unit Preventive Maintenance

Heat and smoke detectors

TASK	Frequency	By	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Smoke/CO Detectors - Test, Change batteries (Family Units)	Annually	Staff						X						
Smoke detectors - Test, Change batteries (Handicap Units))	Annually	Staff					X							
Hardwire System Test (Handicap Units)	Annually	Vendor												X

Pest control

Notify Residents, Install Chemicals	Monthly / As Needed	Vendor	X	X	X	X	X	X	X	X	X	X	X	X
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Floors

Refinish floors	At Turnover / As Needed													
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Ceilings

Refinish	At Turnover / As Needed													
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Walls

Refinish	At Turnover / As Needed													
Recaulk (kitchen and bath)	At Turnover / As Needed													

Kitchen fixtures

KITCHEN - Clean Range, Microwave, Refrigerator	As Needed	Resident									X			
GAS STOVE - Valve and line cleaning	As Needed	Vendor									X			
UNIT APPLIANCES - clean interior and exterior, vacuum under and behind	As Needed	Resident						X						

HVAC fixtures

Unit Forced Hot Water - Check for Air locks, Bleed	Annually	Vendor											X	
Unit Electrical Baseboard - Vacuum around fins	Annually	Resident											X	
Unit Forced Hot Air - Vacuum Vents	Annually	Resident											X	
Unit Bathroom Fans - Inspect, Vacuum, Clean covers	Annually	Resident						X						

Machine Preventive Maintenance

Automobile

TASK	Frequency	By	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Lubricate, Change Filters	Per Manufacturers Recommendations	Vendor										X		
Change tires	Rotate Annually	Vendor										X		
Replace brakes, other fixed life parts	Per Manufacturers Recommendations	Vendor										X		
Annual Sticker (Vehicles, Trailers)	Annually (Varies)	Vendor												

Small Engines

ALL WORK by Service Contract	Per Manufacturers Recommendations	Vendor										X		
OIL - Check Level , Change, Replace Filter	Per Manufacturers Recommendations	Staff										X		
Air Filter - Replace Foam/Paper Air cleaner	Per Manufacturers Recommendations (OR Every Season)	Staff										X		
Replace Spark Plug, In-line Fuel Filter	Per Manufacturers Recommendations (OR Every 100 Hrs)	Staff										X		
Prep Work Season Start, Season End)	Bi-Annually	Staff			X							X		
Snow Removal and Sanding Equipment	After Use											X		

Preventive Maintenance Schedule and Checklist *REVISED 1/2022

LHA NAME: North Attleboro

Falmouth/Smith, Jeff/Goldie, Clifton, Hope

No Attleboro Housing Authority Deferred Work Order Report

Filter Criteria Includes: 1) Project: All Projects, 2) Deferred Type: All Types, 3) Deferred Note: N/A, 4) Completed: All

Work Order Number	Completed Date/Time	Deferred Note	Deferred Type
6794	5/1/2019 12:00 PM	DEFER TO SUMMER	Deferred Maintenance Plan
6836	6/28/2018 3:30 PM	Pending for Spring	Capital Improvement Plan
7252	11/6/2018 3:45 PM	Reasonable accommodations	Deferred Maintenance Plan
7379	1/14/2019 12:00 AM	Will monitor as needed	Deferred Maintenance Plan
7470	1/18/2019 11:50 AM	OUTSIDE CONTRACT TO REPAIR	Deferred Maintenance Plan
7690	1/27/2019 9:30 AM	REPAIR TO CEILING 1 WEEK	Deferred Maintenance Plan
7852	3/14/2019 1:00 PM	Waiting for funding	Deferred Maintenance Plan
8040	7/1/2019 8:30 AM	DEFERRED TO SUMMER HELP	Deferred Maintenance Plan
8041	8/15/2019 8:00 AM	PER JOE H	Deferred Maintenance Plan
8046	8/21/2019 8:00 AM	DEFER TO SUMMER 2019 - 90 DAYS	Deferred Maintenance Plan
8298	7/28/2019 2:00 PM	DEFERRED NEW FISH PROJECT	Deferred Maintenance Plan
8454	12/4/2020 8:00 AM	Defer for 90 days	Deferred Maintenance Plan
8461	12/4/2020 8:00 AM	Defer for 90 days	Deferred Maintenance Plan
8465	12/4/2020 8:00 AM	Defer for 90 days	Deferred Maintenance Plan
8469	12/4/2020 8:00 AM	Defer for 90 days	Deferred Maintenance Plan
8471	12/4/2020 8:00 AM	DEFER 60 DAYS	Deferred Maintenance Plan
8473	12/4/2020 8:00 AM	DEFER 60 DAYS	Deferred Maintenance Plan
8478	10/18/2019 1:00 PM	Defer for 30 days per DAN	Deferred Maintenance Plan
8480	12/4/2020 8:00 AM	DEFER 90 DAYS	Deferred Maintenance Plan
8481	12/4/2020 8:00 AM	DEFER 60 DAYS	Deferred Maintenance Plan
8482	12/4/2020 8:00 AM	DEFER 90 DAYS	Deferred Maintenance Plan
8495	12/4/2020 8:00 AM	DEFER 90 DAYS	Deferred Maintenance Plan
8529	12/4/2020 8:00 AM	Defer for 90 days	Deferred Maintenance Plan
8531	12/4/2020 8:00 AM	Defer for 90 days	Deferred Maintenance Plan
8533	12/4/2020 8:00 AM	Defer for 90 days	Deferred Maintenance Plan
8536	12/4/2020 8:00 AM	Defer for 60 days	Deferred Maintenance Plan
8537	12/4/2020 8:00 AM	Defer for 90 days	Deferred Maintenance Plan
8538	12/4/2020 8:00 AM	Defer for 90 days	Deferred Maintenance Plan
8543	12/4/2020 8:00 AM	Defer for 60 days	Deferred Maintenance Plan
8548	12/4/2020 8:00 AM	Defer for 60 days	Deferred Maintenance Plan
8555	12/4/2020 8:00 AM	Defer for 60 days	Deferred Maintenance Plan
8568	9/24/2019 10:00 AM	60 DAYS PER ERIC G	Deferred Maintenance Plan
8620	3/11/2020 8:00 AM	COVID	Deferred Maintenance Plan
8621	3/11/2020 8:00 AM	COVID 19	Deferred Maintenance Plan
8645	3/11/2020 8:00 AM	COVID	Deferred Maintenance Plan
8646	3/11/2020 8:00 AM	COVID	Deferred Maintenance Plan
8652	10/3/2019 12:15 PM	Paint - Deferred Maint	Deferred Maintenance Plan
8659	12/4/2020 8:00 AM	Defer for 30 days	Deferred Maintenance Plan
8660	12/4/2020 8:00 AM	Defer for 60 days	Deferred Maintenance Plan
8663	12/4/2020 8:00 AM	Defer for 60 days	Deferred Maintenance Plan
8664	12/4/2020 8:00 AM	Defer for 90 days	Deferred Maintenance Plan
8721	5/1/2021 8:00 AM	S	Deferred Maintenance Plan
8722	3/11/2020 8:00 AM	COVID	Deferred Maintenance Plan
8723	3/11/2020 8:00 AM	COVID	Deferred Maintenance Plan
8725	3/11/2020 8:00 AM	COVID	Deferred Maintenance Plan
8730	3/11/2020 8:00 AM	COVID	Deferred Maintenance Plan
8732	3/11/2020 8:00 AM	COVID	Deferred Maintenance Plan
8733	3/11/2020 8:00 AM	COVID	Deferred Maintenance Plan
8745	3/11/2020 8:00 AM	COVID 19	Deferred Maintenance Plan
8765	4/1/2020 8:00 AM		Deferred Maintenance Plan

No Attleboro Housing Authority Deferred Work Order Report

Filter Criteria Includes: 1) Project: All Projects, 2) Deferred Type: All Types, 3) Deferred Note: N/A, 4) Completed: All

8768	3/11/2020 8:00 AM	COVID 19	Deferred Maintenance Plan
8772	12/4/2020 8:00 AM	Defer for 60 days	Deferred Maintenance Plan
8787	12/9/2019 8:00 AM		Deferred Maintenance Plan
8792	4/1/2020 8:00 AM		Deferred Maintenance Plan
8794	4/1/2020 8:00 AM		Deferred Maintenance Plan
8801	4/1/2020 8:00 AM		Deferred Maintenance Plan
8802	3/11/2020 8:00 AM	COVID 19	Deferred Maintenance Plan
8823	4/1/2020 8:00 AM		Deferred Maintenance Plan
8825	12/4/2020 8:00 AM	Defer for 30 days	Deferred Maintenance Plan
8831	12/4/2020 8:00 AM	Defer for 30 days	Deferred Maintenance Plan
8851	3/11/2020 8:00 AM	COVID 19	Other
8856	3/11/2020 8:00 AM	DUE TO COVID 19	Other
8869	12/4/2020 8:00 AM	Defer for 60 days	Deferred Maintenance Plan
8870	12/4/2020 8:00 AM	Defer for 60 days	Deferred Maintenance Plan
8871	12/4/2020 8:00 AM	Defer for 90 days	Deferred Maintenance Plan
8872	12/4/2020 8:00 AM	Defer for 90 days	Deferred Maintenance Plan
8956	12/4/2020 8:00 AM	Defer for 60 days	Deferred Maintenance Plan
8999	3/11/2020 8:00 AM	COVID 19	Deferred Maintenance Plan
9037	12/4/2020 8:00 AM	DEFER 60 DAYS	Deferred Maintenance Plan
9105	12/4/2020 8:00 AM	DEFER 90 DAYS	Deferred Maintenance Plan
9129	1/15/2020 8:00 AM	To be ordered on next Home Depot supply order	Deferred Maintenance Plan
9209	12/4/2020 8:00 AM	DEFER 60 DAYS	Deferred Maintenance Plan
9353	12/4/2020 8:00 AM	Defer for 60 days	Deferred Maintenance Plan
9436	12/4/2020 8:00 AM	Defer for 90 days	Deferred Maintenance Plan
9541	12/4/2020 8:00 AM	Defer for 30 days	Deferred Maintenance Plan
9556	12/4/2020 8:00 AM	DEFER 30 DAYS	Deferred Maintenance Plan
9596	12/1/2020 12:00 PM	Defer lack of personel per Dan O	Deferred Maintenance Plan
9633	12/4/2020 8:00 AM	Defer for 60 days	Deferred Maintenance Plan
9672	12/3/2020 8:30 AM	Deferred to May 2021 by Dan O	Deferred Maintenance Plan
9760	12/4/2020 8:00 AM	Defer 90 days	Deferred Maintenance Plan
9772	12/4/2020 8:00 AM	Defer for 60 days	Deferred Maintenance Plan
9848	12/4/2020 8:00 AM	Defer 60 days	Deferred Maintenance Plan
9917	12/4/2020 8:00 AM	Defer for 90 days	Deferred Maintenance Plan
9923	10/14/2020 1:00 PM	Defer due to Covid 19 restrictions	Other
9935	10/28/2020 8:00 AM	DUE TO COVID19	Deferred Maintenance Plan
9936	10/28/2020 8:00 AM	DUE TO COVID 19	Deferred Maintenance Plan
9970	12/4/2020 8:00 AM	Defer for 60 days	Deferred Maintenance Plan
9977	12/30/2020 8:00 AM	LATER DATE PER DAN	Deferred Maintenance Plan
10060	11/24/2020 2:31 PM		Capital Improvement Plan
10101	4/20/2021 10:00 AM	Deferred when units are turned over during reha	Deferred Maintenance Plan
10116	1/12/2021 8:00 AM	Defer due to Covid 19 Restrictions	Other
10180	1/12/2021 8:00 AM	Defer due to Covid 19 restrictions	Other
10469	4/5/2021 10:15 AM	Valve needs to be replaced	Deferred Maintenance Plan
10513	4/16/2021 11:43 AM		Capital Improvement Plan
10757	1/30/2022 8:00 AM	Defer 90 days	Deferred Maintenance Plan
10882	1/30/2022 8:00 AM	Defer 90 days	Deferred Maintenance Plan
11046	1/30/2022 8:00 AM	Defer 90 days	Deferred Maintenance Plan
11447	1/10/2022 9:00 PM	Defer 30 days	Deferred Maintenance Plan

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 06/30/2021. It also shows the approved budget for the current year (2022) if there is one, and the percent change from last year's spending to this year's approved budget. The final column shows the current approved amount for each account divided by the number of housing units and by 12 months to show the amount per unit per month (PUM). The chart does not show a draft budget for the coming fiscal year as that will typically be developed in the final month of the fiscal year.

The budget format and accounts are mandated by the Department of Housing and Community Development (DHCD). For a better understanding of the accounts and discussion of special situations see the notes following the budget tables and the "Definitions of Accounts" at the end of this section.

The LHA maintains a consolidated budget (400-1) for all state-aided 667 (Elderly), 200 (family), and 705 (scattered site family) developments owned by the LHA. It does not maintain separate budgets for each development.

Operating Reserve

The LHA's operating reserve is the amount of funds that an LHA sets aside to sustain itself during lean years, or to remedy urgent health and safety concern or address deferred maintenance items. In addition, while DHCD approves a fixed non-utility operating budget level for every LHA (called the Allowable Non-Utility Expense Level, or ANUEL), LHAs can propose a budget that exceeds that level, with the additional cost to be funded from the Operating Reserve, as long as the reserve will still remain above the minimum threshold set by DHCD.

DHCD defines a full (100%) Operating Reserve (OR) amount to be equal to one-half of the previous year's operating expenses and requires LHAs to maintain a minimum OR of 35% of this amount to cover any unplanned but urgent needs that may arise during the year and that can't be funded by the operating budget. If the reserve is between 20% and 35% of the full level, the LHA must obtain prior written approval from DHCD to spend reserve funds, unless the expense is to resolve a health and safety issue. If the reserve is below the 20% level, the LHA can only spend OR funds on health and safety issues. In both cases, the LHA should address the health and safety issue immediately but must retroactively inform DHCD and obtain its approval.

The North Attleborough Housing Authority operating reserve at the end of fiscal year 2021 was \$472,446.00, which is 66.6% of the full reserve amount defined above.

Consolidated Budget (400-1) for all state-aided 667 (Elderly), 200 (family), and 705 (scattered site family) developments owned by North Attleborough Housing Authority.						
REVENUE						
Account Number	Account Class	2021 Approved Revenue Budget	2021 Actual Amounts Received	2022 Approved Revenue Budget	% Change from 2021 Actual to 2022 Budget	2022 Dollars Budgeted per Unit per Month
3110	Shelter Rent - Tenants	\$1,210,560.00	\$1,211,265.00	\$1,226,220.00	1.2%	\$393.02
3111	Shelter Rent - Tenants - Fraud/Retroactive	\$0.00	\$0.00	\$0.00	0%	\$0.00
3115	Shelter Rent - Federal Section 8	\$0.00	\$602.00	\$0.00	-100%	\$0.00
3190	Nondwelling Rentals	\$45,000.00	\$43,536.00	\$45,000.00	3.4%	\$14.42
3400	Administrative Fee - MRVP	\$0.00	\$0.00	\$0.00	0%	\$0.00
3610	Interest on Investments - Unrestricted	\$1,596.00	\$1,009.00	\$1,596.00	58.2%	\$0.51
3611	Interest on Investments - Restricted	\$0.00	\$0.00	\$0.00	0%	\$0.00
3690	Other Revenue	\$9,000.00	\$11,353.00	\$9,000.00	-20.7%	\$2.88
3691	Other Revenue - Retained	\$26,220.00	\$32,018.00	\$26,220.00	-18.1%	\$8.40
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)	\$253,401.00	\$215,838.00	\$220,521.00	2.2%	\$70.68
3802	Operating Subsidy - MRVP Landlords	\$0.00	\$0.00	\$0.00	0%	\$0.00
3803	Restricted Grants Received	\$0.00	\$0.00	\$0.00	0%	\$0.00
3920	Gain/Loss From Sale/Disp. of Prop.	\$0.00	\$0.00	\$0.00	0%	\$0.00
3000	TOTAL REVENUE	\$1,545,777.00	\$1,515,621.00	\$1,528,557.00	0.9%	\$489.92

Consolidated Budget (400-1) for all state-aided 667 (Elderly), 200 (family), and 705 (scattered site family) developments owned by North Attleborough Housing Authority.						
EXPENSES						
Account Number	Account Class	2021 Approved Expense Budget	2021 Actual Amounts Spent	2022 Approved Expense Budget	% Change from 2021 Actual to 2022 Budget.	2022 Dollars Budgeted per Unit per Month
4110	Administrative Salaries	\$173,493.00	\$165,918.00	\$199,976.00	20.5%	\$64.09
4120	Compensated Absences	\$0.00	\$5,200.00	\$0.00	-100%	\$0.00
4130	Legal	\$15,000.00	\$2,556.00	\$15,000.00	486.9%	\$4.81
4140	Members Compensation	\$2,031.00	\$322.00	\$2,050.00	536.6%	\$0.66
4150	Travel & Related Expenses	\$3,315.00	\$378.00	\$2,711.00	617.2%	\$0.87
4170	Accounting Services	\$12,862.00	\$13,062.00	\$13,234.00	1.3%	\$4.24
4171	Audit Costs	\$12,072.00	\$12,072.00	\$12,072.00	0%	\$3.87
4180	Penalties & Interest	\$0.00	\$0.00	\$0.00	0%	\$0.00
4190	Administrative Other	\$70,622.00	\$62,433.00	\$78,122.00	25.1%	\$25.04
4191	Tenant Organization	\$979.00	\$924.00	\$979.00	6%	\$0.31
4100	TOTAL ADMINISTRATION	\$290,374.00	\$262,865.00	\$324,144.00	23.3%	\$103.89
4310	Water	\$109,993.00	\$109,738.00	\$112,121.00	2.2%	\$35.94
4320	Electricity	\$242,724.00	\$216,057.00	\$218,515.00	1.1%	\$70.04
4330	Gas	\$35,804.00	\$36,952.00	\$38,068.00	3%	\$12.20
4340	Fuel	\$18,235.00	\$15,874.00	\$16,667.00	5%	\$5.34
4360	Net Meter Utility Debit/Energy Conservation	\$0.00	\$0.00	\$0.00	0%	\$0.00
4390	Other	\$0.00	\$0.00	\$0.00	0%	\$0.00
4391	Solar Operator Costs	\$0.00	\$0.00	\$0.00	0%	\$0.00
4392	Net Meter Utility Credit (Negative Amount)	\$0.00	\$0.00	\$0.00	0%	\$0.00
4300	TOTAL UTILITIES	\$406,756.00	\$378,621.00	\$385,371.00	1.8%	\$123.52

Consolidated Budget (400-1) for all state-aided 667 (Elderly), 200 (family), and 705 (scattered site family) developments owned by North Attleborough Housing Authority.						
EXPENSES						
Account Number	Account Class	2021 Approved Expense Budget	2021 Actual Amounts Spent	2022 Approved Expense Budget	% Change from 2021 Actual to 2022 Budget	2022 Dollars Budgeted per Unit per Month
4410	Maintenance Labor	\$289,897.00	\$265,475.00	\$294,746.00	11%	\$94.47
4420	Materials & Supplies	\$75,800.00	\$62,500.00	\$75,800.00	21.3%	\$24.29
4430	Contract Costs	\$93,225.00	\$90,061.00	\$93,225.00	3.5%	\$29.88
4400	TOTAL MAINTENANCE	\$458,922.00	\$418,036.00	\$463,771.00	10.9%	\$148.64
4510	Insurance	\$57,144.00	\$54,820.00	\$64,035.00	16.8%	\$20.52
4520	Payment in Lieu of Taxes	\$10,312.00	\$9,453.00	\$10,312.00	9.1%	\$3.31
4540	Employee Benefits	\$167,798.00	\$168,260.00	\$138,736.00	-17.5%	\$44.47
4541	Employee Benefits - GASB 45	\$0.00	\$-100,809.00	\$0.00	-100%	\$0.00
4542	Pension Expense - GASB 68	\$0.00	\$0.00	\$0.00	0%	\$0.00
4570	Collection Loss	\$0.00	\$2,832.00	\$0.00	-100%	\$0.00
4571	Collection Loss - Fraud/Retroactive	\$0.00	\$0.00	\$0.00	0%	\$0.00
4580	Interest Expense	\$0.00	\$0.00	\$0.00	0%	\$0.00
4590	Other General Expense	\$0.00	\$0.00	\$0.00	0%	\$0.00
4500	TOTAL GENERAL EXPENSES	\$235,254.00	\$134,556.00	\$213,083.00	58.4%	\$68.30
4610	Extraordinary Maintenance	\$127,702.00	\$116,375.00	\$38,200.00	-67.2%	\$12.24
4611	Equipment Purchases - Non Capitalized	\$7,100.00	\$6,911.00	\$15,600.00	125.7%	\$5.00
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	\$303,670.00	\$0.00	-100%	\$0.00
4600	TOTAL OTHER EXPENSES	\$134,802.00	\$426,956.00	\$53,800.00	-87.4%	\$17.24
4000	TOTAL EXPENSES	\$1,526,108.00	\$1,621,034.00	\$1,440,169.00	-11.2%	\$461.59

Consolidated Budget (400-1) for all state-aided 667 (Elderly), 200 (family), and 705 (scattered site family) developments owned by North Attleborough Housing Authority.						
SUMMARY						
Account Number	Account Class	2021 Approved Budget	2021 Actual Amounts	2022 Approved Budget	% Change from 2021 Actual to 2022 Budget	2022 Dollars Budgeted per Unit per Month
3000	TOTAL REVENUE	\$1,545,777.00	\$1,515,621.00	\$1,528,557.00	0.9%	\$489.92
4000	TOTAL EXPENSES	\$1,526,108.00	\$1,621,034.00	\$1,440,169.00	-11.2%	\$461.59
2700	NET INCOME (DEFICIT)	\$19,669.00	\$-105,413.00	\$88,388.00	-183.8%	\$28.33
7520	Replacements of Equip. - Capitalized	\$0.00	\$0.00	\$9,000.00	100%	\$2.88
7540	Betterments & Additions - Capitalized	\$0.00	\$0.00	\$17,000.00	100%	\$5.45
7500	TOTAL NONOPERATING EXPENDITURES	\$0.00	\$0.00	\$26,000.00	100%	\$8.33
7600	EXCESS REVENUE OVER EXPENSES	\$19,669.00	\$-105,413.00	\$62,388.00	-159.2%	\$20.00

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 \$50.00 per unit per month, as of July 1, 2020.

3610: Interest on Investments – Unrestricted: This account should be credited with interest earned on unrestricted administrative fund investments.

3611: Interest on Investments – Restricted: This account should be credited with interest earned on restricted administrative fund investments. For example, an LHA may receive a grant whose use is restricted to a specific purpose, and the interest income earned on that grant may also be restricted to the same purpose.

3690: Other Operating Revenues: This account should be credited with income from the operation of the project that cannot be otherwise classified. Income credits to this account include, but are not limited to, penalties for delinquent payments, rental of equipment, charges for use of community space, charges to other projects or programs for the use of central office management and maintenance space, commissions and profits from vending machines, including washing machines, and certain charges to residents for additional services, materials, and/or repairs of damage caused by neglect or abuse in accordance with the Department's regulations on lease provisions..

3691: Other Revenue – Retained: This account should be credited with certain miscellaneous revenue to be retained by the LHA, and which is not used to reduce the amount of operating subsidy the LHA is due. The most common examples for this account is receipts for the rental of roof antennas to cell phone providers and net meter credits earned on electricity bills from Net Meter Power Purchase Agreements (PPA's). Generally, surplus LHAs may retain 100% of these savings and deficit LHAs may retain 25% of the savings, with

the 75% balance used to offset its need for operating subsidy. However, for the period 7/1/16 through 6/30/20, all deficit LHAs may keep 100% of the net meter credit savings, while they can keep 50% effective 7/1/2020.

3692: Other Revenue - Operating Reserves: This account should be credited with funds that LHAs plan to utilize from their operating reserve accounts in excess of the Allowable Non-Utility Expense Level (ANUEL). To be approvable, LHA must maintain the DHCD prescribed operating reserve minimum level after deducting the amount budgeted. The only exception to this is when the expenses are for health and safety issues.

3693: Other Revenue – Net Meter: This account should normally be credited with 75% of the total net meter credit savings realized by a deficit LHA, while surplus LHAs with net meter credit savings would enter \$0 here. Savings are calculated as the value of the net meter credits appearing on the LHA’s electric bills (or, in some cases, paid in cash to the LHA by their utility company), minus the cost of the payments made to the solar power developer under their Power Purchase Agreement (PPA). Deficit LHAs normally may retain 25% of the savings. That amount should be included as Other Revenue – Retained on line #3691. However, please note that for the period 7/1/16 through 6/30/20 all LHAs may retain 100% of their total net meter credit savings, and should report those savings as Other Revenue – Retained on line #3691. LHAs can keep 50% of savings effective 7/1/2020.

3801: Operating Subsidy – DHCD (400-1): This account represents all state-funded operating subsidy to be received and or to be earned for the fiscal year. At the end of each fiscal year, this account will be adjusted in the operating statement to equal the actual subsidy earned by the LHA.

3802: Operating Subsidy – MRVP/AHVP Landlords:

The credit balance in this account represents the anticipated total receipts from DHCD during the fiscal year for housing assistance payments to landlords. At the end of each fiscal year this account will be adjusted to equal the actual subsidy earned.

3920: Gain/Loss from Sale or Disposition of Property (Capitalized or Non-Capitalized): The debit or credit balance of this account represents the following items: a) Cash proceeds from the sale of property that was either: 1) non-capitalized; or 2) capitalized and has been fully depreciated, and b) Realized gain or loss from the sale or disposition of capitalized property that has not been fully depreciated.

4110: Administrative Salaries: This account should be charged with the gross salaries of LHA personnel engaged in administrative duties and in the supervision, planning, and direction of maintenance activities and operating services during the operations period. It should include the salaries of the executive director, assistant executive director, accountants, accounting clerks, clerks, secretaries, project managers, management aides, purchasing agents, engineers, draftsmen, maintenance superintendents, and all other employees assigned to administrative duties.

4120: Compensated Absences: The debit balance in this account represents the actual cost incurred during the fiscal year for vacation, paid holidays, vested sick leave and earned compensatory time. This account includes both the direct compensated absences cost and associated employer payroll expenses (employment taxes, pension cost, etc.).

4130: Legal Expense: This account should be charged with retainers and fees paid to attorneys for legal services relating to the operation of the projects.

4140: Compensation to Authority Members: A local authority may compensate its members for performance of their duties and such other services as they may render to the authority in connection with its Chapter 200 development(s). Compensation for any other program is not authorized. Because of this, LHAs must base such compensation only on the actual rent receipts for these developments plus a prorated share of other operating receipts of funds on a per unit basis. The precise amount that members may be compensated is defined by statute to a maximum of \$40 per member per day, and \$50 for the chairperson per day. The total of all compensation to all board members is not to exceed two percent (2%) of actual gross income of Chapter 200 developments in any given year, consistent with the approved budget amount. In no case shall the payment of compensation exceed \$12,500 annually for the chairperson, or \$10,000 for any member other than the chairperson. Please note the statute requires the member to perform housing authority business in order to receive compensation.

4150: Travel and Related Expense: Legitimate travel expenses incurred by board members and staff in the discharge of their duties for any **state-aided program** are reimbursable from this account, as consistent with Department policy.

4170: Contractual Accounting Services: Fees for accounting services that are provided routinely and are contracted for on an annual basis. Only accounting services performed on a contractual basis (fee accountant) should be included in this item. Full or part-time LHA accounting staff that provides routine accounting services should be included in Account 4110, Administrative Salaries.

4171: Audit Costs: This account includes the state program's prorated share of audit fees paid to an Independent Public Accountant (IPA). The procurement of an IPA is necessary to satisfy the Federal Government's audit requirements. Costs for these services should be shared with all state and federal programs of LHA. **Audit costs are to be absorbed within the ANUEL.** The new Agreed Upon procedures (AUP) audit costs for state-assisted public housing programs should also be included in this account.

4180: Penalties and Interest: Any expenses incurred from penalties, fees, and interest paid on delinquent accounts shall be included in this line item.

4190: Administrative Other: This account is provided for recording the cost of administrative items for which no specific amount is prescribed in this 4100 group of accounts. It includes, but is not limited to, the cost of such items as: reports and accounting forms; stationery and other office supplies; postage; telephone services; messenger service; rental of office space; advertising for bids; publications; membership dues; collection agency & court costs, training costs; management fees, and fiscal agent fees.

4191: Tenant Organization: LTO Funding by the LHA. Upon request the LHA shall fund all LTOs in a city or town at the annual rate of \$6.00 per state-aided public housing unit occupied or available for occupancy by residents represented by such LTO(s) or an annual total of \$500.00 prorated among all such LTO(s), whichever is more. For more information on the creation and funding of LTOs see 760 CMR 6.09.

Authorities which operate computer learning centers, which are funded by the state consolidated budget or by other sources (which are typically recorded in line #3691 as "Other Revenue Retained", should budget the cost of the centers on this line.

4310: Water: This account should be charged with the cost of water and sewer charges purchased for all purposes.

4320: Electricity: This account should be charged with the total cost of electricity purchased for all purposes. Many LHAs have entered into Net Meter Credit Power Purchase Agreements (PPA's). In these deals, an LHA executes a contract with a solar power developer who constructs and owns an off- site solar electricity-generating site. In exchange for contracting to purchase a percentage of the solar power produced, the LHA receives a credit on its utility electric bill for each KWH purchased or in some cases receives a direct cash payment from their utility company. Please ensure that the amount charged to this account is the total cost of electricity BEFORE any reductions due to the receipt of net meter credits.

4330: Gas: This account should be charged with the cost of gas (natural, artificial, or liquefied) purchased for all purposes.

4340: Fuel: This account should be charged with the cost of coal, fuel oil, steam purchased, and any other fuels (except electricity and gas) used in connection with Local Housing Authority operation of plants for the heating of space or water supplied to tenants as a part of rent.

4360: Net Meter Utility Debit/Energy Conservation: This account is to be charged with costs incurred for energy conservation measures.

4390: Other Utilities: This account should be charged with the cost of utilities which are not provided for in accounts 4310 through 4360. In addition, for all quarterly or year-end operating statements 9/30/20 or later, and all budgets 6/30/21 or later, please use this line to record the total net meter credits earned as reported in Line 4392, MINUS the Solar Operator Costs reported in Line 4391, with the result expressed as a positive number. For example, if you reported -\$20,000 in Net Meter Utility Credits in Line 4392 and \$15,000 in Solar Operator Costs in Line 4391, you would subtract the \$15,000 reported on Line 4391 from the -\$20,000 reported on Line 4392, and post the remainder of \$5,000 on Line 4360, as a positive number. This number essentially represents the "net" savings the LHA earned from its net meter credit contract.

4391: Solar Operator Costs: Many LHAs have entered into Net Meter Credit Power Purchase Agreements (PPA's). In these deals, an LHA executes a contract with a solar power developer who constructs and owns an off-site solar electricity-generating site. The LHA makes regular (usually monthly) payments to the developer for its contracted share of the solar electricity produced by the site. Those payments should be entered in this account.

4392: Net Meter Utility Credit (Negative Amount): As noted in account #4391 above, many LHAs have executed Net Meter Credit Power Purchase Agreements (PPA's). In exchange for contracting to purchase a percentage of the solar power produced, the LHA receives a credit on its utility electric bill for each KWH purchased from the developer, which reduces the balance on its electric bill, or, in some cases, the credits are paid in cash to the LHA by the utility company. The total gross amount of the net meter credits that appear on the LHA's utility bills should be carried in this account and entered as a negative number. In cases where credits are paid in cash to the Host LHA, the net balance after paying out the amounts due the participating housing authorities, should also be carried in this account and entered as a negative number.

4410: Maintenance Labor: This account should be charged with the gross salaries and wages, or applicable portions thereof, for LHA personnel engaged in the routine maintenance of the project.

4420: Materials & Supplies: This account should be charged with the cost of materials, supplies, and expendable equipment used in connection with the routine maintenance of the project. This includes the operation and maintenance of automotive and other movable equipment, and the cost of materials, supplies, and expendable equipment used in connection with operating services such as janitorial services, elevator services, extermination of rodents and household pests, and rubbish and garbage collection.

4430: Contract Costs: This account should be charged with contract costs (i.e. the cost of services for labor, materials, and supplies furnished by a firm or by persons other than Local Authority employees) incurred in connection with the routine maintenance of the project, including the maintenance of automotive and other movable equipment. This account should also be charged with contract costs incurred in connection with such operating services as janitorial services, fire alarm and elevator service, extermination of rodents and household pests, rubbish and garbage collection, snow removal, landscape services, oil burner maintenance, etc.

4510: Insurance: Includes the total amount of premiums charged all forms of insurance. Fire and extended coverage, crime, and general liability are handled by DHCD on a statewide basis. All other necessary insurance policies include: Workers' Compensation, boiler, vehicle liability and owner, etc.

4520: Payments in Lieu of Taxes:

This account should be charged with all payments in lieu of taxes accruing to a municipality or other local taxing body.

4540: Employee Benefits: This account should be charged with local housing authority contributions to employee benefit plans such as pension, retirement, and health and welfare plans. It should also be charged with administrative expenses paid to the State or other public agencies in connection with a retirement plan, if such payment is required by State Law, and with Trustee's fees paid in connection with a private retirement plan, if such payment is required under the retirement plan contract.

Employee benefits are based upon a given percentage of the total payroll; therefore, the total amount approved in this account will be based on the approved budgeted salaries representing the state's fair share.

4541: Employee Benefits - GASB 45: This line covers "Other Post-Employment Benefits" (OPEB). Of the total benefits offered by employers to attract and retain qualified employees, some benefits, including salaries and active-employee healthcare are taken while the employees are in active service, whereas other benefits, including post-employment healthcare and other OPEB are taken after the employees' services have ended. Nevertheless, both types of benefits constitute compensation for employee services. In accordance with required accounting practices, this amount is not projected in the budget (and is therefore blank) but the estimated future costs of this item is carried in the operating statement.

4542: Pension Expense – GASB 68: The primary objective of GASB 68 Statement is to improve accounting and financial reporting for pension costs. It also improves information provided by state and local governmental employers about financial support for pensions that is provided by other entities. As with account 4541 above, in accordance with required accounting practices, this amount is not projected in the budget (and is therefore blank) but the estimated future costs of this item is carried in the operating statement.

4570: Collection Loss: The balance in this account represents the estimated expense to cover unexpected losses for tenant rents. Note: Do not include losses from fraud/retroactive balances here. Report them in Account 4571 – Collection Loss – Fraud/Retroactive.

4571: Collection Loss – Fraud/Retroactive: The balance in this account represents the estimated expense to cover unexpected losses for tenant rents due to unreported income, i.e. fraud/retroactive balances.

4580: Interest Expense: The debit balance in this account represents the interest expense paid and accrued on loans and notes payable. This debt can be from operating borrowings or capital borrowings.

4590: Other General Expense: This account represents the cost of all items of general expenses for which no specific account is prescribed in the general group of accounts.

4610: Extraordinary Maintenance – Non-Capitalized: This account should be debited with all *costs* (labor, materials and supplies, expendable equipment (such as many tools or routine repair parts), and contract work) of repairs, replacements (but not replacements of non-expendable equipment), and rehabilitation of such a substantial nature that the work is clearly not a part of the routine maintenance and operating program. The items charged to this account should not increase the useful life or value of the asset being repaired. These items are not capitalized and are not added as an increase to fixed assets at the time of completion. Nor are these items depreciated. An example of this would be scheduled repainting of apartments.

4611: Equipment Purchases – Non-Capitalized: This account should be debited with the costs of equipment that does not meet the LHA’s criteria for capitalization. Because these items are being expended when paid, they should not be categorized as a fixed asset and therefore will not be depreciated. These items include stoves, refrigerators, small tools, most computers and software, etc.

The budget is a planning tool and as our portfolio ages it is essential that LHAs evaluate their properties annually and plan for extraordinary maintenance. To that end DHCD very strongly recommends that for all 400-1 operating budgets, depending on the age of the portfolio and condition, LHAs spend between \$100 and \$500 a year per unit in Extraordinary Maintenance, Equipment Purchases, Replacement of Equipment, and Betterments & Additions to ensure that the aging public housing stock is preserved.

4715: Housing Assistance Payments: This account should be debited with all housing assistance payments paid to landlords for the MRVP program on a monthly basis.

4801: Depreciation Expense: This account should be debited with annual fixed asset depreciation expenses as determined by the LHA’s capitalization policy.

7520: Replacement of Equipment – Capitalized: This account should be debited with the acquisition cost (only the net cash amount) of non-expendable equipment purchased as a replacement of equipment of substantially the same kind. These items, such as vehicles, computers, or furniture, meet the LHA’s criteria for capitalization and will also be added to fixed assets and therefore depreciated over the useful life.

7540: Betterments & Additions – Capitalized: This account should be debited with the acquisition cost (only the net cash amount) of non-expendable equipment and major non-routine repairs that are classified as a betterment or addition. These items meet the LHA’s criteria for capitalization and will also be added to fixed

assets and therefore depreciated over the useful life of the asset. Examples are: major roof replacement, structural repairs such as siding, or major paving work.

In accordance with GAAP accounting, inventory purchases (Replacement of Equipment and Betterments & Additions) are distinguished between capitalized and non-capitalized items. Any inventory or equipment purchase greater than \$5,000 is required by DHCD to be capitalized, inventoried and depreciated. Any inventory or equipment purchase costing \$1,000 to \$4,999 should be inventoried by LHA staff for control purposes only but is not subject to capitalization or depreciation, it is, however, required to be expensed when the items are paid for. An LHA's inventory listing should include both capitalized and non-capitalized items of \$1,000 and more, as well as all refrigerators and stoves of any value. All items that appear on the inventory listing should be tagged with a unique identification number, and all refrigerators and stoves (regardless of value) should be tagged. LHAs may adopt a capitalization policy that capitalizes inventory purchases at a lesser amount than the \$5,000 requirement (i.e. \$1,000 - \$4,999); however, no capitalization policy can have an amount higher than \$5,000. Any inventory or equipment purchases costing \$0 to \$999 are to be expensed when paid for.

Narrative Responses to the Performance Management Review (PMR) Findings

PMRs are conducted for most LHAs on a biennial basis. This year there is no PMR record for this Housing Authority.

Explanation of PMR Criteria Ratings

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

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

CRITERION	DESCRIPTION
Health & Safety	
Health & safety violations	DHCD has observed conditions at the LHA's developments and reported health and safety violations. The LHA has certified the number of corrected violations in each category.
Facility Management - Inspections	
Unit Inspections Conducted	<p>Housing authorities are required to conduct inspections of all their occupied units at least once a year</p> <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	<p>Housing authorities are required to note all of the deficiencies found during inspections</p> <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	<p>Housing authorities are required to generate work orders for all deficiencies noted during inspections</p> <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	<p>Work order system identifies, tracks, and can produce reports for inspection work orders.</p> <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	<p>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).</p> <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 North Attleborough Housing Authority:

Policy	Last Ratified by Board Vote	Notes
*Rent Collection Policy	01/22/2019	Revised following PMR recommendations
*Personnel Policy	04/11/2019	Added Emergency closing (snow days)
*Capitalization Policy	03/11/2021	Board made no changes
*Procurement Policy	05/18/2017	Updated with AG and MCPPO 2017
*Grievance Policy	01/17/2017	
Reasonable Accommodations Policy	05/19/2021	Amended to add parking space
Smoking Policy	05/14/2015	
Parking	05/19/2021	Amended to specify R/A per HUD

* 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

North Attleborough 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
Biennial recertification of c.667 rents	efficiency No Expiration	04/27/2015	

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.

- Combined LTO letters
- Combined LTO Letter
- Public Comments
- Cover sheet for tenant satisfaction surveys
- Tenant Satisfaction Survey 667 Program

Department of Housing & Community Development
Submitted to: Intelligrants Annual Plan website on February 23, 2022.

Please be advised, that NAHA presented the FY 2023 proposed budget for Capital Improvement Project as well as the new DHCD Annual Plan for FY 2023 at three tenant meetings in person on March 3, 2022. Two Zoom meetings were also held on March 2, 2022 for family tenant access. Invitations were sent to ALL tenants in 272 housing units by mail or hand delivery on February 17, 2022.

The Capital Improvement Plan And DHCD Annual Plan were listed in public meeting for the Board and for public discussion on February 17, 2022. Both were posted on the NAHA website February 23, 2022. Printed copies were placed in each Laundry room, the NAHA Office lobby, and sent to each Commissioner on February 23, 2022.

The two will be presented for NAHA Board approval in a public meeting on April 14, 2022.

Dan Ouellette, E.D.

I, Dan Davis, was the last duly elected President of the **Circle Court Tenant Organization (CCTO)**. I hereby witness the Circle Court Tenant support for NAHA's proposed Capital Improvement Plan Budget, as presented at Circle Court tenant meeting on March 3, 2022, in person, to be presented at the NAHA Board meeting on April 14, 2022, in public meeting.

My signature below is to verify Circle Court Tenant review and support for

- a. NAHA's proposed CIP Budget and
- b. DHCD Annual Plan,

Please feel free to contact me if I can offer any further insight on the project at our development.

Sincerely,

Dan Davis, Past CCTO Pres.

63-4 Circle Court

North Attleborough, MA 02760

3/3/2022
date

I, Harriet Warsofsky, am the duly elected President of the **South Washington Tenant Organization (SWTO)**. I hereby witness the South Washington Tenant support for NAHA's proposed Capital Improvement Plan Budget, as presented at South Washington tenant meeting on March 3, 2022, in person; to be presented at the NAHA Board meeting on April 14, 2022, in public meeting.

My signature below is to verify South Washington Tenant Organization's (SWTO) review and support for

- a. NAHA's proposed CIP Budget and
- b. DHCD Annual Plan,

Please feel free to contact me if I can offer any further insight on the project at our development.

Sincerely,

Harriet Warsofsky, SWTO President

22 South Washington Street # 306

North Attleborough, MA 02760

3/3/2022
date

Department of Housing & Community Development
Submitted to: Intelligrants Annual Plan website on February 23, 2022.

Please be advised, that NAHA presented the FY 2023 proposed budget for Capital Improvement Project as well as the new DHCD Annual Plan for FY 2023 at three tenant meetings in person on March 3, 2022. Two Zoom meetings were also held on March 2, 2022 for family tenant access. Invitations were sent to ALL tenants in 272 housing units by mail or hand delivery on February 17, 2022.

The Capital Improvement Plan And DHCD Annual Plan were listed in public meeting for the Board and for public discussion on February 17, 2022. Both were posted on the NAHA website February 23, 2022. Printed copies were placed in each Laundry room, the NAHA Office lobby, and sent to each Commissioner on February 23, 2022.

The two will be presented for NAHA Board approval in a public meeting on April 14, 2022.

Dan Ouellette, E.D.

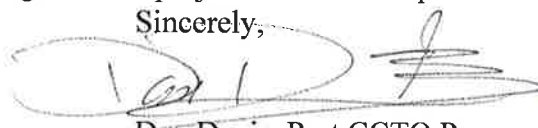
I, Dan Davis, was the last duly elected President of the **Circle Court Tenant Organization (CCTO)**. I hereby witness the Circle Court Tenant support for NAHA's proposed Capital Improvement Plan Budget, as presented at Circle Court tenant meeting on March 3, 2022, in person, to be presented at the NAHA Board meeting on April 14, 2022, in public meeting.

My signature below is to verify Circle Court Tenant review and support for

- a. NAHA's proposed CIP Budget and
- b. DHCD Annual Plan,

Please feel free to contact me if I can offer any further insight on the project at our development.

Sincerely,


Dan Davis, Past CCTO Pres.

63-4 Circle Court

North Attleborough, MA 02760

3/3/2022
date

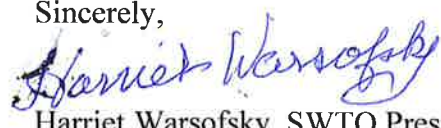
I, Harriet Warsofsky, am the duly elected President of the **South Washington Tenant Organization (SWTO)**. I hereby witness the South Washington Tenant support for NAHA's proposed Capital Improvement Plan Budget, as presented at South Washington tenant meeting on March 3, 2022, in person; to be presented at the NAHA Board meeting on April 14, 2022, in public meeting.

My signature below is to verify South Washington Tenant Organization's (SWTO) review and support for

- a. NAHA's proposed CIP Budget and
- b. DHCD Annual Plan,

Please feel free to contact me if I can offer any further insight on the project at our development.

Sincerely,


Harriet Warsofsky, SWTO President

22 South Washington Street # 306

North Attleborough, MA 02760

3/3/2022
date

**North Attleboro Housing Authority
Annual Plan Hearing – Public Comments**

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

Dan Ouellette
Executive Director

Resident Surveys – Background

Since 2016 DHCD has been working with the Center for Survey Research (CSR) at the University of Massachusetts Boston to survey residents in the state public housing units it oversees. The surveys are confidential, mailed directly to the residents and returned to the Center by mail (or, starting in 2019, completed on-line). CSR surveys residents of elderly/disabled units (also known as c. 667 developments) and family units (also known as c. 705 and c. 200 developments).

During each round, all individual residents are mailed surveys, with one exception: in the case of the twelve housing authorities with more than 225 c. 200 family units, a randomly selected group of 225 residents was surveyed at each housing authority. This group was determined to be large enough to generate statistically useful results. In both rounds, responses from c.200 and c.705 residents are always combined.

Round One Surveys (2016 – 2018)

In Round One of the surveys, CSR surveyed residents of elderly/disabled developments (c. 667) in three groups in the Fall of 2016, 2017 and 2018. CSR surveyed residents of family units (c. 705 and c. 200 developments) in the Spring of 2016. (Note: there are many more c. 667 units, so they were broken down into three groups).

Notes: Round One Surveys

1. In previous publications of this survey data, if there were at least twenty responses from residents of an authority's c.667 units or from their c.200/705 units, then there is a separate report for that program.
2. However, to be consistent with the new Round Two methodology described below, we recalculated the Round One data using the new methodology. Since we no longer combine c.667 results with c.200/705 results, several LHAs no longer have a report for their c.200/705 units, given the small data set for those units.

Round Two Surveys (2019 – 2022)

Round Two of the surveys began in 2019. CSR surveyed about one-third of the elderly/disabled residents in Fall 2019 and all of the family residents in Fall 2020. We expect the remaining elderly/disabled residents to be surveyed in Fall 2021 and Fall 2022.

Notes: Round Two Surveys

1. We refined our reporting methodology and will issue survey results for any program (c. 667 or c. 200/705) meeting these requirements:
 - 8-19 completed surveys received, if the response rate is at least 40%
 - 20-29 completed surveys received, if the response rate is at least 20%
 - 30+ completed surveys received, if the response rate is at least 15%
2. Responses from the family units will not be combined with responses from elderly/disabled units as they originally were in Round One. Since the variance between the results of the elderly/disabled and family programs was sometimes significant, combining the two was determined to yield less accurate results.

NORTH ATTLEBOROUGH HOUSING AUTHORITY

Chapter 667 Housing Summary 2016 - 2018

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

Fall 2016:

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

Fall 2017:

- Surveys were sent to 6024 housing units (Chapter 667). 3391 surveys were filled out and returned.
- In the **North Attleborough Housing Authority**, surveys were sent to a total of **225** housing units (Chapter 667); **121** surveys were completed.

Fall 2018:

- Surveys were sent to 13,304 housing units (Chapter 667). 6717 surveys were filled out and returned.

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

Communication

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

	North Attleborough Housing Authority	Medium LHAs in Southeastern MA *	Entire State
Contacted management about a problem or concern.....	76%	80%	78%
Felt they were usually or always treated with courtesy and respect when they contacted management.....	85%	86%	87%
Saw the Capital Improvement Plan.....	34%	30%	30%
Saw the Operating Budget.....	17%	15%	17%
Knew the Executive Director held a meeting with residents...	90%	52%	53%

* Medium LHAs in Southeastern Massachusetts include: Attleboro, Barnstable, Fairhaven, Fall River, North Attleborough, and Plymouth.

Services and Programs

57% of the North Attleborough 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:

	North Attleborough Housing Authority	Medium LHAs in Southeastern MA	Entire State
Job training programs.....	7%	7%	6%
Money management programs (<i>budgeting, taxes, income building</i>).....	11%	9%	10%
Children’s programs (<i>tutoring, childcare, afterschool programs</i>).....	3%	2%	2%
Health and Medical Services (<i>visiting nurse, meal programs</i>).....	39%	36%	35%
Adult Education (<i>GED, ESL, educational counseling</i>)	9%	8%	10%

Maintenance and Repair

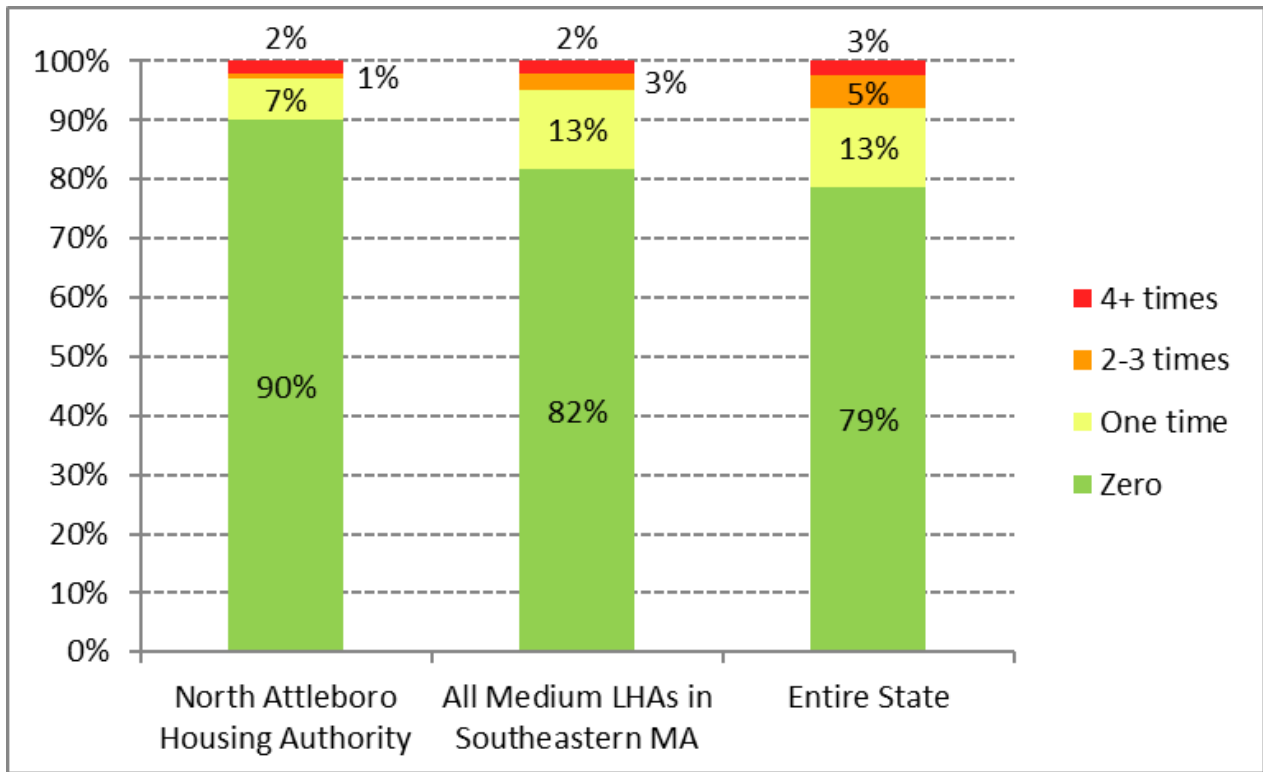
Who had problems? About one-tenth of respondents had a problem with their heating and about one-half had a plumbing problem in the last 12 months.

	North Attleborough Housing Authority	Medium LHAs in Southeastern MA	Entire State
Had a heating problem.....	11%	19%	21%
Had a problem with water or plumbing.....	50%	49%	49%

- **Heating Problems**

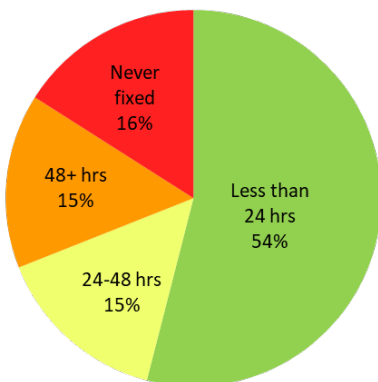
How many times did residents have heating problems?

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

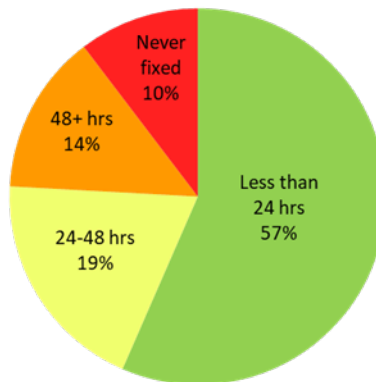


How long did it take to fix the heating problems? For those respondents who had problems, we asked how long it usually took for the problems to be fixed – less than 24 hours, 24 - 48 hours, more than 48 hours, or never fixed.

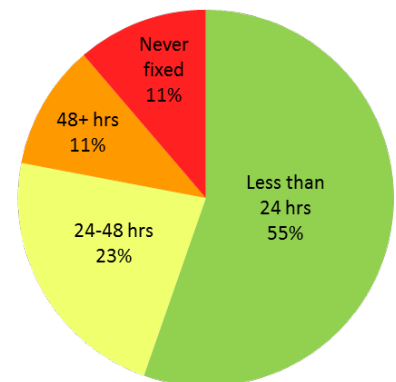
North Attleborough Housing Authority



Medium LHAs in Southeastern MA



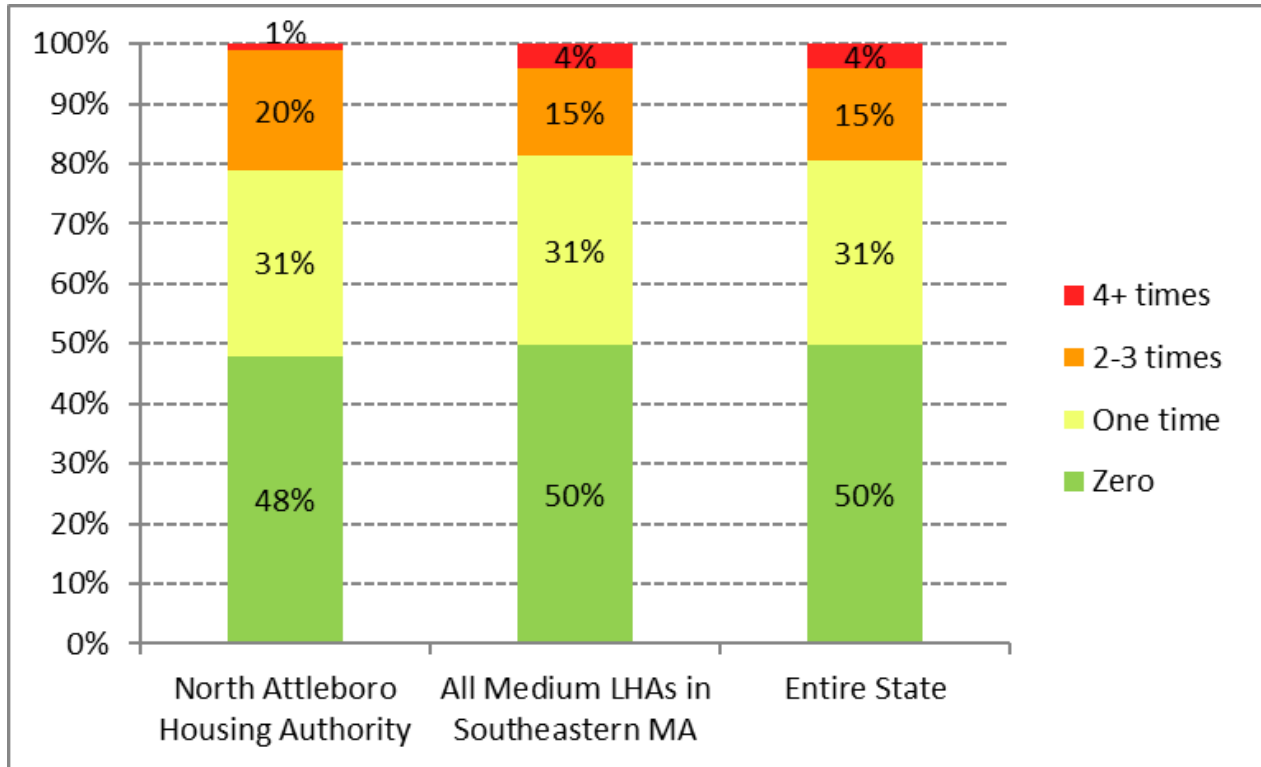
Entire State



- **Water or Plumbing Problems**

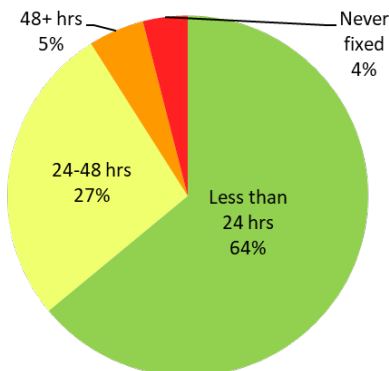
How many times did residents have problems with their water or plumbing?

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

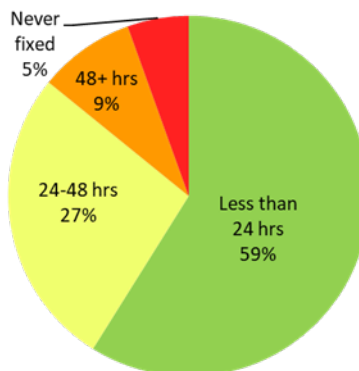


How long did it take to fix the water or plumbing problems? For those respondents who had problems, we asked how long it usually took for the problems to be fixed – less than 24 hours, 24 - 48 hours, more than 48 hours, or never fixed.

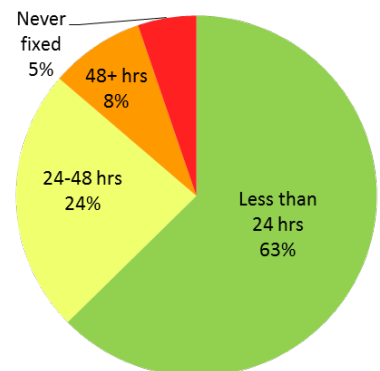
North Attleborough Housing Authority



Medium LHAs in Southeastern MA

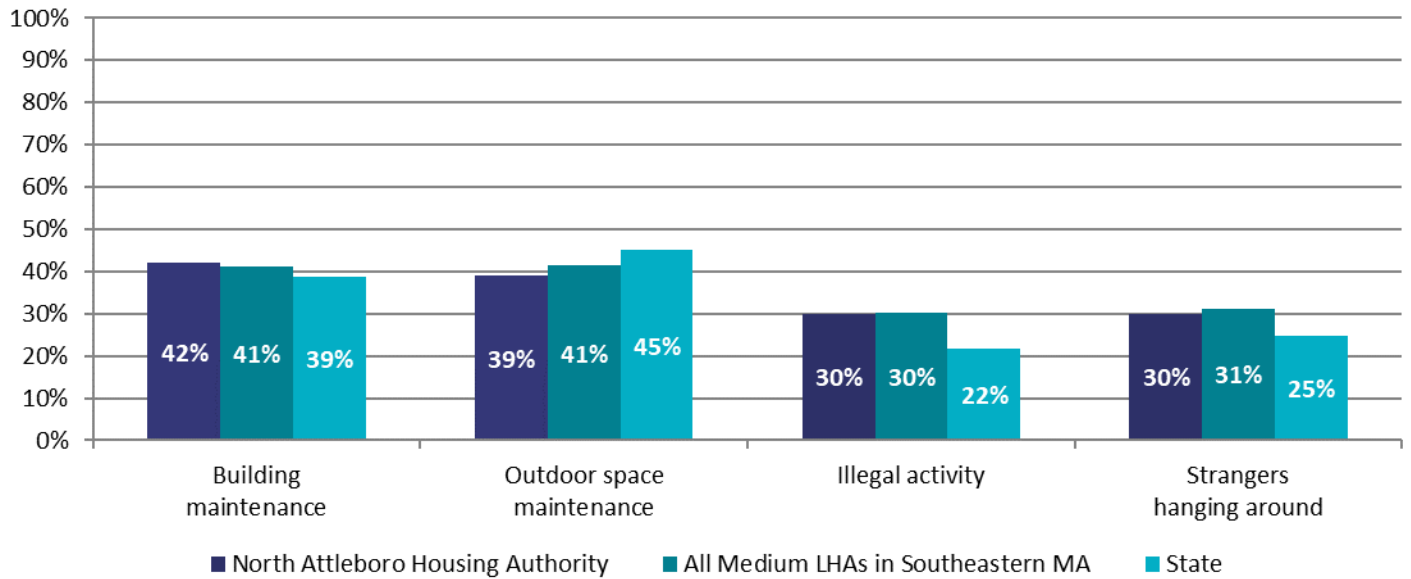


Entire State



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

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



Safety

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

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

