

## Notice of Public Hearing

### The Littleton Housing Authority invites all tenants and the general public to a review of the Authority's Proposed Annual Plan for Fiscal Year 2024

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

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

Hearing time and date: **5:00 PM on 01/04/2023**

Hearing location: Littleton HA Annual Plan Hearing  
19 Shattuck Street - Littleton, MA  
See Special Instructions Below

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

- o Copies of the Annual Plan are available at the Authority's office or may be reviewed online at <https://tinyurl.com/LHA-MA-AnnualPlan>
- o Comments may be submitted orally at the hearing, by emailing the housing authority office, or by submitting written comments at the housing authority office. Comments must be received no later than the close of the public hearing.
- o For reasonable accommodation requests contact the housing authority office by 12/21/2022 at 5:00 PM.
- o Contact information for Littleton Housing Authority:  
Office: 19 Shattuck St., Littleton, MA 01460  
Phone: (978) 486-8833  
Email: Littletonh@aol.com

**Detailed Instructions for Remote Access**

Littleton Housing Authority

Annual Plan Hearing - Board Meeting

January 4th, 2023 at 5:00 PM

19 Shattuck Street - Littleton, MA

In Our Community Room

To View Our Annual Plan

Please Click or Enter the link below:

<https://tinyurl.com/LHA-MA-AnnualPlan>

## Aviso de audiencia pública

### El/La Littleton Housing Authority invita a todos los arrendatarios y al público en general a una revisión del Plan Anual Propuesto por la autoridad para el año fiscal 2024

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

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

Fecha y hora de la audiencia: **5:00 PM** del **01/04/2023**

Lugar de la audiencia: Littleton HA Annual Plan Hearing  
19 Shattuck Street - Littleton, MA  
See Special Instructions Below

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

- o Puede obtener copias del Plan anual en la oficina de la autoridad o consultar el Plan por Internet en <https://tinyurl.com/LHA-MA-AnnualPlan>. El Plan está disponible únicamente en inglés.
- o Si desea hacer comentarios, puede hacerlo oralmente en la audiencia o enviar los comentarios por correo electrónico o postal a la oficina de la autoridad de vivienda. Los comentarios se deben recibir antes del cierre de la audiencia pública.
- o Si tiene una solicitud razonable en relación con una discapacidad, póngase en contacto con la oficina de la autoridad de vivienda antes del 12/21/2022 a las 5:00 PM.
- o Información de contacto de Littleton Housing Authority:  
Oficina: 19 Shattuck St., Littleton, MA 01460  
Teléfono: (978) 486-8833  
Correo electrónico: Littletonh@aol.com

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សេចក្តីជូនដំណឹងអំពីសវនកម្មសាធារណៈ

**Littleton Housing Authority អញ្ជើញអ្នកជួល  
និងសាធារណជនទូទៅទាំងអស់ឲ្យមើលឡើងវិញនូវផែនការ  
ប្រចាំឆ្នាំដែលបានដាក់ស្នើរបស់អាជ្ញាធរសម្រាប់ឆ្នាំសារពើពន្ធ  
2024**

ផែនការប្រចាំឆ្នាំមានគោលបំណងផ្តល់ការយល់ដឹងអំពីបុរេបតិបត្តិការ និងផែនការរបស់អាជ្ញាធរសម្រាប់ឆ្នាំសារពើពន្ធដាច់ខាតមុនៗ ព្រោះរ៉ាប់រងរាល់ឆ្នាំនៃឆ្នាំសាធារណៈដែលជួយដោយរបៀបរបបអាជ្ញាធរ។ ផែនការប្រចាំឆ្នាំដែលបានដាក់ស្នើ មានធាតុដូចខាងក្រោម៖

1. ផែនការកែលម្អអនុបត្តិការដែលបានដាក់ស្នើ (5 ឆ្នាំ)
2. ផែនការជួសជុល និងថែទាំដែលបានដាក់ស្នើ
3. ថវិកាបុរេបតិបត្តិការបច្ចុប្បន្ន
4. ការផ្តល់យោបល់ពីលទ្ធផលនៃការពិនិត្យមើលឡើងវិញនូវការគ្រប់គ្រងការបំពេញការងារ (PMR)
5. បញ្ជីគោលនយោបាយអាជ្ញាធរលំនៅដ្ឋាន
6. បញ្ជីការលះបង់សិទ្ធិពីបទប្បញ្ញត្តិគ្រប់គ្រងរបស់ក្រសួងអភិវឌ្ឍន៍សហគមន៍ និងលំនៅដ្ឋាន (DHCD)
7. ធាតុផ្សេងៗទៀត

កាលបរិច្ឆេទ និងម៉ោងសវនកម្ម៖ **5:00 PM នៅ 01/04/2023**

ទីកន្លែងសវនកម្ម៖ Littleton HA Annual Plan Hearing  
19 Shattuck Street - Littleton, MA  
See Special Instructions Below

**គេហទំព័រ**

និងសាធារណជនទូទៅគួរឲ្យមានអញ្ជើញឱ្យពិនិត្យមើលឡើងវិញនូវផែនការប្រចាំឆ្នាំមុនពេលបើកសវនាការ ហើយអាចបញ្ចូលមតិសាធារណៈដូចមានកត់សម្គាល់ខាងក្រោម។

អាជ្ញាធរគួរតែគ្រប់គ្រងរាល់ឆ្នាំរបស់អង្គការរបស់អ្នកជួលក្នុងមូលដ្ឋាន (LTO) ឬក្រុមប្រឹក្សាសាលាបង់គេហដ្ឋាន (RAB) អំពីតម្រូវការ និងអាទិភាពនានា ហើយបញ្ចូលតម្រូវការ និងអាទិភាពទាំងនោះមួយចំនួន ឬទាំងអស់ទៅក្នុងសេចក្តីព្យាបាលផែនការ បើអាជ្ញាធរយល់ថាសមស្របជាមួយការគ្រប់គ្រងដែលត្រូវបានគ្រប់គ្រង។ មតិសំខាន់ៗនឹងត្រូវបានសង្ខេប និងបញ្ចូលទៅក្នុងផែនការប្រចាំឆ្នាំ នៅពេលវាត្រូវបានដាក់ជូនក្រសួងអភិវឌ្ឍន៍សហគមន៍ និងលំនៅដ្ឋាន (DHCD)។

- សេចក្តីជូនដំណឹងនៃផែនការប្រចាំឆ្នាំ មាននៅកម្រិតយល់របស់អាជ្ញាធរ ឬអាចពិនិត្យមើលឡើងវិញលើបណ្តាញតាមរយៈ <https://tinyurl.com/LHA-MA-AnnualPlan>។ មានជាភាសាអង់គ្លេសស្របចំណុះ។
- មតិសាធារណៈគួរតែផ្តល់ដោយផ្ទាល់មាត់នៅក្នុងសវនាការ ដោយផ្ទៀងផ្ទាត់នូវការយល់ដឹងរបស់អាជ្ញាធរលំនៅដ្ឋាន ឬដោយដាក់មតិជាលាយលក្ខណ៍អក្សរនៅកម្រិតយល់របស់អាជ្ញាធរលំនៅដ្ឋាន។ មតិសាធារណៈត្រូវតែផ្តល់ឱ្យបានមុនពេលបើកសវនាការសាធារណៈ។
- សម្រាប់សំណើសុំការស្នាក់នៅសមរម្យ សូមទាក់ទងការិយាល័យអាជ្ញាធរលំនៅដ្ឋានក្រីមថ្មី 12/21/2022 នៅម៉ោង 5:00 PM។
- ព័ត៌មានទំនាក់ទំនងសម្រាប់ Littleton Housing Authority៖
  - ការិយាល័យ៖ 19 Shattuck St., Littleton, MA 01460
  - ទូរស័ព្ទ៖ (978) 486-8833
  - អ៊ីមែល៖ Littletonh@aol.com

**Detailed Instructions for Remote Access**

Littleton Housing Authority

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January 4th, 2023 at 5:00 PM

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## Thông báo Điều trần Công khai

### Littleton Housing Authority

xin mời tất cả những người thuê nhà và cộng đồng đến tham dự buổi đánh giá Kế hoạch Hàng năm Đề xuất cho Năm Tài chính của Cơ quan Quản lý 2024

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

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

Ngày và giờ điều trần: **5:00 PM và 01/04/2023**

Địa điểm điều trần: Littleton HA Annual Plan Hearing  
19 Shattuck Street - Littleton, MA  
See Special Instructions Below

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

- o Các bản sao của Kế hoạch Hàng năm sẵn có tại văn phòng Cơ quan Quản lý hoặc quý vị có thể xem trực tuyến tại <https://tinyurl.com/LHA-MA-AnnualPlan>. Các bản này chỉ có bằng Tiếng Anh.
- o Các ý kiến đóng góp có thể được nộp bằng lời tại buổi điều trần, gửi email cho văn phòng cơ quan quản lý gia cư, hoặc nộp ý kiến bằng văn bản tại văn phòng cơ quan quản lý gia cư. Các ý kiến đóng góp phải được nhận không muộn hơn giờ kết thúc phiên điều trần.
- o Để đưa ra các yêu cầu về biện pháp điều chỉnh đặc biệt hợp lý, hãy liên hệ với văn phòng cơ quan quản lý gia cư trước 12/21/2022 lúc 5:00 PM.
- o Thông tin liên hệ cho Littleton Housing Authority:  
Văn phòng: 19 Shattuck St., Littleton, MA 01460  
Điện thoại: (978) 486-8833  
Email: Littletonh@aol.com

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# 开公众听证会的通知

## Littleton Housing Authority 邀请所有租户和公众 对本管理局的 2024 财政年度建议的《年度计划》进行审查

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

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

听证会时间和日期: **5:00 PM 在 01/04/2023**

听证会地点: Littleton HA Annual Plan Hearing

19 Shattuck Street - Littleton, MA

See Special Instructions Below

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

- 可以在管理局的办公室获得《年度计划》的副本，或者可以上网进入 <https://tinyurl.com/LHA-MA-AnnualPlan> 在线查看。那些副本或网上内容是用英语的。
- 各位要提出评论，可以在听证会上通过口头方式、或通过向住房管理局的办公室发送电子邮件、或在住房管理局的办公室当面提交书面评论。所有评论必须在公众听证会结束之前收到。
- 对于合理的需通融的要求，请在 12/21/2022 之前通过 5:00 PM 与住房管理局的办公室联系。
- Littleton Housing Authority 的联系方式：  
办公室: 19 Shattuck St., Littleton, MA 01460  
电话: (978) 486-8833  
电子邮件: Littletonh@aol.com

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## Aviso de Audiência Pública

### O Littleton Housing Authority convida todos os locatários e o público em geral para uma revisão do plano anual proposto pela Autoridade para o ano fiscal 2024

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

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

Data e hora da audiência: **5:00 PM em 01/04/2023**

Local da audiência: Littleton HA Annual Plan Hearing  
19 Shattuck Street - Littleton, MA  
See Special Instructions Below

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

- Cópias do Plano Anual estão disponíveis no escritório da Autoridade ou podem ser analisadas on-line em <https://tinyurl.com/LHA-MA-AnnualPlan>. Estas estão apenas no idioma inglês.
- Os comentários podem ser apresentados oralmente na audiência, por e-mail para o escritório da autoridade habitacional ou por escrito para o escritório da autoridade habitacional. Os comentários devem ser recebidos, no máximo, até o encerramento da audiência pública.
- Para solicitações razoáveis de acomodação, entre em contato com o escritório da autoridade habitacional em 12/21/2022 às 5:00 PM.
- Informações de contato para Littleton Housing Authority:  
Escritório: 19 Shattuck St., Littleton, MA 01460  
Telefone: (978) 486-8833  
E-mail: Littletonh@aol.com

**Detailed Instructions for Remote Access**

Littleton Housing Authority  
Annual Plan Hearing - Board Meeting  
January 4th, 2023 at 5:00 PM  
19 Shattuck Street - Littleton, MA  
In Our Community Room  
To View Our Annual Plan  
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## Уведомление о публичном слушании

### Littleton Housing Authority приглашает всех жильцов и представителей общественности принять участие в рассмотрении предлагаемого Жилищным управлением Годового плана на фискальный год 2024

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

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

Время слушания: **5:00 PM** Дата слушания **01/04/2023**

Место проведения слушания: Littleton HA Annual Plan Hearing  
19 Shattuck Street - Littleton, MA  
See Special Instructions Below

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

- o Копии Годового плана можно получить в офисе Жилищного управления или на сайте: <https://tinyurl.com/LHA-MA-AnnualPlan>. Документы доступны только на английском языке.
- o Замечания можно сделать устно в ходе слушания, а также отправить их по электронной почте в офис Жилищного управления или оставив их в письменном виде в офисе Жилищного управления. Замечания должны быть получены до закрытия публичного слушания.
- o Разумные запросы о размещении можно направить в офис Жилищного управления до 12/21/2022 5:00 PM.
- o Контактная информация Littleton Housing Authority:
  - Офис: 19 Shattuck St., Littleton, MA 01460
  - Телефон: (978) 486-8833
  - Адрес эл. почты: Littletonh@aol.com

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## Avi Odisyon Piblik

### The Littleton Housing Authority

## ap envite tout lokatè ak piblik la an jeneral nan yon revizyon Plan Anyèl pou Ane Fiskal la ke Administrasyon an Pwopoze 2024

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

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

Dat ak lè odisyon: **5:00 PM** nan dat **01/04/2023**

Adrès odisyon an: Littleton HA Annual Plan Hearing  
19 Shattuck Street - Littleton, MA  
See Special Instructions Below

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

- Kopi Plan Anyèl yo disponib nan biwo Administrasyon an oswa w ka revize anliy nan <https://tinyurl.com/LHA-MA-AnnualPlan>. Sa yo se nan lang Anglè sèlman.
- Yo gendwa soumèt kòmantè yo vèbalman nan odisyon an, pa imèl bay biwo administrasyon lojman an, oswa nan soumisyon kòmantè ekri w yo nan biwo administrasyon lojman an. Yo ta dwe voye kòmantè yo nan yon moman ki pa pi ta pase odisyon piblik la.
- Pou demand akomodasyon rezonab kontakte biwo administrasyon lojman an kote w ap 12/21/2022 a 5:00 PM.
- Enfòmasyon kontak pou Littleton Housing Authority:  
Biwo: 19 Shattuck St., Littleton, MA 01460  
Telefòn: (978) 486-8833  
Imèl: Littletonh@aol.com

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## Littleton Housing Authority Proposed Annual Plan for Fiscal Year 2024 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 Littleton Housing Authority's Annual Plan for their 2024 fiscal year includes the following components:

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

**State-Aided Public Housing Developments**

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

| Dev No | Type    | Development Name        | Num Bldgs | Year Built | Dwelling Units |
|--------|---------|-------------------------|-----------|------------|----------------|
| 705-01 | Family  | PATRIOT CIRCLE 705-01   | 6         | 1990       | 12             |
| 667-01 | Elderly | PINE TREE PARK 667-01   | 9         | 1975       | 48             |
|        | Other   | Special Occupancy units | 2         |            | 8              |
| Total  |         |                         | 17        |            | 68             |

**Massachusetts Rental Voucher Program (MRVP)**

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

Littleton Housing Authority manages 18 MRVP vouchers.

**LHA Central Office**

Littleton Housing Authority  
19 Shattuck St., Littleton, MA, 01460  
Lisa Larrabee, Management Agent  
Phone: 978-486-8833  
Email: llarrabee@littletonha.org

### LHA Board of Commissioners

|                  | <u>Role</u> | <u>Category</u>  | <u>From</u> | <u>To</u>  |
|------------------|-------------|------------------|-------------|------------|
| Gino Frattallone | Vice-Chair  | State Appointee  | 05/02/2016  | 05/02/2023 |
| Ben Hankins      |             | State Tenant Rep | 09/15/2021  | 05/31/2026 |
| Bartlett Harvey  | Chair       |                  | 05/01/2017  | 05/01/2025 |
| Mildred McGovern | Member      |                  | 05/01/2017  | 05/01/2027 |
| Matthew Nordhaus |             |                  | 06/01/2019  | 05/01/2025 |

### 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.                                                                                       | 11/04/2022     |
| B.          | Advertise the public hearing in public postings.                                                                                       | 11/04/2022     |
| C.          | Notify all LTO's and RAB, if there is one, of the hearing and provide access to the Proposed Annual Plan.                              | N/A            |
| D.          | Post draft AP for tenant and public viewing.                                                                                           | 11/04/2022     |
| E.          | Hold quarterly meeting with LTO or RAB to review the draft AP. (Must occur before the LHA Board reviews the Annual Plan.)              | N/A            |
| F.          | Annual Plan Hearing. Hosted by the LHA Board, with a quorum of members present. (For Boston, the Administrator will host the hearing.) |                |
| G.          | Executive Director presents the Annual Plan to the Board.                                                                              |                |
| H.          | Board votes to approve the AP. (For Boston Housing Authority, the Administrator approves and submits the AP.)                          |                |

**Overview and Certification**

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

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

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

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

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

The CIP includes the following parts:

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

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

| Category of Funds                              | Allocation     | Planned Spending | Description                                                                                        |
|------------------------------------------------|----------------|------------------|----------------------------------------------------------------------------------------------------|
| Balance of Formula Funding (FF)                | \$427,400.03   |                  | Total of all FF awards minus prior FF spending                                                     |
| LHA Emergency Reserve                          | \$42,740.00    |                  | Amount to reserve for emergencies                                                                  |
| Net FF Funds (First 3 Years of the CIP)        | \$384,660.03   | \$398,322.11     | Funds to plan & amount actually planned in the first 3 years of the CIP                            |
| ADA Set-aside                                  | \$2,298.78     | \$2,298.78       | Accessibility projects                                                                             |
| DMH Set-aside                                  | \$0.00         | \$0.00           | Dept. of Mental Health facility                                                                    |
| DDS Set-aside                                  | \$40,852.14    | \$40,018.36      | Dept. of Developmental Services facility                                                           |
| Unrestricted Formula Funding (FF)              | \$341,509.11   | \$356,004.97     | Funds awarded by DHCD to be used on projects selected by the LHA and approved by DHCD.             |
| Special DHCD Funding                           | \$904,747.77   | \$904,747.77     | 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               | \$1,289,407.80 | \$1,303,069.88   | Total of all anticipated funding available for planned projects and the total of planned spending. |

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

Littleton 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 |
|------------------------|------------------------------------------------------|-----------------------|------------|----------------------------|----------------------------|----------------|-----------|--------|--------|--------|
| 158056                 | FF: EMG Boiler Replacement-Emergency Reserve Request | PINE TREE PARK 667-01 | \$14,167   | \$14,167                   | \$0                        | \$0            | \$0       | \$0    | \$0    | \$0    |
| 158057                 | FF: EMG Apple Building Unit 1 Mold Intrusion         | PINE TREE PARK 667-01 | \$2,440    | \$0                        | \$0                        | \$2,148        | \$0       | \$0    | \$0    | \$0    |
| 158059                 | FY19 SUS ENERGY ASHP Community Building/Maintenance  | PINE TREE PARK 667-01 | \$9,920    | \$0                        | \$0                        | \$9,920        | \$0       | \$0    | \$0    | \$0    |
| 158061                 | FF: LED Wall Packs-Dev Wide                          | PINE TREE PARK 667-01 | \$9,531    | \$0                        | \$0                        | \$9,531        | \$0       | \$0    | \$0    | \$0    |
| 158062                 | FF: Door Closer Project-Dev wide                     | PINE TREE PARK 667-01 | \$5,040    | \$0                        | \$0                        | \$5,040        | \$0       | \$0    | \$0    | \$0    |
| 158063                 | FF: New mailbox for community building               | PINE TREE PARK 667-01 | \$7,538    | \$0                        | \$0                        | \$7,538        | \$0       | \$0    | \$0    | \$0    |
| 158064                 | FF: Paving and asphalt repair                        | PATRIOT CIRCLE 689-01 | \$65,080   | \$65,080                   | \$0                        | \$0            | \$0       | \$0    | \$0    | \$0    |
| 158065                 | FF: EMG mold Project                                 | PATRIOT CIRCLE 689-01 | \$5,000    | \$0                        | \$0                        | \$5,000        | \$0       | \$0    | \$0    | \$0    |
| 158067                 | *EMG* Mold Remediation 19D                           | PATRIOT CIRCLE 705-01 | \$9,986    | \$0                        | \$0                        | \$9,986        | \$0       | \$0    | \$0    | \$0    |
| 158068                 | Septic Tank Replacement Dev-Wide                     | PINE TREE PARK 667-01 | \$616,336  | \$13,000                   | \$0                        | \$184,062      | \$419,274 | \$0    | \$0    | \$0    |
| 158070                 | Vacant Unit Initiative Birch 10                      | PINE TREE PARK 667-01 | \$101,960  | \$8,200                    | \$0                        | \$78,686       | \$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 |
|------------------------|-----------------------------------------|-----------------------|------------|----------------------------|----------------------------|----------------|----------|----------|-----------|--------|
| 158071                 | *Vacant Unit Requests both 689s         | PATRIOT CIRCLE 689-01 | \$229,825  | \$7,760                    | \$0                        | \$222,065      | \$0      | \$0      | \$0       | \$0    |
| 158072                 | *Vacant Unit Request* 19H               | PATRIOT CIRCLE 705-01 | \$128,218  | \$3,120                    | \$0                        | \$120,216      | \$4,882  | \$0      | \$0       | \$0    |
| •                      | Replace tile showers with Tub Surrounds | PINE TREE PARK 667-01 | \$138,243  | \$0                        | \$0                        | \$0            | \$79,094 | \$59,150 | \$0       | \$0    |
| •                      | Phase 2 of Dev Wide Paving              | PINE TREE PARK 667-01 | \$314,131  | \$0                        | \$0                        | \$0            | \$0      | \$76,562 | \$237,570 | \$0    |
| •                      | 689-Tree Removal                        | PATRIOT CIRCLE 689-01 | \$2,194    | \$0                        | \$0                        | \$0            | \$2,194  | \$0      | \$0       | \$0    |

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

| Cap Hub<br>Project<br>Number | Project Name                           | DHCD Special<br>Award<br>Comment      | Special DHCD Awards  |                       |                     |                   | Other Funding |     |                      |                |
|------------------------------|----------------------------------------|---------------------------------------|----------------------|-----------------------|---------------------|-------------------|---------------|-----|----------------------|----------------|
|                              |                                        |                                       | Emergency<br>Reserve | Compliance<br>Reserve | Sustain-<br>ability | Special<br>Awards | CDBG          | CPA | Operating<br>Reserve | Other<br>Funds |
| 158067                       | *EMG* Mold<br>Remediation 19D          | water leak damage<br>& mold clean up  | \$2,448              | \$0                   | \$0                 | \$0               | \$0           | \$0 | \$0                  | \$0            |
| 158068                       | Septic Tank<br>Replacement<br>Dev-Wide | septic system<br>replacement          | \$616,336            | \$0                   | \$0                 | \$0               | \$0           | \$0 | \$0                  | \$0            |
| 158070                       | Vacant Unit<br>Initiative Birch 10     | ARPA Formula<br>Funding               | \$0                  | \$0                   | \$0                 | \$54,814          | \$0           | \$0 | \$0                  | \$0            |
| 158071                       | *Vacant Unit<br>Requests both<br>689s  | vacant unit rehab<br>budget shortfall | \$0                  | \$0                   | \$0                 | \$192,000         | \$0           | \$0 | \$0                  | \$0            |
| 158072                       | *Vacant Unit<br>Request* 19H           | rehab of unit 19H                     | \$65,000             | \$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.

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

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

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

**2. Request for additional funding.**

A Housing Authority may request additional funding from DHCD for projects that qualify as emergencies, required legal compliance upgrades, or sustainability improvements.

Littleton Housing Authority has not requested additional funding.

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

Our overall goal is to provide decent safe and sanitary housing for our residents. We're accomplishing that by addressing our most deteriorated units through capital improvements so we can get them occupied once again.

**4. Changes from the Housing Authority's previous CIP**

Every new CIP differs from the previous CIP because projects have been completed and a new year has been added with new projects. These changes and other significant changes to the content of the CIP are highlighted below:

There have been no changes

**5. Requirements of previous CIP approval**

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

**6. Quarterly capital reports**

Our most recent quarterly capital report (form 80 and 90) was submitted on 08/12/2022.

**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 09/01/2022.

**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 have identified the following accessibility deficiencies in our portfolio:

We're currently in the process of fully renovating an ADA unit

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

10 Birch is being renovated into an ADA unit.

**11. Special needs development**

Littleton 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 09/01/2022.

**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<br>PUM > Threshold | Gas<br>PUM > Threshold | Oil<br>PUM > Threshold | Water<br>PUM > Threshold |
|----------------|-----------------------------|------------------------|------------------------|--------------------------|
| Threshold PUM: | \$100                       | \$80                   | \$50                   | \$60                     |

No developments exceed threshold values.

### 13. Energy or water saving initiatives

Littleton 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.

AP-2024-Littleton Housing Authori-00704 had an energy audit under the Low-Income Energy Affordability Network (LEAN) program on 06/13/2020

### 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.)

13% c. 667 (DHCD Goal 2%)

0% c. 200 (DHCD Goal 2%)

17% c. 705 (DHCD Goal 2%)

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

The 705 vacancy rate is due to them being offline for capital projects. They will be rented after they are completed.

The 667- has 2 units ready to occupied but we are holding them for the Leicester Fire victims.

We also have a unit renovation project at 10 Birch. And another unit was just rented, so the 667 vacancy % should go down significantly.

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 Littleton 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 LHA at Phone Number | 978-486-8833  | Monday - Thursday 8:30 AM to 3:30 |
| Other                    | 978-490-9234  | 24/7                              |

If a tenant forgets to call the emergency maintenance phone number and leaves a message on the office voice mail, the voice mail is automatically forwarded to the Executive Director's cell phone. Also, the Executive Director has a good working relationship with the Littleton Fire and Police Departments so if they are called for any reasons for an emergency, she is contacted by each department.

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 Littleton 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                                          |
| Door or window lock failure                        |
| No heat                                            |
| No hot water                                       |
| Snow or ice hazard condition                       |
| Dangerous structural defects                       |
| Inoperable smoke/CO detectors, beeping or chirping |

### Normal Maintenance Request Process

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

| METHOD                        | CONTACT INFO.             | TIMES                                |
|-------------------------------|---------------------------|--------------------------------------|
| Text Phone Number             |                           |                                      |
| Call Answering Service        |                           |                                      |
| Call Housing Authority Office | 978-486-8833              | Monday - Thursday 8:30 AM to 3:30 PM |
| Submit Online at Website      |                           |                                      |
| Email to Following Email      | mdinsmore@littletonha.org | 24/7                                 |
| Other                         | Maintenance request form  | 24/7                                 |

### Work Order Management

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

Type of work order system: PHANetwork

Work order classification used:

|                          |   |
|--------------------------|---|
| Emergency                | ✓ |
| Vacancy                  | ✓ |
| Preventative Maintenance | ✓ |
| Routine                  |   |
| Inspections              | ✓ |
| Tenant Requests          | ✓ |

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

C. Our work order process includes the following steps:

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

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

The Board of Commissioners is provided a verbal update and an additional printout at each board meeting for the prior month of work orders both complete or in-complete.

### **Maintenance Plan Narrative**

Following are Littleton 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?

We feel that we are improving our status due to the new maintenance person we have hired. We also made further improvements by implementing PHA-Web

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

We have implemented PHA-Web and we are now sharing maintenance staff between Littleton, Westford, & Groton

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

To continue to improve service to the residents as well as to turn over vacant unit more quickly. Upon completion of unit inspections we holding tenants responsible for damage done to their units.

**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          | \$117,597.00                     | \$0.00                           |
| Last Fiscal Year Actual Spending | \$162,754.00                     | \$0.00                           |
| Current Fiscal Year Budget       | \$80,700.00                      | \$2,700.00                       |

**E. Unit Turnover Summary**

|                                                                 |          |
|-----------------------------------------------------------------|----------|
| # Turnovers Last Fiscal Year                                    | 6        |
| Average time from date vacated to make Unit "Maintenance Ready" | 149 days |
| Average time from date vacated to lease up of unit              | 157 days |

**Attachments**

These items have been prepared by the Littleton 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.

# **Maintenance Plan**

## **Littleton Housing Authority**

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## Table of Contents

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-

General description and Instructions

(See specific sections for additional instructions)

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## Maintenance Plan Document – Description, Instructions

The **Maintenance Plan (MP)** document has separate fillable sections for the Annual Plan and the PMR Components. The Housing Authority (**HA**) should complete and return these sections to the CW RCAT (Phaldie Taliep).

### 1. Annual Plan Component (in Word)

#### a. Statement of Priorities

- Definitions of Emergency, Vacancy Refurbishment, Preventive Maintenance, Programmed Maintenance, Requested Maintenance.

#### b. Emergency Response Standard Operating Procedure or SOP

- How the Housing Authority (**HA**) responds to an emergency call and how the Staff and Residents are informed about what constitutes an Emergency.

#### c. Normal Maintenance Response SOP

- How the Housing Authority (**HA**) responds to a Regular Maintenance Call (a non-emergency) and how the Staff and Residents are informed about what constitutes a Regular Maintenance Call.

#### d. Maintenance Plan Summary/Narrative

- A summary of Budgets and Deferred Maintenance.

#### e. Work Order Management

- How Work Orders are managed by the **HA**.

### 2. PMR Component (in Word). An Excel File is also attached (as a separate document).

#### a. Work Plan for Preventive and Routine Maintenance, and Inspections (Word)

- A Schedule and Checklist of various Maintenance and Inspections items.
- The Checklist items and the Schedule (when work is performed) are both editable by the **HA and Maintenance** to suit specific local conditions and procedures.

## Appendix

### i. Appendix 1 - Development Information (667, 689, or 705).

This form would be used to summarize what exists at each Development (667-1, 667-2, 689-1, or 705-1). Information would be collected on a development-by-development basis.

### ii. Appendix 2 – Building Systems

This is for use by Maintenance to allow for collection of information specific to each development.

The information could be filed in a 3-ring binder with warranty and other documentation of the various building systems (fire alarm, heating, hot water, elevators, electrical) at each of the HAs developments.

### iii. Appendix 3 – Maintenance Policy (Sample)

This should be edited by the **HA**

**Commented [JM1]:** Reiterate that appendices are not required for MP submission but are recommended to be used for Authority's records.

## **Housing Authority General Maintenance & Repair Statement of Priorities**

- I. **Emergencies** - Emergencies are only those conditions which are **immediately threatening** to the life or safety of our residents, staff, or structures.
  - **Goal: initiated with 24 to 48 hours.**
- II. **Vacancy Refurbishment** - Work necessary to make empty units ready for new tenants.
  - After emergencies the refurbishment of vacancies for immediate re-occupancy has the highest priority for staff assignments. **Everyday a unit is vacant is a day of lost rent.**
  - **Goal: vacancy work orders are completed within 30 calendar days or if not completed within that timeframe, LHA has a waiver.**
- III. **Preventive Maintenance** - Work which must be done to **preserve and extend the useful life** of various elements of your physical property and avoid emergency situations.
  - A thorough Preventive Maintenance Program and Schedule that deals with all elements of the physical property is provided later in the document.
  - The Preventive Maintenance Program is reviewed and updated annually and as new systems and facilities are installed.
- IV. **Programmed Maintenance** - Work which is important and is completed to the greatest extent possible within time and budget constraint. Programmed maintenance is grouped and scheduled to make their completion as efficient as possible. Sources of programmed maintenance include:
  1. **Routine Work** includes those tasks that need to be done on a regular basis to keep our physical property in good shape. (Mopping, Mowing, Raking, Trash, etc.)
  2. **Inspections** are the other source of programmed maintenance.
    - Inspections are visual and operational examinations of parts of our property to determine their condition.
    - All dwelling units, buildings and properties **must be inspected at least annually.**
    - **Goal: Inspection work orders are completed within 30 calendar days from the date of inspection, 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.**

**Note: If the LHA has any other Work Order types, please list them below with any other additional comments.**

**Additional LHA comments/content:**



**Emergency Response System-Standard Operating Procedure (SOP) (2 pages)****Emergency Response System – Two Key Parts:**

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

**System for Responding to Emergencies:**

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

| YES | NO |
|-----|----|
| *   |    |

2. List of Emergencies.

The following is a list of matters that DHCD and the State Sanitary Code the [LHA] deems an Emergency. If you have any questions regarding this list or other matters that may constitute an Emergency, please contact the [LHA] main office.

| EMERGENCY                                                                                         | YES | NO | N/A |
|---------------------------------------------------------------------------------------------------|-----|----|-----|
| Fires of any kind                                                                                 | *   |    |     |
| Gas leaks                                                                                         | *   |    |     |
| Electric power failures                                                                           | *   |    |     |
| Elevator stoppage                                                                                 |     |    | *   |
| Broken water pipes                                                                                | *   |    |     |
| Sewer blockage                                                                                    | *   |    |     |
| Roof drain blockage                                                                               | *   |    |     |
| Roof leak                                                                                         | *   |    |     |
| Security lock failure                                                                             | *   |    |     |
| Lock outs                                                                                         |     | *  |     |
| No heat                                                                                           | *   |    |     |
| Inoperative refrigerator                                                                          | *   |    |     |
| Snow or ice storm                                                                                 | *   |    |     |
| Inadequate or unsafe water supply.                                                                | *   |    |     |
| Inadequate heat, improper venting or air supply, or air supply which deprives a bedroom or        | *   |    |     |
| Un-restored shut off of electricity or gas.                                                       | *   |    |     |
| Inadequate electrical facilities or electrical hazards.                                           | *   |    |     |
| Inoperable toilet or sewage disposal system.                                                      | *   |    |     |
| Inadequate, obstructed or exits, passageways, or fire escapes, in disrepair (incl. snow and ice). | *   |    |     |
| Accumulation of garbage, rubbish or filth.                                                        | *   |    |     |
| Failure to provide physical security to the building main and Unit entrances                      | *   |    |     |
| Roof, foundation, elevator or other structural defect of immediate danger.                        | *   |    |     |

Annual Plan Component

|                                                                                                                                                                                        |   |  |  |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---|--|--|
| Plumbing, heating or gas burning facilities which expose occupants or public to fire, burns, shock, accident or other danger, or water temperature below 110 or exceeding 130 degrees. | * |  |  |
| Defect in asbestos or activity or work in violation.                                                                                                                                   | * |  |  |
| Missing, inoperative or tenant disconnected smoke detector/CO2 detector.                                                                                                               | * |  |  |
| Discarded or unused refrigerator with door.                                                                                                                                            | * |  |  |
| Improper storage of LP gas or other volatile or flammable substances.                                                                                                                  | * |  |  |
| Infestation or improper storage of pesticides.                                                                                                                                         | * |  |  |
| Inoperable emergency lighting or exit signs                                                                                                                                            | * |  |  |
|                                                                                                                                                                                        |   |  |  |
|                                                                                                                                                                                        |   |  |  |
|                                                                                                                                                                                        |   |  |  |
|                                                                                                                                                                                        |   |  |  |
|                                                                                                                                                                                        |   |  |  |
|                                                                                                                                                                                        |   |  |  |

3. How can tenants get in contact with the LHA if they have an **Emergency** at any time day or night?  
(Complete all that apply and fill in the accompanying details)

| METHOD                                                 | CONTACT INFO. | TIMES                 |
|--------------------------------------------------------|---------------|-----------------------|
| Can Text Phone Number during following hours           | NO            | NO                    |
| Can Call (Maintenance Emergency Phone) at Phone Number | 978-302-6129  | ANYTIME               |
| Can Call LHA at Phone Number                           | 978-486-8833  | NORMAL BUSINESS HOURS |
| Can Submit Online at Website                           | NO            | NO                    |
| Can Email to Following Email                           | NO            | NO                    |
| Other                                                  |               |                       |
|                                                        |               |                       |

4. Has LHA distributed this Emergency Contact procedure to:

|                                   | YES | NO |
|-----------------------------------|-----|----|
| Tenants                           | *   |    |
| Staff                             | *   |    |
| Answering Service (if applicable) |     |    |

## **Normal Maintenance Response System-Standard Operating Procedure (SOP)**

### **Non-Emergency Response System:**

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

### **System for Responding to Non-Emergencies:**

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

| YES | NO |
|-----|----|
| *   |    |

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

| METHOD                                       | CONTACT INFO.                                                                                                                                        | TIMES                 |
|----------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------|
| Can Text Phone Number during following hours | NO                                                                                                                                                   | NO                    |
| Can Call (Answering Service) at Phone Number | NO                                                                                                                                                   | NO                    |
| Can Call LHA at Phone Number                 | 978-486-8833                                                                                                                                         | NORMAL BUSINESS HOURS |
| Can Submit Online at Website                 |                                                                                                                                                      |                       |
| Can Email to Following Email                 | <a href="mailto:mdinsmore@littletonha.org">mdinsmore@littletonha.org</a><br><a href="mailto:llarrabee@littletonha.org">llarrabee@littletonha.org</a> | ANYTIME               |
| FILL OUT WORK ORDER REQUEST FORM B           | BY OFFICE DOOR                                                                                                                                       | ANYTIME               |
|                                              |                                                                                                                                                      |                       |

3. Has LHA distributed this Contact procedure to:

|                                   | YES | NO |
|-----------------------------------|-----|----|
| Tenants                           | *   |    |
| Staff                             | *   |    |
| Answering Service (if applicable) |     |    |

Annual Plan Component

**Maintenance Plan Narrative**

|                                         |                                                                                                                                                          |
|-----------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Narrative Question # 1</b>           | <b>How would you assess your Maintenance Operations based on feedback you received from staff, tenants, DHCD (PMR &amp; AUP), and any other sources?</b> |
| Good but there is room for improvement. |                                                                                                                                                          |

|                                                                                                              |                                                                                                     |
|--------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------|
| <b>Narrative Question # 2</b>                                                                                | <b>What changes have you made to maintenance operations since your last Annual Plan submission?</b> |
| We are less responsive to routine work order requests and more responsive to making vacancy prep a priority. |                                                                                                     |

|                                                                                          |                                                              |
|------------------------------------------------------------------------------------------|--------------------------------------------------------------|
| <b>Narrative Question # 3</b>                                                            | <b>What are your maintenance goals for this coming year?</b> |
| More thorough unit inspections with follow up of letters to tenants on lease violations. |                                                              |

| <b><u>Maintenance Budget Summary</u></b> |                       |                                  |                |
|------------------------------------------|-----------------------|----------------------------------|----------------|
|                                          | <b>Overall Budget</b> | <b>Extraordinary Maintenance</b> | <b>Date</b>    |
| <b>Current Fiscal Year Budget</b>        | <b>105422</b>         | <b>0</b>                         | <b>3/31/20</b> |
| <b>Current Fiscal Year Spent to date</b> |                       |                                  |                |
| <b>This upcoming Fiscal year Budget</b>  |                       |                                  |                |

| <b><u>Unit Turnover Summary</u></b>                  |                 |
|------------------------------------------------------|-----------------|
| <b># Turnovers last Fiscal year</b>                  | <b>15</b>       |
| <b>Average time to make Unit "Maintenance Ready"</b> | <b>2 months</b> |
| <b>Average time to Lease –up unit</b>                | <b>1 month</b>  |

| <b><u>Additional LHA comments/content:</u></b>                                            |
|-------------------------------------------------------------------------------------------|
| One part time maintenance person does turnovers. We have no extra money to hire them out. |

**Work Order Management**

LHA Uses the following type of Work Order System to record and track all work completed.

| Type of Work Order System                                                                | Check One | Comments |
|------------------------------------------------------------------------------------------|-----------|----------|
| Computer Software System-Web Based (e.g. PHA Network, HAB, PHA-Web, etc.)                |           |          |
| Computer Software System-Non-Web based (e.g. SHARP (MS Access), MS Excel, MS Word, etc.) | *         |          |
| Manual System—Please specify in Comments section                                         |           |          |
| Other-Please Specify in Comments section                                                 |           |          |

Work orders are created using the following types/categories: (check all that apply)

|                        |   |
|------------------------|---|
| Emergency              | * |
| Vacancy                | * |
| Preventive Maintenance | * |
| Inspections            | * |
| Routine                | * |
| Tenant Requests        | * |
| Other-Please specify   |   |

**Work Order Process:**

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

If the above process differs for any of the categories of Work Orders please describe how the process differs:

## **Maintenance Schedules and Checklists**

### **Instructions**

- 1. LHAs should complete the Schedule and Checklists in accordance with its Maintenance Policy.**
- 2. LHAs should use the information collected on Appendix 1 and Appendix 2 as input for the three (3) Schedule and Checklists (for Routine Maintenance, Preventive Maintenance, and Unit Inspections).**

## **Routine Maintenance Schedule and Checklist**

## Routine Maintenance Schedule and Checklist

|                  |
|------------------|
| <b>LHA NAME:</b> |
|------------------|

## DEVELOPMENT:

| Landscaping and Grounds Routine Maintenance |   |   |   |   |   |   |   |   |    |
|---------------------------------------------|---|---|---|---|---|---|---|---|----|
| 1                                           | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |

[illegible]



| Building Routine Maintenance                                                                        |                  |       |     |     |     |     |     |     |     |     |     |     |     |     |  |
|-----------------------------------------------------------------------------------------------------|------------------|-------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|--|
| Building Interior                                                                                   |                  |       |     |     |     |     |     |     |     |     |     |     |     |     |  |
| TASK                                                                                                | Frequency        | By    | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec |  |
| Hallways, Stairs, Lobbies, Community Rm - Vacuum carpet, mop floors, sweep and Vacuum public spaces | Bi-Weekly        | Staff | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   |  |
| Wash windows in public areas                                                                        | Bi-Weekly        | Staff | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   |  |
| Toilets - Clean public toilets/restrooms                                                            | Bi-Weekly        | Staff | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   |  |
| Clean Staff toilets/restrooms                                                                       | Bi-Weekly        | Staff | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   |  |
| Offices- Sweep / Vacuum offices                                                                     | Bi-Weekly        | Staff | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   |  |
| Light Bulbs - Replace if burnt out in common areas and offices                                      | As Needed        | Staff | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   |  |
| Elevators- Clean cab walls and doors                                                                | NONE             | Staff | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   |  |
| Sweep / Mop / Vacuum elevator floors                                                                | NONE             | Staff | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   |  |
| Trash Chutes, Dumpsters- Clean trash chutes                                                         | Weekly           | Staff | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   |  |
| Clean dumpster areas                                                                                | Weekly           | Staff | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   |  |
|                                                                                                     |                  |       |     |     |     |     |     |     |     |     |     |     |     |     |  |
|                                                                                                     |                  |       |     |     |     |     |     |     |     |     |     |     |     |     |  |
|                                                                                                     |                  |       |     |     |     |     |     |     |     |     |     |     |     |     |  |
| Other Routine Maintenance                                                                           |                  |       |     |     |     |     |     |     |     |     |     |     |     |     |  |
| Inventory, Meeting, Training, Tools                                                                 |                  |       |     |     |     |     |     |     |     |     |     |     |     |     |  |
| TASK                                                                                                | Frequency        | By    | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec |  |
| Maintain Authority inventory                                                                        | Quarterly        | Staff |     |     | X   |     |     | X   |     |     | X   |     |     | X   |  |
| Attend Staff meetings                                                                               | Quarterly        | Staff |     |     | X   |     |     | X   |     |     | X   |     |     | X   |  |
| Attend Training sessions                                                                            | Annual           | Staff |     |     |     | X   |     |     |     |     |     |     |     |     |  |
| Clean and sharpen tools                                                                             | Monthly          | Staff | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   |  |
| Sharpen mower blades (after each Mowing)                                                            | Weekly / Monthly | Staff |     |     |     | X   | X   | X   | X   | X   | X   |     |     |     |  |
|                                                                                                     |                  |       |     |     |     |     |     |     |     |     |     |     |     |     |  |
|                                                                                                     |                  |       |     |     |     |     |     |     |     |     |     |     |     |     |  |
|                                                                                                     |                  |       |     |     |     |     |     |     |     |     |     |     |     |     |  |

**NOTE: Routine (and Emergency) Work Orders will be created due to results from Inspections Maintenance Tasks.**

## **Preventive Maintenance Schedule and Checklist**

## Preventive Maintenance Schedule and Checklist

|                  |
|------------------|
| <b>LHA NAME:</b> |
|------------------|

|                     |  |
|---------------------|--|
| <b>DEVELOPMENT:</b> |  |
|---------------------|--|

## Buildings & Grounds Preventive Maintenance

## Building Envelope

[illegible]

| Preventive Maintenance Schedule and Checklist                                                                |           |                |              |     |     |     |     |     |     |     |     |     |     |     |  |
|--------------------------------------------------------------------------------------------------------------|-----------|----------------|--------------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|--|
| LHA NAME:                                                                                                    |           |                | DEVELOPMENT: |     |     |     |     |     |     |     |     |     |     |     |  |
| Buildings & Grounds Preventive Maintenance                                                                   |           |                |              |     |     |     |     |     |     |     |     |     |     |     |  |
| Building Interior                                                                                            |           |                |              |     |     |     |     |     |     |     |     |     |     |     |  |
| TASK                                                                                                         | Frequency | By             | Jan          | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec |  |
| WOOD FLOORS - Refinish                                                                                       | NONE      | Staff / Vendor |              |     |     |     |     |     |     |     |     |     |     |     |  |
| VINYL FLOORS - Refinish, polish                                                                              | As Needed | Staff          |              |     |     |     |     |     |     |     |     |     |     |     |  |
| CEILINGS - Refinish                                                                                          | As Needed | Staff / Vendor |              |     |     |     |     |     |     |     |     |     |     |     |  |
| WALLS - Refinish                                                                                             | As Needed | Staff / Vendor |              |     |     |     |     |     |     |     |     |     |     |     |  |
| WALLS - Recaulk (kitchen and bath)                                                                           | As Needed | Staff / Vendor |              |     |     |     |     |     |     |     |     |     |     |     |  |
| FLOORS - Professionally clean common area carpet                                                             | As Needed | Vendor         |              |     |     | X   |     |     |     |     |     |     |     |     |  |
| WALLS - Wash off hand prints and dirt in high traffic areas                                                  | Weekly    | Staff          | X            | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   |  |
|                                                                                                              |           |                |              |     |     |     |     |     |     |     |     |     |     |     |  |
|                                                                                                              |           |                |              |     |     |     |     |     |     |     |     |     |     |     |  |
|                                                                                                              |           |                |              |     |     |     |     |     |     |     |     |     |     |     |  |
|                                                                                                              |           |                |              |     |     |     |     |     |     |     |     |     |     |     |  |
|                                                                                                              |           |                |              |     |     |     |     |     |     |     |     |     |     |     |  |
|                                                                                                              |           |                |              |     |     |     |     |     |     |     |     |     |     |     |  |
|                                                                                                              |           |                |              |     |     |     |     |     |     |     |     |     |     |     |  |
|                                                                                                              |           |                |              |     |     |     |     |     |     |     |     |     |     |     |  |
| Pest Control                                                                                                 |           |                |              |     |     |     |     |     |     |     |     |     |     |     |  |
| PEST CONTROL - Notify residents, Apply Chemicals                                                             | As Needed | Vendor         | X            | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   |  |
| Common Kitchen, Laundry                                                                                      |           |                |              |     |     |     |     |     |     |     |     |     |     |     |  |
| KITCHEN - Clean Range, Microwave, Refrigerator                                                               | Annually  | Staff          | X            | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   |  |
| GAS STOVE - Valve and line cleaning                                                                          | NONE      | Vendor         |              |     |     |     |     |     |     |     | X   |     |     |     |  |
| LAUNDRY - Wipe surfaces, empty trash, mop floor, clean behind machines, check lint traps and clean as needed | Bi-Weekly | Staff          | X            | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   |  |
| LAUNDRY - Professionally clean dryer vents                                                                   | Annually  | Vendor         |              |     |     |     |     |     |     |     | X   |     |     |     |  |
|                                                                                                              |           |                |              |     |     |     |     |     |     |     |     |     |     |     |  |
|                                                                                                              |           |                |              |     |     |     |     |     |     |     |     |     |     |     |  |
|                                                                                                              |           |                |              |     |     |     |     |     |     |     |     |     |     |     |  |

P M R Component

| Trash / Recycling Room                                                                                               |                 |                |     |     |     |     |     |     |     |     |     |     |     |     |
|----------------------------------------------------------------------------------------------------------------------|-----------------|----------------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|
| TASK                                                                                                                 | Frequency       | By             | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec |
| Clean, mop floor, wash out containers                                                                                | NONE            | Staff          | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   |
| Cans (Trash / Recycle) - Regular pickup                                                                              | NONE            | Staff          | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   |
|                                                                                                                      |                 |                |     |     |     |     |     |     |     |     |     |     |     |     |
|                                                                                                                      |                 |                |     |     |     |     |     |     |     |     |     |     |     |     |
|                                                                                                                      |                 |                |     |     |     |     |     |     |     |     |     |     |     |     |
| Landscaping                                                                                                          |                 |                |     |     |     |     |     |     |     |     |     |     |     |     |
| Aerate lawn/overseed/top dress with compost                                                                          | As Needed       | Staff          |     |     |     | X   |     |     |     |     |     |     |     |     |
| Mulch landscape beds                                                                                                 | NONE            | Staff          |     |     |     | X   |     |     |     |     |     |     |     |     |
| Shrubs, Trees (remove broken, dead, deformed branches)                                                               | As Needed       | Staff          | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   |
| Remove weeds (don't let weeds go to seed)                                                                            | AS WE HAVE TIME | Staff          | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   |
| Protect Shrubs (winter)                                                                                              | NO              |                |     |     |     |     |     |     |     |     |     | X   | X   |     |
| <b>Pest / Disease</b> - Monitor, Integrated Pest Mgmt & Natural Gardening. DON'T use products harmful to environment | NO              | Staff          |     |     |     | X   | X   | X   | X   | X   | X   | X   |     |     |
| <b>Watering/Irrigation</b> - soak (dry out before watering again)                                                    | NO              | Staff          |     |     |     | X   | X   | X   | X   | X   | X   | X   |     |     |
|                                                                                                                      |                 |                |     |     |     |     |     |     |     |     |     |     |     |     |
|                                                                                                                      |                 |                |     |     |     |     |     |     |     |     |     |     |     |     |
|                                                                                                                      |                 |                |     |     |     |     |     |     |     |     |     |     |     |     |
|                                                                                                                      |                 |                |     |     |     |     |     |     |     |     |     |     |     |     |
| Irrigation System                                                                                                    |                 |                |     |     |     |     |     |     |     |     |     |     |     |     |
| <b>Spring (Start) / Fall (Shutdown)</b> - blow out lines                                                             | NONE            | Vendor         |     |     |     |     | X   |     |     |     |     | X   |     |     |
| Grounds                                                                                                              |                 |                |     |     |     |     |     |     |     |     |     |     |     |     |
| <b>Signage</b> - inspect, clean, repair as needed                                                                    | Monthly         | Staff          | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   |
| <b>Walks, Paving, Curbs</b> - monitor, clean, repair as needed                                                       | Monthly         | Staff          | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   |
| <b>Parking Lot</b> - Monitor condition, clean and reseal as needed                                                   | Annually        | Staff / Vendor |     |     |     |     |     |     |     |     | X   |     |     |     |
| <b>Fence</b> - monitor condition, clean and repaint as needed                                                        | Annually        | Staff          |     |     |     |     | X   |     |     |     |     |     |     |     |
|                                                                                                                      |                 |                |     |     |     |     |     |     |     |     |     |     |     |     |
|                                                                                                                      |                 |                |     |     |     |     |     |     |     |     |     |     |     |     |
|                                                                                                                      |                 |                |     |     |     |     |     |     |     |     |     |     |     |     |

P M R C o m p o n e n t

PMR Component

| 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    | Staff / Vendor |     |     |     |     |     |     |     |     | X   |     |     |     |
| FCU, Window AC Filters, Duct Cleaning - Clean, Replace as needed | NONE        | Staff          |     |     |     |     | X   |     |     |     |     |     | X   |     |
| Air Source Heat Pumps - Check Oil                                | NONE        | Staff          | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   |
| Co-Gen System                                                    | NONE        | Vendor         |     |     |     |     | X   |     |     |     |     |     | X   |     |
|                                                                  |             |                |     |     |     |     |     |     |     |     |     |     |     |     |
|                                                                  |             |                |     |     |     |     |     |     |     |     |     |     |     |     |
| Water system                                                     |             |                |     |     |     |     |     |     |     |     |     |     |     |     |
| Test / Check Water Temperatures                                  | Annually    | Staff          |     |     |     |     |     |     |     |     |     | X   |     |     |
| Lubricate valves and pumps                                       | As Needed   | Vendor         |     |     |     |     | X   |     |     |     |     | X   |     |     |
| Clean, Test integrity, Change Washers                            | As Needed   | Staff / Vendor |     |     |     |     |     |     |     |     | X   |     |     |     |
| Test pressure                                                    | Weekly      | Staff          | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   |
|                                                                  |             |                |     |     |     |     |     |     |     |     |     |     |     |     |
| Plumbing                                                         |             |                |     |     |     |     |     |     |     |     |     |     |     |     |
| Toilets - check for leaks, running water                         | Annually    | Staff          |     |     |     |     |     | X   |     |     |     |     |     |     |
| Faucets and shut-offs - check for leaks, drips                   | Annually    | Staff          |     |     |     |     |     | X   |     |     |     |     |     |     |
| Boilers/HW Tanks - Inspect, service                              | Quarterly   | Staff / Vendor |     |     | X   |     |     | X   |     |     | X   |     |     | X   |
| Pumps - sump pump in basement, confirm operational               | NONE        | Staff          | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   |
|                                                                  |             |                |     |     |     |     |     |     |     |     |     |     |     |     |
|                                                                  |             |                |     |     |     |     |     |     |     |     |     |     |     |     |
|                                                                  |             |                |     |     |     |     |     |     |     |     |     |     |     |     |
| Fire Sprinklers                                                  |             |                |     |     |     |     |     |     |     |     |     |     |     |     |
| Inspect, Test Backflow                                           | Annually    | Vendor         |     |     |     |     |     | X   |     |     |     |     |     |     |
|                                                                  |             |                |     |     |     |     |     |     |     |     |     |     |     |     |
| Sanitary system                                                  |             |                |     |     |     |     |     |     |     |     |     |     |     |     |
| Clean, Lubricate valves and pumps                                | Bi-Annually | Vendor         |     |     |     |     | X   |     |     |     |     | X   |     |     |
| Replace toilet mechanism                                         | Every 5yrs  | Staff / Vendor |     |     |     |     |     |     |     |     | X   |     |     |     |
| Test system integrity                                            | Annually    | Staff / Vendor |     |     |     |     |     |     |     |     | X   |     |     |     |
|                                                                  |             |                |     |     |     |     |     |     |     |     |     |     |     |     |
|                                                                  |             |                |     |     |     |     |     |     |     |     |     |     |     |     |
| Storm drain system                                               |             |                |     |     |     |     |     |     |     |     |     |     |     |     |

P M R Component

| TASK                                                               | Frequency          | By             | Jan                                                                                                                                                                    | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec |
|--------------------------------------------------------------------|--------------------|----------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|
| Clean, Lubricate valves and pumps                                  | Bi-Annually        | Vendor         |                                                                                                                                                                        |     |     |     | X   |     |     |     |     | X   |     |     |
| Test system integrity                                              | Annually           | Staff / Vendor |                                                                                                                                                                        |     |     |     |     |     |     |     | X   |     |     |     |
| <b>Electrical system</b>                                           |                    |                |                                                                                                                                                                        |     |     |     |     |     |     |     |     |     |     |     |
| Tighten connections to electrical panels                           | As Needed          | Vendor         | Recommended by DHCD's Handbook.<br>However, if this was never performed, then it should be performed by licensed EC <u>after</u> an infrared test by a Testing Company |     |     |     |     |     |     |     |     |     |     |     |
| Clean, Test                                                        | As Needed          | Vendor         |                                                                                                                                                                        |     |     |     |     |     |     |     |     |     |     |     |
| Infrared Test                                                      | Every 5 - 10 Years | Vendor         |                                                                                                                                                                        |     |     |     |     |     |     |     |     |     |     |     |
| <b>Fire Alarms</b>                                                 |                    |                |                                                                                                                                                                        |     |     |     |     |     |     |     |     |     |     |     |
| <b>System (Hardwired) - Clean, Test</b>                            | Annually           | Vendor         |                                                                                                                                                                        |     |     |     |     |     | X   |     |     |     |     |     |
| <b>Fire Extinguishers - Test, Recharge, Replace (if necessary)</b> | Annually           | Vendor         |                                                                                                                                                                        |     |     |     |     |     | X   |     |     |     |     |     |
| <b>Generator</b>                                                   |                    |                |                                                                                                                                                                        |     |     |     |     |     |     |     |     |     |     |     |
| Test                                                               | NONE               | Automatic      | X                                                                                                                                                                      | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   |
| Lubricate                                                          | NONE               | Vendor         |                                                                                                                                                                        |     |     |     |     |     |     |     |     |     |     |     |
| Small Generators                                                   | NONE               | Staff          | X                                                                                                                                                                      | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   |
| <b>Emergency Lighting (Not on Generator)</b>                       |                    |                |                                                                                                                                                                        |     |     |     |     |     |     |     |     |     |     |     |
| Recharge batteries                                                 | Annually           | Vendor         |                                                                                                                                                                        |     |     |     |     |     | X   |     |     |     |     |     |
| Test                                                               | NO                 | Staff          | X                                                                                                                                                                      | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   |
| <b>ALL Light Fixtures</b>                                          |                    |                |                                                                                                                                                                        |     |     |     |     |     |     |     |     |     |     |     |
| Lighting - clean fixtures, replace lamps as needed                 | As Needed          | Staff          | X                                                                                                                                                                      | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   |
| <b>Security systems</b>                                            |                    |                |                                                                                                                                                                        |     |     |     |     |     |     |     |     |     |     |     |
| Test system                                                        | NONE               | Staff          | X                                                                                                                                                                      | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   |
| <b>Elevator system</b>                                             |                    |                |                                                                                                                                                                        |     |     |     |     |     |     |     |     |     |     |     |
| Test lights                                                        | NONE               | Staff          | X                                                                                                                                                                      | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   |
| Mechanical - professional service contract                         | NONE               | Vendor         |                                                                                                                                                                        |     | X   |     |     | X   |     |     | X   |     |     | X   |
| <b>Solid waste disposal system</b>                                 |                    |                |                                                                                                                                                                        |     |     |     |     |     |     |     |     |     |     |     |
| Clean compactors, Lubricate machinery                              | NONE               | Staff          | X                                                                                                                                                                      | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   |
| Lubricate trash chute doors                                        | NONE               | Staff          |                                                                                                                                                                        |     |     | X   |     |     |     |     |     | X   |     |     |
|                                                                    |                    |                |                                                                                                                                                                        |     |     |     |     |     |     |     |     |     |     |     |
|                                                                    |                    |                |                                                                                                                                                                        |     |     |     |     |     |     |     |     |     |     |     |
|                                                                    |                    |                |                                                                                                                                                                        |     |     |     |     |     |     |     |     |     |     |     |



PMR Component

| Dwelling Unit Preventive Maintenance                                   |                         |                |     |     |     |     |     |     |     |     |     |     |     |     |
|------------------------------------------------------------------------|-------------------------|----------------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|
| Heat and smoke detectors                                               |                         |                |     |     |     |     |     |     |     |     |     |     |     |     |
| TASK                                                                   | Frequency               | By             | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec |
| Battery Heat / Smoke Detectors - Test, Change batteries                | Annually                |                |     |     |     |     |     |     |     |     | X   |     |     |     |
| Test hardwired detectors (with System)                                 | Annually                |                |     |     |     |     |     |     |     |     | X   |     |     |     |
| Pest control                                                           |                         |                |     |     |     |     |     |     |     |     |     |     |     |     |
| Notify Residents, Install Chemicals                                    | As Needed               | Vendor         | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   |
| Floors                                                                 |                         |                |     |     |     |     |     |     |     |     |     |     |     |     |
| Refinish floors                                                        | At Turnover / As Needed |                |     |     |     |     |     |     |     |     |     |     |     |     |
| Ceilings                                                               |                         |                |     |     |     |     |     |     |     |     |     |     |     |     |
| Refinish                                                               | At Turnover / As Needed |                |     |     |     |     |     |     |     |     |     |     |     |     |
| Walls                                                                  |                         |                |     |     |     |     |     |     |     |     |     |     |     |     |
| Refinish                                                               | At Turnover / As Needed |                |     |     |     |     |     |     |     |     |     |     |     |     |
| Recaulk (kitchen and bath)                                             | At Turnover / As Needed |                |     |     |     |     |     |     |     |     |     |     |     |     |
| Kitchen fixtures                                                       |                         |                |     |     |     |     |     |     |     |     |     |     |     |     |
| KITCHEN - Clean Range, Microwave, Refrigerator                         | At Turnover             |                |     |     |     |     |     |     |     |     | X   |     |     |     |
| GAS STOVE - Valve and line cleaning                                    | NONE                    | Vendor         |     |     |     |     |     |     |     |     | X   |     |     |     |
| UNIT APPLIANCES - clean interior and exterior, vacuum under and behind | AT turnover             | Resident Staff |     |     |     |     |     | X   |     |     |     |     |     |     |
| HVAC fixtures                                                          |                         |                |     |     |     |     |     |     |     |     |     |     |     |     |
| Air Source Heat Pumps - Vacuum, Clean Condenser                        | NONE                    | Staff          |     |     |     |     |     |     |     |     |     | X   |     |     |
| Unit Forced Hot Water - Check for Air locks, Bleed                     | As Needed               | Staff / Vendor |     |     |     |     |     |     |     |     | X   | X   |     |     |
| Unit Electrical Baseboard - Vacuum around fins                         | As Needed               | Resident       |     |     |     |     |     |     |     |     |     | X   |     |     |
| Unit Forced Hot Air - Vacuum Vents                                     | As Needed               | Resident       |     |     |     |     |     |     |     |     |     | X   |     |     |
| Unit Bathroom Fans - Inspect, Vacuum, Clean covers                     | As Needed               | Resident       |     |     |     |     |     | X   |     |     |     |     |     |     |
|                                                                        |                         |                |     |     |     |     |     |     |     |     |     |     |     |     |
|                                                                        |                         |                |     |     |     |     |     |     |     |     |     |     |     |     |
|                                                                        |                         |                |     |     |     |     |     |     |     |     |     |     |     |     |
|                                                                        |                         |                |     |     |     |     |     |     |     |     |     |     |     |     |

PMR Component

| Machine Preventive Maintenance              |                                                      |        |     |     |     |     |     |     |     |     |     |     |     |     |
|---------------------------------------------|------------------------------------------------------|--------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|
| Automobile NONE                             |                                                      |        |     |     |     |     |     |     |     |     |     |     |     |     |
| TASK                                        | Frequency                                            | By     | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec |
| Lubricate, Change Filters                   | Per Manufacturers Recommendations                    | Vendor |     |     |     |     |     |     |     |     |     | X   |     |     |
| Change tires                                | Rotate Annually                                      | Vendor |     |     |     |     |     |     |     |     |     | X   |     |     |
| Replace brakes, other fixed life parts      | Per Manufacturers Recommendations                    | Vendor |     |     |     |     |     |     |     |     |     | X   |     |     |
| Change brushes on sweepers                  | Annually                                             | Vendor |     |     |     |     |     |     |     |     |     | X   |     |     |
| Annual Sticker (Vehicles, Trailers)         | Annually (Varies)                                    | Vendor |     |     |     |     |     |     |     |     |     |     |     |     |
| Small Engines NONE                          |                                                      |        |     |     |     |     |     |     |     |     |     |     |     |     |
| ALL WORK by Service Contract                | Per Manufacturers Recommendations                    | Vendor |     |     |     |     |     |     |     |     |     | X   |     |     |
| OIL - Check Level, Change, Replace Filter   | Per Manufacturers Recommendations                    | Staff  |     |     |     |     |     |     |     |     |     | X   |     |     |
| Air Filter - Replace Foam/Paper Air cleaner | Per Manufacturers Recommendations (OR Every Season)  | Staff  |     |     |     |     |     |     |     |     |     | X   |     |     |
| Replace Spark Plug, In-line Fuel Filter     | Per Manufacturers Recommendations (OR Every 100 Hrs) | Staff  |     |     |     |     |     |     |     |     |     | X   |     |     |
| Prep Work Season Start, Season End)         | Bi-Annually                                          | Staff  |     |     | X   |     |     |     |     |     |     | X   |     |     |
| Snow Removal and Sanding Equipment          | Annually                                             |        |     |     |     |     |     |     |     |     |     | X   |     |     |
|                                             |                                                      |        |     |     |     |     |     |     |     |     |     |     |     |     |
|                                             |                                                      |        |     |     |     |     |     |     |     |     |     |     |     |     |
|                                             |                                                      |        |     |     |     |     |     |     |     |     |     |     |     |     |

## **Inspection Schedule - Buildings, Grounds and Units**

| Inspections Schedule and Checklist             |                        |        |              |     |     |     |     |     |     |     |     |     |     |     |  |
|------------------------------------------------|------------------------|--------|--------------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|--|
| LHA NAME:                                      |                        |        | DEVELOPMENT: |     |     |     |     |     |     |     |     |     |     |     |  |
| Buildings & Grounds Inspections                |                        |        |              |     |     |     |     |     |     |     |     |     |     |     |  |
| Building Envelope                              |                        |        |              |     |     |     |     |     |     |     |     |     |     |     |  |
| TASK                                           | Frequency              | By     | Jan          | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec |  |
| ROOFS - Sloped/Flat and EPDM/Shingle/Metal     | Bi-Annually / Annually | Staff  |              |     |     | X   |     |     |     |     |     | X   |     |     |  |
| ROOFS - Cracks, water pooling, leaks, flashing | Bi-Annually / Annually | Staff  |              |     |     | X   |     |     |     |     |     | X   |     |     |  |
| WALLS - Brick, Vinyl, Shingle                  | Annually               | Staff  |              |     |     | X   |     |     |     |     |     |     |     |     |  |
| WINDOWS, DOORS - Seals, Operators              | Annually               | Staff  |              |     |     | X   |     |     |     |     |     |     |     |     |  |
| DECKS, EXT STAIRS - Wash                       | Annually               | Staff  |              |     |     | X   |     |     |     |     |     |     |     |     |  |
| FOUNDATIONS - Cracks, vent covers              | Annually               | Staff  |              |     |     | X   |     |     |     |     |     |     |     |     |  |
| Building Interior                              |                        |        |              |     |     |     |     |     |     |     |     |     |     |     |  |
| FLOORS - Wood, Vinyl, Carpet                   | Annually               | Staff  |              |     |     | X   |     |     |     |     |     |     |     |     |  |
| CEILINGS                                       | Annually               | Staff  |              |     |     | X   |     |     |     |     |     |     |     |     |  |
| WALLS                                          | Annually               | Staff  |              |     |     | X   |     |     |     |     |     |     |     |     |  |
| Pest Control                                   |                        |        |              |     |     |     |     |     |     |     |     |     |     |     |  |
| PEST CONTROL - Pests                           | Monthly / As Needed    | Vendor | X            | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   |  |
| Common Kitchen, Laundry                        |                        |        |              |     |     |     |     |     |     |     |     |     |     |     |  |
| KITCHEN - Inspect Appliances                   | Annually               | Staff  |              |     |     |     |     |     |     |     |     | X   |     |     |  |
| GAS STOVE - Inspect                            | Annually               | Vendor |              |     |     |     |     |     |     |     |     | X   |     |     |  |
| Kitchen, Bath - Cabinets, fixtures             | Annually               | Staff  |              |     |     |     |     |     |     |     |     | X   |     |     |  |
| LAUNDRY - Machines operational                 | Bi-Annually            | Staff  |              |     |     | X   |     |     |     |     |     | X   |     |     |  |
| Trash / Recycling Room                         |                        |        |              |     |     |     |     |     |     |     |     |     |     |     |  |
| Trash Container leaks                          | Monthly                | Staff  | X            | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   |  |
| Trash Chute doors                              | Monthly                | Staff  | X            | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   |  |
| Trash / Recycle Cans                           | Weekly / Bi-Monthly    | Staff  | X            | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   |  |
|                                                |                        |        |              |     |     |     |     |     |     |     |     |     |     |     |  |
|                                                |                        |        |              |     |     |     |     |     |     |     |     |     |     |     |  |
|                                                |                        |        |              |     |     |     |     |     |     |     |     |     |     |     |  |

PMR Component

| Landscaping                                               |                     |                |     |     |     |     |     |     |     |     |     |     |     |     |
|-----------------------------------------------------------|---------------------|----------------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|
| TASK                                                      | Frequency           | By             | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec |
| Lawn, Shrubs, Landscape Beds                              | Annually            | Staff          |     |     |     | X   |     |     |     |     |     |     |     |     |
| Pest / Disease - Monitor, Integrated Pest Mgmt            | Monthly             | Vendor         |     |     | X   | X   | X   | X   | X   | X   | X   | X   |     |     |
| Irrigation System NONE                                    |                     |                |     |     |     |     |     |     |     |     |     |     |     |     |
| Heads, Controls - Check                                   | End/Start of Season | Staff          |     |     |     | X   |     |     |     |     |     | X   |     |     |
| Grounds                                                   |                     |                |     |     |     |     |     |     |     |     |     |     |     |     |
| Signage - Inspect                                         | Monthly             | Staff          | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   |
| Walks, Paving, Curbs - Cracks, broken curbs               | Monthly             | Staff          | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   |
| Parking Lot - Cracks, and Water Ponding                   | Bi-Annually         | Staff          |     |     | X   |     |     |     |     |     | X   |     |     |     |
| Fence - Holes, Falling over                               | Bi-Annually         | Staff          |     |     | X   |     |     |     |     |     | X   |     |     |     |
|                                                           |                     |                |     |     |     |     |     |     |     |     |     |     |     |     |
|                                                           |                     |                |     |     |     |     |     |     |     |     |     |     |     |     |
| Mechanical, Electrical Systems Inspections                |                     |                |     |     |     |     |     |     |     |     |     |     |     |     |
| HVAC (Heating, Ventilation, Air Conditioning)             |                     |                |     |     |     |     |     |     |     |     |     |     |     |     |
| FURNACE, AHU - Condenser clear of leaves and other debris | Bi-Annually         | Staff / Vendor |     |     |     | X   |     |     |     |     |     | X   |     |     |
| FCU, Window AC Filters - Inspect for season               | NONE                | Staff          |     |     |     | X   |     |     |     |     |     | X   |     |     |
| Air source Heat Pumps - Check Coil                        | NONE                | Staff          | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   |
| Co-Gen System - Inspect                                   | NONE                | Vendor         |     |     |     | X   |     |     |     |     |     | X   |     |     |
| Water system                                              |                     |                |     |     |     |     |     |     |     |     |     |     |     |     |
| Inspect - Valves, Pumps                                   | Bi-Annually         | Staff          |     |     |     |     | X   |     |     |     |     | X   |     |     |
| Test pressure                                             | Weekly              | Staff          | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   |
| Plumbing                                                  |                     |                |     |     |     |     |     |     |     |     |     |     |     |     |
| Toilets - Leaks                                           | Annually            | Staff          |     |     |     |     |     | X   |     |     |     |     |     |     |
| Faucets and shut-offs - Leaks                             | Annually            | Staff          |     |     |     |     |     | X   |     |     |     |     |     |     |
| Boilers/HW Tanks - Leaks                                  | Quarterly           | Staff          |     |     | X   |     |     | X   |     |     | X   |     |     | X   |
| Pumps - Operating                                         | Monthly             | Staff          | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   |
| Fire Sprinklers                                           |                     |                |     |     |     |     |     |     |     |     |     |     |     |     |
| Inspect, Test Backflow                                    | Annually            | Vendor         |     |     |     | X   |     |     |     |     |     |     |     |     |
| Sanitary system                                           |                     |                |     |     |     |     |     |     |     |     |     |     |     |     |
| Inspect - Valves, Pumps                                   | Bi-Annually         | Vendor         |     |     |     |     | X   |     |     |     |     | X   |     |     |
| Test system integrity                                     | Annually            | Staff / Vendor |     |     |     |     |     |     |     |     | X   |     |     |     |

PMR Component

| Storm drain system                                    |                        |                |                                                                                         |     |     |     |     |     |     |     |     |     |     |     |  |
|-------------------------------------------------------|------------------------|----------------|-----------------------------------------------------------------------------------------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|--|
| TASK                                                  | Frequency              | By             | Jan                                                                                     | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec |  |
| Inspect - Valves, Pumps                               | Bi-Annually            | Vendor         |                                                                                         |     |     | X   |     |     |     |     |     | X   |     |     |  |
| Test system integrity                                 | Annually               | Staff / Vendor |                                                                                         |     |     |     |     |     |     |     | X   |     |     |     |  |
| Electrical system                                     |                        |                |                                                                                         |     |     |     |     |     |     |     |     |     |     |     |  |
| Inspect connections in panels                         | As needed              | Vendor         | Recommended by DHCDs Handbook.<br>Perform during major work that includes panel changes |     |     |     |     |     |     |     |     |     |     |     |  |
| Fire Alarms                                           |                        |                |                                                                                         |     |     |     |     |     |     |     |     |     |     |     |  |
| System (Hardwired) - Inspect Common / Public Areas    | Bi-Annually            | Staff / Vendor |                                                                                         |     |     | X   |     |     |     |     |     | X   |     |     |  |
| System (Hardwired) - FA Panel for Trouble             | Annually               | Staff / Vendor |                                                                                         |     |     |     |     |     |     |     | X   |     |     |     |  |
| Fire Extinguishers - Check Gauge for Replacement need | Annually               | Vendor         |                                                                                         |     |     |     |     |     |     |     | X   |     |     |     |  |
| Generator NONE                                        |                        |                |                                                                                         |     |     |     |     |     |     |     |     |     |     |     |  |
| Test                                                  | Monthly                | Automatic      | X                                                                                       | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   |  |
| Emergency Lighting (Not on Generator)                 |                        |                |                                                                                         |     |     |     |     |     |     |     |     |     |     |     |  |
| Inspect and Test                                      | Monthly / Quarterly    | Staff          | X                                                                                       | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   |  |
| ALL Light Fixtures                                    |                        |                |                                                                                         |     |     |     |     |     |     |     |     |     |     |     |  |
| Lighting - Lights working                             | Monthly                | Staff          | X                                                                                       | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   |  |
| Security systems NONE                                 |                        |                |                                                                                         |     |     |     |     |     |     |     |     |     |     |     |  |
| System working                                        | Monthly                | Staff          | X                                                                                       | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   |  |
| Elevator system NONE                                  |                        |                |                                                                                         |     |     |     |     |     |     |     |     |     |     |     |  |
| Elevator Equipment                                    | Bi-Annually / Annually | Vendor         |                                                                                         |     |     | X   |     |     |     |     |     | X   |     |     |  |
| Test lights                                           | Monthly                | Staff / Vendor | X                                                                                       | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   |  |
| Solid waste disposal system NONE                      |                        |                |                                                                                         |     |     |     |     |     |     |     |     |     |     |     |  |
| Compactor machinery, trash Chute                      | Quarterly              | Staff          |                                                                                         |     | X   |     |     | X   |     |     | X   |     |     | X   |  |
|                                                       |                        |                |                                                                                         |     |     |     |     |     |     |     |     |     |     |     |  |
|                                                       |                        |                |                                                                                         |     |     |     |     |     |     |     |     |     |     |     |  |
|                                                       |                        |                |                                                                                         |     |     |     |     |     |     |     |     |     |     |     |  |
|                                                       |                        |                |                                                                                         |     |     |     |     |     |     |     |     |     |     |     |  |
|                                                       |                        |                |                                                                                         |     |     |     |     |     |     |     |     |     |     |     |  |
|                                                       |                        |                |                                                                                         |     |     |     |     |     |     |     |     |     |     |     |  |

P M R Component

| Machine Inspections             |                             |       |     |     |     |     |     |     |     |     |     |     |     |     |
|---------------------------------|-----------------------------|-------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|
| Automobile NONE                 |                             |       |     |     |     |     |     |     |     |     |     |     |     |     |
| TASK                            | Frequency                   | By    | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec |
| Check Oil                       | Weekly                      | Staff | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   |
| Check tires                     | Monthly                     | Staff | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   |
| Check Brakes                    | Weekly                      | Staff | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   | X   |
| Registration                    | Annually<br>(Varies)        | Staff |     |     |     |     |     |     |     |     |     |     |     |     |
| Small EnginesNONE               |                             |       |     |     |     |     |     |     |     |     |     |     |     |     |
| Check Oil Level                 | Every 5 Hrs                 | Staff |     |     | X   | X   | X   | X   | X   | X   |     |     |     |     |
| Check Fuel (in Tank and Stored) | After Use, Season End/Start | Staff |     | X   | X   | X   | X   | X   | X   | X   | X   |     |     |     |
| Inspect Machine / Equipment     | Before and after Use        | Staff |     |     | X   | X   | X   | X   | X   | X   |     |     |     |     |

**NOTE: Inspections will generate additional Routine (and Emergency) Work Orders.**

| Dwelling Unit Inspections Schedule and Checklist   |                        |                |              |     |     |     |     |     |     |     |     |     |     |     |
|----------------------------------------------------|------------------------|----------------|--------------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|
| LHA NAME:                                          |                        |                | DEVELOPMENT: |     |     |     |     |     |     |     |     |     |     |     |
| TASK                                               | Frequency              | By             | Jan          | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec |
| <b>Pine Tree Park</b>                              |                        |                |              |     |     |     |     |     |     |     |     |     |     |     |
| Apple 1 & 2                                        | Annually               | Staff          |              |     |     |     |     |     |     | *   |     |     |     |     |
| Birch                                              | Annually               | Staff          |              |     |     |     |     |     |     | *   |     |     |     |     |
| Cherry                                             | Annually               | Staff          |              |     |     |     |     |     |     | *   |     |     |     |     |
| Daisy                                              | Annually               | Staff          |              |     |     |     |     |     |     | *   |     |     |     |     |
| <b>Pine Tree Park</b>                              |                        |                |              |     |     |     |     |     |     |     |     |     |     |     |
| Elm 1 & 2                                          | Annually               | Staff          | *            |     |     |     |     |     |     |     |     |     |     |     |
| Fir 1 & 2                                          | Annually               | Staff          | *            |     |     |     |     |     |     |     |     |     |     |     |
| Goldfinch                                          | Annually               | Staff          | *            |     |     |     |     |     |     |     |     |     |     |     |
| Hawthorne 1 & 2                                    | Annually               | Staff          | *            |     |     |     |     |     |     |     |     |     |     |     |
| <b>Patriot Circle</b>                              |                        |                |              |     |     |     |     |     |     |     |     |     |     |     |
| Units A, B, C, D, E, F, G, H, K, L                 | Annually               | Staff          |              |     |     |     |     |     |     |     | *   |     |     |     |
| 143 & 145 King Street                              | Annually               | Staff          |              |     |     |     |     |     |     |     | *   |     |     |     |
| Units I & J                                        | Annually               | Staff & Vendor |              |     |     |     | *   |     |     |     |     |     |     |     |
| <b>Heat and smoke detectors</b>                    |                        |                |              |     |     |     |     |     |     |     |     |     |     |     |
| TASK                                               | Frequency              | By             | Jan          | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec |
| Battery Heat / Smoke Detectors - Inspect Condition | B Annually             | Staff          | *            |     |     |     | *   |     |     | *   | *   |     |     |     |
| Inspect System Heat detectors (in Units)           | Bi-Annually / Annually | Staff          | *            |     |     |     | *   |     |     | *   | *   |     |     |     |
| <b>Pest control</b>                                |                        |                |              |     |     |     |     |     |     |     |     |     |     |     |
| Inspect Unit                                       | Annually               | Staff          | *            |     |     |     | *   |     |     | *   | *   |     |     |     |
| <b>Floors, Ceilings, Walls</b>                     |                        |                |              |     |     |     |     |     |     |     |     |     |     |     |
| Floors (Wood, Vinyl, Tile)                         | Annually               | Staff          | *            |     |     |     | *   |     |     | *   | *   |     |     |     |
| <b>Kitchen fixtures</b>                            |                        |                |              |     |     |     |     |     |     |     |     |     |     |     |
| KITCHEN - Inspect Appliances                       | Annually               | Staff          | *            |     |     |     | *   |     |     | *   | *   |     |     |     |
| GAS STOVE - Inspect                                | NONE                   | Vendor         |              |     |     |     |     |     |     |     |     |     |     |     |
| Kitchen, Bath - Cabinets, fixtures                 | Annually               | Staff          | *            |     |     |     | *   |     |     | *   | *   |     |     |     |
| <b>HVAC fixtures</b>                               |                        |                |              |     |     |     |     |     |     |     |     |     |     |     |
| (Heat Pumps, Bath Fans, Forced Hot Air, Baseboard) | Annually               | Staff          | *            |     |     |     | *   |     |     | *   | *   |     |     |     |
| Fans, Baseboard, Vents - Inspect (dust, debris)    | Annually               | Staff          | *            |     |     |     | *   |     |     | *   | *   |     |     |     |



## **APPENDIX**

1. Development Information (5 Developments per Page)
2. Building Systems
3. Maintenance Policy

### **General Information**

- A. LHAs should use
  - i. Appendix 1 to document the various Developments at the LHA.
  - ii. Appendix 2 to document the Building Systems at the various Developments.

Appendix 1 and Appendix 2 will generate information that would be serve as input to the Maintenance Plan Schedule and Checklists.

- B. LHAs could use a 3-ring binder to
  - i. File the Appendix a and Appendix 2.
  - ii. File any information (Equipment information, Owner/User Manuals, copies of Warranties, etc) from completed projects.
  - iii. The 3-ring binder will contain pertinent information regarding building systems (Roofs, Mechanical, Electrical, Fire Alarm, etc) at the various developments.

## **APPENDIX 1**

### **DEVELOPMENT INFORMATION**

#### **Instructions**

Use this Appendix to document information on systems at the LHA's various Developments.

The Development Information sheet has space for five (5) developments (705, 667, 689) per page (3 pages are provided)

- LHAs with more than 15 developments, please print or copy a 4<sup>rd</sup> sheet and number the pages accordingly

A separate page is provided for Renovation Details and Unusual Features at the Developments.

Use the Check Boxes to provide the following details for each Development at the LHA.

#### **Using Appendix 1 – An Example**

- Brimfield HA has four (4) building; three (3) residential and one (1) Community Building.
- One Development Information sheet would be used.

For LHA Use (Input to PMR Component)

| Provide Development Details. Check Applicable Boxes |                |                                           |                                           |                                           |                                           |                                           |
|-----------------------------------------------------|----------------|-------------------------------------------|-------------------------------------------|-------------------------------------------|-------------------------------------------|-------------------------------------------|
| Development No. (667-1)                             |                | Pine Tree Park                            | <a href="#">Click here to enter text.</a> | <a href="#">Click here to enter text.</a> | <a href="#">Click here to enter text.</a> | <a href="#">Click here to enter text.</a> |
| Year Built                                          |                | 1970                                      | <a href="#">Click here to enter text.</a> | <a href="#">Click here to enter text.</a> | <a href="#">Click here to enter text.</a> | <a href="#">Click here to enter text.</a> |
| Development Name & Address                          |                | 19 Shattuck Street                        | <a href="#">Click here to enter text.</a> | <a href="#">Click here to enter text.</a> | <a href="#">Click here to enter text.</a> | <a href="#">Click here to enter text.</a> |
| Major Renovation (Year ONLY). For Details, Use Pa   |                | <a href="#">Click here to enter text.</a> | <a href="#">Click here to enter text.</a> | <a href="#">Click here to enter text.</a> | <a href="#">Click here to enter text.</a> | <a href="#">Click here to enter text.</a> |
| Check the Box if applicable                         |                | CHECK BOX                                 | CHECK BOX                                 | CHECK BOX                                 | CHECK BOX                                 | CHECK BOX                                 |
| No of Floors                                        | 1              | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |
|                                                     | 2 – 4          | <input checked="" type="checkbox"/>       | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |
|                                                     | 4 - 6          | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |
|                                                     | + 8            | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |
| No of Units                                         | 1              | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |
|                                                     | 2              | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |
|                                                     | 3              | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |
|                                                     | 4              | <input checked="" type="checkbox"/>       | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |
| Facilities                                          | Community Rm   | <input checked="" type="checkbox"/>       | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |
|                                                     | Laundry        | <input checked="" type="checkbox"/>       | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |
|                                                     | Main Office    | <input checked="" type="checkbox"/>       | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |
|                                                     | Reception      | <input checked="" type="checkbox"/>       | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |
| Storage                                             | Maintenance    | <input checked="" type="checkbox"/>       | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |
|                                                     | Garage         | <input checked="" type="checkbox"/>       | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |
|                                                     | Storage Shed   | <input checked="" type="checkbox"/>       | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |
|                                                     | Container      | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |
| Roof Systems                                        | Off-Site       | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |
|                                                     | Shingles       | <input checked="" type="checkbox"/>       | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |
|                                                     | EPDM           | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |
|                                                     | Metal          | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |
| Building Systems                                    | BUR            | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |
|                                                     | Elevator       | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |
|                                                     | Chair Lift     | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |
|                                                     | Generator      | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |
| Fire Safety Systems                                 | Access Control | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |
|                                                     | Fire Alarm     | <input checked="" type="checkbox"/>       | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |
|                                                     | Monitored      | <input checked="" type="checkbox"/>       | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |
|                                                     | Fire Pump      | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |
| Heat                                                | Sprinklers     | <input checked="" type="checkbox"/>       | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |
|                                                     | Gas            | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |
|                                                     | Propane        | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |
|                                                     | Co-Gen         | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |
| Hot Water                                           | Electric       | <input checked="" type="checkbox"/>       | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |
|                                                     | Gas            | <input checked="" type="checkbox"/>       | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |
|                                                     | Propane        | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |
|                                                     | Co-Gen         | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |
| Hot Water                                           | Electric       | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |
|                                                     | Gas            | <input checked="" type="checkbox"/>       | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |
|                                                     | Propane        | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |
|                                                     | Co-Gen         | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |

For LHA Use (Input to PMR Component)

| Provide Development Details. Check Applicable Boxes |                |                                           |                                           |                                           |                                           |                                           |
|-----------------------------------------------------|----------------|-------------------------------------------|-------------------------------------------|-------------------------------------------|-------------------------------------------|-------------------------------------------|
| Development No. 705                                 |                | Patriot Circle                            | <a href="#">Click here to enter text.</a> | <a href="#">Click here to enter text.</a> | <a href="#">Click here to enter text.</a> | <a href="#">Click here to enter text.</a> |
| Year Built                                          |                | 1990                                      | <a href="#">Click here to enter text.</a> | <a href="#">Click here to enter text.</a> | <a href="#">Click here to enter text.</a> | <a href="#">Click here to enter text.</a> |
| Development Name & Address                          |                | 19 Shattuck Street                        | <a href="#">Click here to enter text.</a> | <a href="#">Click here to enter text.</a> | <a href="#">Click here to enter text.</a> | <a href="#">Click here to enter text.</a> |
| Major Renovation (Year ONLY). For Details, Use Pa   |                | <a href="#">Click here to enter text.</a> | <a href="#">Click here to enter text.</a> | <a href="#">Click here to enter text.</a> | <a href="#">Click here to enter text.</a> | <a href="#">Click here to enter text.</a> |
| Check the Box if applicable                         |                | CHECK BOX                                 | CHECK BOX                                 | CHECK BOX                                 | CHECK BOX                                 | CHECK BOX                                 |
| No of Floors                                        | 1              | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |
|                                                     | 2 – 4          | <input checked="" type="checkbox"/>       | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |
|                                                     | 4 - 6          | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |
|                                                     | + 8            | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |
| No of Units                                         | 1              | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |
|                                                     | 2              | <input checked="" type="checkbox"/>       | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |
|                                                     | 3              | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |
|                                                     | 4              | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |
| Facilities                                          | Community Rm   | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |
|                                                     | Laundry        | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |
|                                                     | Main Office    | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |
|                                                     | Reception      | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |
| Storage                                             | Maintenance    | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |
|                                                     | Garage         | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |
|                                                     | Storage Shed   | <input checked="" type="checkbox"/>       | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |
|                                                     | Container      | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |
| Roof Systems                                        | Off-Site       | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |
|                                                     | Shingles       | <input checked="" type="checkbox"/>       | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |
|                                                     | EPDM           | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |
|                                                     | Metal          | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |
| Building Systems                                    | BUR            | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |
|                                                     | Elevator       | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |
|                                                     | Chair Lift     | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |
|                                                     | Generator      | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |
| Fire Safety Systems                                 | Access Control | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |
|                                                     | Fire Alarm     | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |
|                                                     | Monitored      | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |
|                                                     | Fire Pump      | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |
| Heat                                                | Sprinklers     | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |
|                                                     | Gas            | <input checked="" type="checkbox"/>       | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |
|                                                     | Propane        | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |
|                                                     | Co-Gen         | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |
| Hot Water                                           | Electric       | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |
|                                                     | Gas            | <input checked="" type="checkbox"/>       | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |
|                                                     | Propane        | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |
|                                                     | Co-Gen         | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |

For LHA Use (Input to PMR Component)

| Provide Development Details. Check Applicable Boxes |                |                                           |                                           |                                           |                                           |                                           |
|-----------------------------------------------------|----------------|-------------------------------------------|-------------------------------------------|-------------------------------------------|-------------------------------------------|-------------------------------------------|
| Development No. (667-1)                             |                | <a href="#">Click here to enter text.</a> | <a href="#">Click here to enter text.</a> | <a href="#">Click here to enter text.</a> | <a href="#">Click here to enter text.</a> | <a href="#">Click here to enter text.</a> |
| Year Built                                          |                | <a href="#">Click here to enter text.</a> | <a href="#">Click here to enter text.</a> | <a href="#">Click here to enter text.</a> | <a href="#">Click here to enter text.</a> | <a href="#">Click here to enter text.</a> |
| Development Name & Address                          |                | <a href="#">Click here to enter text.</a> | <a href="#">Click here to enter text.</a> | <a href="#">Click here to enter text.</a> | <a href="#">Click here to enter text.</a> | <a href="#">Click here to enter text.</a> |
| Major Renovation (Year ONLY). For Details, Use Pa   |                | <a href="#">Click here to enter text.</a> | <a href="#">Click here to enter text.</a> | <a href="#">Click here to enter text.</a> | <a href="#">Click here to enter text.</a> | <a href="#">Click here to enter text.</a> |
| Check the Box if applicable                         |                | CHECK BOX                                 | CHECK BOX                                 | CHECK BOX                                 | CHECK BOX                                 | CHECK BOX                                 |
| No of Floors                                        | 1              | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |
|                                                     | 2 – 4          | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |
|                                                     | 4 - 6          | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |
|                                                     | + 8            | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |
| No of Units                                         | 1              | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |
|                                                     | 2              | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |
|                                                     | 3              | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |
|                                                     | 4              | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |
| Facilities                                          | Community Rm   | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |
|                                                     | Laundry        | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |
|                                                     | Main Office    | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |
|                                                     | Reception      | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |
| Storage                                             | Maintenance    | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |
|                                                     | Garage         | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |
|                                                     | Storage Shed   | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |
|                                                     | Container      | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |
| Roof Systems                                        | Off-Site       | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |
|                                                     | Shingles       | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |
|                                                     | EPDM           | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |
|                                                     | Metal          | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |
| Building Systems                                    | BUR            | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |
|                                                     | Elevator       | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |
|                                                     | Chair Lift     | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |
|                                                     | Generator      | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |
| Fire Safety Systems                                 | Access Control | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |
|                                                     | Fire Alarm     | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |
|                                                     | Monitored      | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |
|                                                     | Fire Pump      | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |
| Heat                                                | Sprinklers     | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |
|                                                     | Gas            | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input checked="" type="checkbox"/>       |
|                                                     | Propane        | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |
|                                                     | Co-Gen         | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |
| Hot Water                                           | Electric       | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |
|                                                     | Gas            | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |
|                                                     | Propane        | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |
|                                                     | Co-Gen         | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |

For LHA Use (Input to PMR Component)

| Major Renovations                         |                                           |
|-------------------------------------------|-------------------------------------------|
| Year                                      | Details                                   |
| <a href="#">Click here to enter text.</a> | <a href="#">Click here to enter text.</a> |
| <a href="#">Click here to enter text.</a> | <a href="#">Click here to enter text.</a> |
| <a href="#">Click here to enter text.</a> | <a href="#">Click here to enter text.</a> |
| <a href="#">Click here to enter text.</a> | <a href="#">Click here to enter text.</a> |

| Unusual Development Features              |                                           |
|-------------------------------------------|-------------------------------------------|
| Development No and Address                | Details                                   |
| <a href="#">Click here to enter text.</a> | <a href="#">Click here to enter text.</a> |
| <a href="#">Click here to enter text.</a> | <a href="#">Click here to enter text.</a> |
| <a href="#">Click here to enter text.</a> | <a href="#">Click here to enter text.</a> |
| <a href="#">Click here to enter text.</a> | <a href="#">Click here to enter text.</a> |

## **APPENDIX 2**

### **BUILDING SYSTEMS**

#### **Instructions**

**This Appendix provides information on various building components (building systems) at the LHAs developments.**

**Equipment Serial and Model Numbers could be collected when new equipment is installed.**

**The information could be filed in a 3-ring binder.**

## A.1 HEATING SYSTEMS

| <b>A-1 Electric Heat</b>  |                              |                             |                                                            |                             |                              |                             |
|---------------------------|------------------------------|-----------------------------|------------------------------------------------------------|-----------------------------|------------------------------|-----------------------------|
| Heating System            | Baseboard                    |                             | Wall Heater                                                |                             | Heat Pumps                   |                             |
| 1 Unit per 1 Apartment    | Yes <input type="checkbox"/> | No <input type="checkbox"/> | Yes <input type="checkbox"/>                               | No <input type="checkbox"/> | Yes <input type="checkbox"/> | No <input type="checkbox"/> |
| 1 Unit per Building       | Yes <input type="checkbox"/> | No <input type="checkbox"/> | Yes <input type="checkbox"/>                               | No <input type="checkbox"/> | Yes <input type="checkbox"/> | No <input type="checkbox"/> |
| Serviced by:              | Serviced by (Phone #):       |                             | On-Call Contract                                           |                             |                              |                             |
|                           |                              |                             | Yes: <input type="checkbox"/> No: <input type="checkbox"/> |                             |                              |                             |
|                           |                              |                             | Yes: <input type="checkbox"/> No: <input type="checkbox"/> |                             |                              |                             |
| <b>A-2 Oil / Gas Heat</b> |                              |                             |                                                            |                             |                              |                             |
| Heating System            | Oil-Fired                    |                             | Gas-Fired                                                  |                             |                              |                             |
| Heating System            | <input type="checkbox"/>     |                             | <input type="checkbox"/>                                   |                             |                              |                             |
| 1 Unit per 1 Apartment    | Yes <input type="checkbox"/> |                             | No <input type="checkbox"/>                                |                             |                              |                             |
| 1 Unit per Building       | Yes <input type="checkbox"/> |                             | No <input type="checkbox"/>                                |                             |                              |                             |
| Serviced by:              | Serviced by (Phone #):       |                             | On-Call Contract                                           |                             |                              |                             |
|                           |                              |                             | Yes: <input type="checkbox"/> No: <input type="checkbox"/> |                             |                              |                             |
|                           |                              |                             | Yes: <input type="checkbox"/> No: <input type="checkbox"/> |                             |                              |                             |

| <b>A-3 Cogeneration and Geothermal</b> |                              |                                                            |
|----------------------------------------|------------------------------|------------------------------------------------------------|
| Heating System                         | Oil-Fired                    | Gas-Fired                                                  |
| Heating System                         | <input type="checkbox"/>     | <input type="checkbox"/>                                   |
| 1 Unit per 1 Apartment                 | Yes <input type="checkbox"/> | No <input type="checkbox"/>                                |
| 1 Unit per Building                    | Yes <input type="checkbox"/> | No <input type="checkbox"/>                                |
| Serviced by:                           | Serviced by (Phone #):       | On-Call Contract                                           |
|                                        |                              | Yes: <input type="checkbox"/> No: <input type="checkbox"/> |
|                                        |                              | Yes: <input type="checkbox"/> No: <input type="checkbox"/> |



## A.2 HEATING EQUIPMENT INFORMATION

|                          | Serial #                                  | Model #                                   |
|--------------------------|-------------------------------------------|-------------------------------------------|
| <b>Electric Heating</b>  | <a href="#">Click here to enter text.</a> | <a href="#">Click here to enter text.</a> |
|                          | <a href="#">Click here to enter text.</a> | <a href="#">Click here to enter text.</a> |
|                          | <a href="#">Click here to enter text.</a> | <a href="#">Click here to enter text.</a> |
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|                          | <a href="#">Click here to enter text.</a> | <a href="#">Click here to enter text.</a> |
|                          | <a href="#">Click here to enter text.</a> | <a href="#">Click here to enter text.</a> |
| <b>Oil / Gas Heating</b> | <a href="#">Click here to enter text.</a> | <a href="#">Click here to enter text.</a> |
|                          | <a href="#">Click here to enter text.</a> | <a href="#">Click here to enter text.</a> |
|                          | <a href="#">Click here to enter text.</a> | <a href="#">Click here to enter text.</a> |
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|                          | <a href="#">Click here to enter text.</a> | <a href="#">Click here to enter text.</a> |

## A.3 HEATING EQUIPMENT INFORMATION

|                                           | Serial #                                  | Model #                                   |
|-------------------------------------------|-------------------------------------------|-------------------------------------------|
| <b>Co-Gen Heating</b>                     | <a href="#">Click here to enter text.</a> | <a href="#">Click here to enter text.</a> |
|                                           | <a href="#">Click here to enter text.</a> | <a href="#">Click here to enter text.</a> |
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|                                           | <a href="#">Click here to enter text.</a> | <a href="#">Click here to enter text.</a> |
|                                           | <b>Other:</b> _____<br>_____              | <a href="#">Click here to enter text.</a> |
| <a href="#">Click here to enter text.</a> |                                           | <a href="#">Click here to enter text.</a> |
| <a href="#">Click here to enter text.</a> |                                           | <a href="#">Click here to enter text.</a> |
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| <a href="#">Click here to enter text.</a> |                                           | <a href="#">Click here to enter text.</a> |
| <a href="#">Click here to enter text.</a> |                                           | <a href="#">Click here to enter text.</a> |

### A. HOT WATER SYSTEMS

|                        | Electric                                  | Oil                                                        | Gas                      |
|------------------------|-------------------------------------------|------------------------------------------------------------|--------------------------|
| Hot Water              | <input type="checkbox"/>                  | <input type="checkbox"/>                                   | <input type="checkbox"/> |
| 1 Unit per 1 Apartment | Yes <input type="checkbox"/>              | No <input type="checkbox"/>                                |                          |
| 1 Unit per Building    | Yes <input type="checkbox"/>              | No <input type="checkbox"/>                                |                          |
| LHA-Owned / Rented     | Rented <input type="checkbox"/>           | LHA-Owned <input type="checkbox"/>                         |                          |
| Name of Rental Company | <a href="#">Click here to enter text.</a> | <a href="#">Click here to enter text.</a>                  |                          |
| Serviced by:           | Serviced by (Phone #):                    | On-Call Contract                                           |                          |
|                        |                                           | Yes: <input type="checkbox"/> No: <input type="checkbox"/> |                          |
|                        |                                           | Yes: <input type="checkbox"/> No: <input type="checkbox"/> |                          |

## B.2 HOT WATER EQUIPMENT INFORMATION

|                  | Serial #                                  | Model #                                   |
|------------------|-------------------------------------------|-------------------------------------------|
| <b>Electric</b>  | <a href="#">Click here to enter text.</a> | <a href="#">Click here to enter text.</a> |
|                  | <a href="#">Click here to enter text.</a> | <a href="#">Click here to enter text.</a> |
|                  | <a href="#">Click here to enter text.</a> | <a href="#">Click here to enter text.</a> |
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|                  | <a href="#">Click here to enter text.</a> | <a href="#">Click here to enter text.</a> |
| <b>Oil / Gas</b> | <a href="#">Click here to enter text.</a> | <a href="#">Click here to enter text.</a> |
|                  | <a href="#">Click here to enter text.</a> | <a href="#">Click here to enter text.</a> |
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|                  | <a href="#">Click here to enter text.</a> | <a href="#">Click here to enter text.</a> |

### C.1 PUMPS

| Check Box if Pumps are in Place; Leave unchecked if no pumps are in Place |                                           |                                           |
|---------------------------------------------------------------------------|-------------------------------------------|-------------------------------------------|
| <b>Pumps:</b>                                                             | <b>Drinking Water</b>                     | <b>Sump</b>                               |
| If YES, Check                                                             | <input type="checkbox"/>                  | <input type="checkbox"/>                  |
| Number of Pumps                                                           | <a href="#">Click here to enter text.</a> | <a href="#">Click here to enter text.</a> |
|                                                                           |                                           |                                           |
| <b>Flood Control:</b>                                                     | <b>Basement Flood</b>                     | <b>Area Flood</b>                         |
| If YES, Check                                                             | <input type="checkbox"/>                  | <input type="checkbox"/>                  |
| Number of Pumps                                                           | <a href="#">Click here to enter text.</a> | <a href="#">Click here to enter text.</a> |
|                                                                           |                                           |                                           |
| <b>Other:</b>                                                             | <b>Elevator Pit:</b>                      |                                           |
| If YES, Check                                                             | <input type="checkbox"/>                  |                                           |
| Number of Pumps                                                           | <a href="#">Click here to enter text.</a> |                                           |

## C.2 PUMP EQUIPMENT INFORMATION

|  | Serial #                                  | Model #                                   |
|--|-------------------------------------------|-------------------------------------------|
|  | <a href="#">Click here to enter text.</a> | <a href="#">Click here to enter text.</a> |
|  | <a href="#">Click here to enter text.</a> | <a href="#">Click here to enter text.</a> |
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|  | <a href="#">Click here to enter text.</a> | <a href="#">Click here to enter text.</a> |

**D. ROOF SYSTEMS (If more ha 8 Developments, copy this page)**

|                                                              |                                                            |                              |                                                      |                              |                              |                              |
|--------------------------------------------------------------|------------------------------------------------------------|------------------------------|------------------------------------------------------|------------------------------|------------------------------|------------------------------|
| <b>DEV #:</b> <a href="#">Click here to enter text.</a>      | <b>Install Date</b>                                        | <b>Warranty</b>              | <b>Shingle</b>                                       | <b>EPDM</b>                  | <b>Metal</b>                 | <b>BUR</b>                   |
| <b>Address:</b><br><a href="#">Click here to enter text.</a> |                                                            | Yes <input type="checkbox"/> | Yes <input type="checkbox"/>                         | Yes <input type="checkbox"/> | Yes <input type="checkbox"/> | Yes <input type="checkbox"/> |
| <b>DEV #:</b> <a href="#">Click here to enter text.</a>      | <b>Install Date</b>                                        | <b>Warranty</b>              | <b>Shingle</b>                                       | <b>EPDM</b>                  | <b>Metal</b>                 | <b>BUR</b>                   |
| <b>Address:</b><br><a href="#">Click here to enter text.</a> |                                                            | Yes <input type="checkbox"/> | Yes <input type="checkbox"/>                         | Yes <input type="checkbox"/> | Yes <input type="checkbox"/> | Yes <input type="checkbox"/> |
| <b>DEV #:</b> <a href="#">Click here to enter text.</a>      | <b>Install Date</b>                                        | <b>Warranty</b>              | <b>Shingle</b>                                       | <b>EPDM</b>                  | <b>Metal</b>                 | <b>BUR</b>                   |
| <b>Address:</b><br><a href="#">Click here to enter text.</a> |                                                            | Yes <input type="checkbox"/> | Yes <input type="checkbox"/>                         | Yes <input type="checkbox"/> | Yes <input type="checkbox"/> | Yes <input type="checkbox"/> |
| <b>DEV #:</b> <a href="#">Click here to enter text.</a>      | <b>Install Date</b>                                        | <b>Warranty</b>              | <b>Shingle</b>                                       | <b>EPDM</b>                  | <b>Metal</b>                 | <b>BUR</b>                   |
| <b>Address:</b><br><a href="#">Click here to enter text.</a> |                                                            | Yes <input type="checkbox"/> | Yes <input type="checkbox"/>                         | Yes <input type="checkbox"/> | Yes <input type="checkbox"/> | Yes <input type="checkbox"/> |
| <b>DEV #:</b> <a href="#">Click here to enter text.</a>      | <b>Install Date</b>                                        | <b>Warranty</b>              | <b>Shingle</b>                                       | <b>EPDM</b>                  | <b>Metal</b>                 | <b>BUR</b>                   |
| <b>Address:</b><br><a href="#">Click here to enter text.</a> |                                                            | Yes <input type="checkbox"/> | Yes <input type="checkbox"/>                         | Yes <input type="checkbox"/> | Yes <input type="checkbox"/> | Yes <input type="checkbox"/> |
| <b>DEV #:</b> <a href="#">Click here to enter text.</a>      | <b>Install Date</b>                                        | <b>Warranty</b>              | <b>Shingle</b>                                       | <b>EPDM</b>                  | <b>Metal</b>                 | <b>BUR</b>                   |
| <b>Address:</b><br><a href="#">Click here to enter text.</a> |                                                            | Yes <input type="checkbox"/> | Yes <input type="checkbox"/>                         | Yes <input type="checkbox"/> | Yes <input type="checkbox"/> | Yes <input type="checkbox"/> |
| <b>DEV #:</b> <a href="#">Click here to enter text.</a>      | <b>Install Date</b>                                        | <b>Warranty</b>              | <b>Shingle</b>                                       | <b>EPDM</b>                  | <b>Metal</b>                 | <b>BUR</b>                   |
| <b>Address:</b><br><a href="#">Click here to enter text.</a> |                                                            | Yes <input type="checkbox"/> | Yes <input type="checkbox"/>                         | Yes <input type="checkbox"/> | Yes <input type="checkbox"/> | Yes <input type="checkbox"/> |
|                                                              |                                                            |                              |                                                      |                              |                              |                              |
| <b>Annual Inspection</b>                                     | Yes: <input type="checkbox"/> No: <input type="checkbox"/> |                              | <b>By:</b> <a href="#">Click here to enter text.</a> |                              |                              |                              |

#### E. FIRE PROTECTION (SPRINKLER AND FIRE ALARM SYSTEMS)

|                                                                             |                                           |                              |                                                         |                                           |
|-----------------------------------------------------------------------------|-------------------------------------------|------------------------------|---------------------------------------------------------|-------------------------------------------|
| <b>Fire Alarm System:</b>                                                   | <b>Non-Addressable</b>                    | <b>Addressable Monitored</b> | <b>Phone</b>                                            | <b>Cell</b>                               |
| If YES, Check Box                                                           | <input type="checkbox"/>                  | <input type="checkbox"/>     | <input type="checkbox"/>                                | <input type="checkbox"/>                  |
| System Name                                                                 | <a href="#">Click here to enter text.</a> |                              | Install Date: <a href="#">Click here to enter text.</a> |                                           |
| FD Radio Connection                                                         | <a href="#">Click here to enter text.</a> |                              | Last Test: <a href="#">Click here to enter text.</a>    |                                           |
| Under Warranty?                                                             | Yes: <input type="checkbox"/>             |                              | No: <input type="checkbox"/>                            |                                           |
| Service Company                                                             | <a href="#">Click here to enter text.</a> |                              |                                                         |                                           |
| <b>Sprinkler System:</b>                                                    | <b>Wet</b>                                | <b>Dry</b>                   | <b>Fire Pump</b>                                        | <b>Install Date</b>                       |
| If YES, Check Box                                                           | <input type="checkbox"/>                  | <input type="checkbox"/>     | <input type="checkbox"/>                                | <a href="#">Click here to enter text.</a> |
| Date of Last Test                                                           | <a href="#">Click here to enter text.</a> |                              | <a href="#">Click here to enter text.</a>               |                                           |
| Under Warranty?                                                             | Yes: <input type="checkbox"/>             |                              | No: <input type="checkbox"/>                            |                                           |
| Service Company                                                             | <a href="#">Click here to enter text.</a> |                              | <a href="#">Click here to enter text.</a>               |                                           |
| Annual Inspections by: Include Phone Number<br>(Attach copy of the Report): | <a href="#">Click here to enter text.</a> |                              |                                                         |                                           |

#### F. EMERGENCY / STANDBY POWER SYSTEMS

|                                   |                                           |                          |                                           |                                           |
|-----------------------------------|-------------------------------------------|--------------------------|-------------------------------------------|-------------------------------------------|
| <b>Generator</b>                  | <b>Diesel</b>                             | <b>Gas</b>               | <b>Size (kW)</b>                          | <b>Install Date</b>                       |
| If YES, Check Box                 | <input type="checkbox"/>                  | <input type="checkbox"/> | <a href="#">Click here to enter text.</a> | <a href="#">Click here to enter text.</a> |
| Engine                            | <a href="#">Click here to enter text.</a> |                          |                                           |                                           |
| Generator located                 | <b>Inside Building</b>                    | <b>Outside Building</b>  | <b>Containment Area (If Diesel)</b>       |                                           |
|                                   | <input type="checkbox"/>                  | <input type="checkbox"/> | <input type="checkbox"/>                  |                                           |
| Brand Name                        | <a href="#">Click here to enter text.</a> |                          |                                           |                                           |
| Serviced by: Include Phone Number | <a href="#">Click here to enter text.</a> |                          |                                           |                                           |

## G. ELEVATORS / CHAIR LIFTS

| Elevator:                                         |           | Elevator #1                                                                                                                         | Elevator #2                               | Elevator #3                               | Elevator #4                               |
|---------------------------------------------------|-----------|-------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------|-------------------------------------------|-------------------------------------------|
| If YES, Check Box                                 |           | <input type="checkbox"/>                                                                                                            | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |
| Type                                              | Hydraulic | <input type="checkbox"/>                                                                                                            | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |
|                                                   | Traction  | <input type="checkbox"/>                                                                                                            | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |
| Brand Name                                        |           | <a href="#">Click here to enter text.</a><br><a href="#">Click here to enter text.</a><br><a href="#">Click here to enter text.</a> |                                           |                                           |                                           |
| Year Installed:                                   |           | <a href="#">Click here to enter text.</a>                                                                                           | <a href="#">Click here to enter text.</a> | <a href="#">Click here to enter text.</a> | <a href="#">Click here to enter text.</a> |
| Serviced / Maintained by:<br>Include Phone Number |           | <a href="#">Click here to enter text.</a><br><a href="#">Click here to enter text.</a><br><a href="#">Click here to enter text.</a> |                                           |                                           |                                           |

| Chair Lift:                          |            | Chair Lift #1                             | Chair Lift #2                             | Chair Lift #3                             | Chair Lift #4                             |
|--------------------------------------|------------|-------------------------------------------|-------------------------------------------|-------------------------------------------|-------------------------------------------|
| If YES, Check Box                    |            | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |
| Type                                 | Hydraulic  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |
|                                      | Electrical | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  | <input type="checkbox"/>                  |
| Brand Name                           |            | <a href="#">Click here to enter text.</a> |                                           | <a href="#">Click here to enter text.</a> |                                           |
| Year Installed:                      |            | <a href="#">Click here to enter text.</a> | <a href="#">Click here to enter text.</a> | <a href="#">Click here to enter text.</a> | <a href="#">Click here to enter text.</a> |
| Serviced by:<br>Include Phone Number |            | <a href="#">Click here to enter text.</a> |                                           |                                           |                                           |



For LHA Use (Input to PMR Component)

#### H. GFCI, ARC FAULT PROTECTION, ELECTRIC PANELS

|                             |                              |                              |                                                 |                              |
|-----------------------------|------------------------------|------------------------------|-------------------------------------------------|------------------------------|
| <b>GFCI</b>                 | Kitchen                      | Bathroom                     | Kitchen                                         | Other                        |
|                             | Yes <input type="checkbox"/> | Yes <input type="checkbox"/> | Yes <input type="checkbox"/>                    | Yes <input type="checkbox"/> |
| Tamper-Resistant            | Yes <input type="checkbox"/> |                              | No <input type="checkbox"/>                     |                              |
| <b>Arc Fault Protection</b> | Bedrooms                     | Kitchen                      | Bedroom 3                                       | Bedroom 4                    |
|                             | Yes <input type="checkbox"/> | Yes <input type="checkbox"/> | Yes <input type="checkbox"/>                    | Yes <input type="checkbox"/> |
| Tamper-Resistant            | Yes <input type="checkbox"/> |                              | No <input type="checkbox"/>                     |                              |
| <b>Electric Panels</b>      | Federal Pacific              |                              | In Closet                                       |                              |
|                             | Yes <input type="checkbox"/> | No <input type="checkbox"/>  | Yes <input type="checkbox"/>                    | No <input type="checkbox"/>  |
| Amps                        | 60 <input type="checkbox"/>  | 100 <input type="checkbox"/> | Other <a href="#">Click here to enter text.</a> |                              |

#### I. EXTERIOR AND COMMON LIGHTING

|                                           |                          |                          |                          |                          |
|-------------------------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| <b>Lighting:</b>                          | Exterior<br>(Wall mount) | Exterior<br>(Pole Mount) | Entry Ways               | Hallways                 |
| LED (Arrays)                              | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| LED (Medium Base)                         | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Incandescent                              | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Halogen                                   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| HPS / LPS                                 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <a href="#">Click here to enter text.</a> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

For LHA Use

**APPENDIX 2**  
**MAINTENANCE POLICY**  
***Sample***

**INSTRUCTIONS**

The Attached document (WORD) could be used by LHA as a Maintenance Policy document.

## Maintenance Plan (Program and Policy)

### 1. Introduction

This document outlines the YOUR Housing Authority's (YHA) maintenance program and procedures.

#### Description of YHA Developments (1 paragraph per development)

*Located off of Church Street, 667-2 this development has 44 one-bedroom apartments. These units are in 11 one-story buildings with each apartment having a front and back door opening directly to the outside. This site also includes a stand-alone community building, with laundry facilities, public bathrooms and a small kitchen. There is also a free-standing maintenance shed.*

### 2. Staffing

This site has 2 PT maintenance staff.

### 3. Tracking of Maintenance Work (How do you track your Work Orders)

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

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

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

### 4. Routine Maintenance

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

#### a) Interior of the Community Building

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

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

**b) Exterior**

On a daily basis, the Maintenance Supervisor should inspect the sites walkways and parking areas. As necessary, these areas should be broom cleaned and free of any visible trash or tripping hazards. The lawns will be mowed as necessary to keep the grass height below 3 inches. In the spring and fall all grass area should be thoroughly raked and cleaned to remove the accumulation of dead grass, leaves and other debris. The plantings around the site should be kept neatly trimmed and free of trash and debris.

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

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

**5) Annual Unit Inspections**

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

**6) Preventive Maintenance**

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

**a) Fire Protection**

An outside firm under contract to the Authority maintains the building's fire protection system. This firm will test the operation of the system on a semi-annual basis in accordance with the guidelines provided by the National Fire Protections Association. If

any maintenance person detects a problem with the system, typically limited to hearing the audible trouble alarm, they should immediately contact the Authority's alarm contractor.

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

**b) Roof**

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

**c) Exterior Masonry**

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

**d) Space Heating**

The heat at Colonial Drive is provided by a heat pump system. The heat at Lake Terrace is forced hot water system. There are 4 boilers serving the Lake Terrace. Prior to the start of each heating season, the boilers will be serviced by an outside contractor to make certain they are in proper working condition. The heating pump systems at Colonial Drive filters will be cleaned 2x yearly by Maintenance staff. During unit inspections and the inspection of the common areas, the building maintenance person should make certain the heating elements and thermostats in all units are operating correctly. On a daily basis, during the heating season, a maintenance staff member should conduct a visual inspection of these YHA mechanical areas to spot any obvious leaks and to detect any abnormal sounds in the circulator motors associated with this system. At Sutton Street heat is provided by propane. During unit inspections and the inspection of the common areas, the building maintenance person should make certain the heating elements and thermostats in all units are operating correctly

**e) Domestic Hot Water**

At Lake Terrace the domestic hot water is heated by natural gas in one boiler room, per building. On a daily basis, a maintenance person should conduct a visual inspection of this YHA mechanical area to spot any obvious leaks and to detect any abnormal sounds in the circulator motors associated with this system. On an annual basis, the boilers should be inspected by the authority's HVAC contractor to make certain the equipment is operating within the appropriate operating parameters. At Colonial Drive, the domestic hot water is provided by electric hot water heaters, on a daily basis, a maintenance person should conduct a visual inspection of this YHA mechanical area to spot any obvious leaks and to detect any abnormal sounds in the circulator motors associated with this system. On an annual basis, the boilers should be inspected by the authority's HVAC contractor to make certain the equipment is operating within the appropriate operating parameters. At Sutton Street, the domestic hot water is provided by boiler. On an annual basis, the boilers should be inspected by the authority's contractor to make certain the equipment is operating within the appropriate operating parameters.

**f) Plumbing & Electrical Repairs**

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

**g) Extermination/Pest Control**

Because of liability issues, the authority no longer performs any of its own pest control services. This includes spraying for bees, hornets, wasps or any other flying insects. All resident complaints concerning cockroaches, flying insects, mice or other pests are handled by the authority's pest control contractor.

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

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

**7) Vacancy Turnaround**

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

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

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

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

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

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

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

#### **8) Maintenance Charges**

The Authority does not use a Schedule of Standard Maintenance charges to assess a resident for maintenance related work. When maintenance repairs are determined to be required because of resident/guest abuse or misuse, the resident is charged the actual Authority costs to make the repair. The charges will vary due to the amount of time of the repair (regular or after hours), the hourly rate of the person making the repairs and the materials involved. The maintenance person who completed the work will indicate whether they feel an item should be a resident charge on the work order. A copy of this work order will be forwarded to the administrative office for a final calculation of charge for the repair.

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

#### **9) Definition of Maintenance Emergencies**

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

The Authority considers the following items maintenance emergencies: gas leak, exposed electrical wires, broken water lines. Broken/clogged sewer lines, major roof or other building envelope leaks, security lock failure (unit or building), no electricity/heat, inoperable refrigerator (YHA owned), fire and any other natural disasters. All emergency items will be repaired or stabilized within 24 hours.

## DEFERRED MAINTENANCE LOG

| DATE OF ORIGINAL WORK ORDER | UNIT              | DESCRIPTION                    | REASON                     | DATE COMPLETED                     |
|-----------------------------|-------------------|--------------------------------|----------------------------|------------------------------------|
|                             |                   |                                |                            |                                    |
|                             |                   |                                |                            |                                    |
| 1/12/2014                   | 19L               | back patio repair              | broken                     | applying for vacant unit funds     |
| 1/12/2014                   | 19K               | Sub floor repair               | broken                     |                                    |
| 3/21/2016                   | 18                | ADA Cabinet Upgrades           | Not compliant              | 8/7/2018                           |
| 3/21/2016                   | 18                | Back door ramp                 | Not compliant              |                                    |
| 18-May-17                   | 19H               | Replace back screen door       | broken                     | 6/18/2018                          |
| 18-May-17                   | 19A               | Replace front screen door      | broken                     | 6/18/2018                          |
| 5/18/2017                   | 19G               | Replace front screen door      | broken                     | 6/18/2018                          |
| 18-May-17                   | All 667 buildings | general cleaning common areas  | dirty                      | ongoing                            |
| 18-May-17                   | All 667 buildings | touch up painting common areas | scratches and dings        | ongoing                            |
| 6/27/2017                   | 19G               | rugs                           | moisture                   | No moisture - monitoring           |
| 11/20/2017                  | 19K               | Bay window replacement         | rotted                     |                                    |
| Winter 2018                 | Grounds           | tree trimming                  | broken branches            | 4/10/2018                          |
| 4/20/2018                   | 19H               | shed door replacement          | broken                     | vacant unit turnover funds awarded |
| 5/18/2018                   | 19K               | downstairs bath vanity         | beyond its useful life     | 2/6/2019                           |
| 6/19/2018                   | 19H               | kitchen cabinets               | broken                     | vacant unit turnover funds awarded |
| 7/24/2018                   | 1                 | ceiling repair                 | leak from upstairs         | 7/1/2019                           |
| 8/16/2018                   | 19I & 19J         | tree trimming                  | leaning on houses and shed | 5/3/2021                           |
| 2/12/2019                   | Daisy Building    | sidewalk repair                | walkway in front floods    | RCAT Project Completed             |
| 8/22/2018                   | 19H               | Bay window replacement         | Leaks                      | vacant unit turnover funds awarded |
| 7/15/2019                   | Fir 31            | ceiling repair                 | see work order 2838        | 11/22/2021                         |
| 6/19/2019                   | 19I               | tile floor repair              | see work order 2802        | vacant unit turnover funds awarded |
| 7/23/2019                   | 19L               | living room screens            | see work order 2892        | applying for vacant unit funds     |
| 7/23/2019                   | 19L               | holes in living room walls     | see work order 2891        | applying for vacant unit funds     |
| 7/23/2019                   | 19L               | living room carpet             | see work order 2890        | applying for vacant unit funds     |
| 7/23/2019                   | 19L               | holes in laundry room walls    | see work order 2889        | applying for vacant unit funds     |
| 7/23/2019                   | 19L               | kitchen window screens         | see work order 2888        | applying for vacant unit funds     |
| 7/23/2019                   | 19L               | refrigerator                   | see work order 2887        | applying for vacant unit funds     |
| 7/23/2019                   | 19L               | kitchen cabinets               | see work order 2884        | applying for vacant unit funds     |
| 7/23/2019                   | 19L               | hallway/stairwell screens      | see work order 2883        | applying for vacant unit funds     |
| 7/23/2019                   | 19L               | hallway/stairwell holes        | see work order 2881        | applying for vacant unit funds     |
| 7/23/2019                   | 19L               | diningroom walls               | see work order 2877        | applying for vacant unit funds     |
| 7/23/2019                   | 19L               | diningroom ceiling             | see work order 2876        | applying for vacant unit funds     |
| 7/23/2019                   | 19L               | bedroom 3 screens              | see work order 2874        | applying for vacant unit funds     |
| 7/23/2019                   | 19L               | bedroom 3 interior door        | see work order 2873        | applying for vacant unit funds     |
| 7/23/2019                   | 19L               | bedroom 2 screens              | see work order 2872        | applying for vacant unit funds     |
| 7/23/2019                   | 19L               | bedroom 2 carpet               | see work order 2871        | applying for vacant unit funds     |
| 7/23/2019                   | 19L               | bedroom 2 interior door        | see work order 2870        | applying for vacant unit funds     |



|            |                 |                                |                     |                                    |
|------------|-----------------|--------------------------------|---------------------|------------------------------------|
| 7/23/2019  | 19L             | bedroom 2 closet               | see work order 2869 | applying for vacant unit funds     |
| 7/23/2019  | 19L             | bedroom 1 screens              | see work order 2868 | applying for vacant unit funds     |
| 7/23/2019  | 19L             | Bedroom 1 interior door        | see work order 2867 | applying for vacant unit funds     |
| 7/23/2019  | 19L             | bathroom 2 screens             | see work order 2866 | applying for vacant unit funds     |
| 7/23/2019  | 19L             | bathroom 2 walls               | see work order 2865 | applying for vacant unit funds     |
| 7/23/2019  | 19L             | bathroom 2 toilet              | see work order 2864 | applying for vacant unit funds     |
| 7/23/2019  | 19L             | bathroom 2 floor               | see work order 2860 | applying for vacant unit funds     |
| 7/23/2019  | 19L             | bathroom 2 door                | see work order 2859 | applying for vacant unit funds     |
| 7/23/2019  | 19L             | bathroom 2 toilet paper holder | see work order 2858 | applying for vacant unit funds     |
| 7/23/2019  | 19L             | bathroom 1 walls               | see work order 2857 | applying for vacant unit funds     |
| 7/23/2019  | 19L             | bathroom 1 vanity              | see work order 2854 | applying for vacant unit funds     |
| 7/23/2019  | 19L             | grounds                        | see work order 2846 | applying for vacant unit funds     |
| 7/31/2019  | 19I             | entrance floor tiles           | see work order 2912 | vacant unit turnover funds awarded |
| 2/3/2020   | 19D             | blinds                         | see work order 3169 |                                    |
| 2/3/2020   | 19D             | water damage                   | see work order 3170 | 1/6/2021                           |
| 2/5/2020   | 19E             | ceiling stain                  | see work order 3175 |                                    |
| 2/5/2020   | 19E             | Blinds                         | see work order 3177 |                                    |
| 2/26/2020  | 19 Shattuck #11 | appliances                     | see work order 3269 |                                    |
| 3/11/2020  | 19 Shattuck #24 | painting                       | see work order 3313 |                                    |
| 3/11/2020  | 19 Shattuck #24 | ceiling                        | see work order 3312 |                                    |
| 3/16/2020  | 19 Shattuck #40 | rugs                           | see work order 3334 |                                    |
| 9/23/2020  | 19 Shattuck #46 | Ceiling                        | see work order 3444 | 6/1/2022                           |
| 12/10/2020 | 19C             | Outside spigot                 | see work order 3507 |                                    |
| 1/25/2021  | 19 Shattuck #35 | shades                         | see work order 3559 | 4/23/2021                          |
| 11/3/2021  | 19A             | window replacement             | window rotted       | window rotted                      |

[illegible]

**Operating Budget**

The tables on the following pages show the approved budget and actual income and spending per budget account (row) for the fiscal year ending 03/31/2022. It also shows the approved budget for the current year (2023) 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 Littleton Housing Authority operating reserve at the end of fiscal year 2022 was \$23,145.00, which is 11.6% 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 Littleton Housing Authority. |                                            |                              |                              |                              |                                          |                                          |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------|------------------------------|------------------------------|------------------------------|------------------------------------------|------------------------------------------|
| <b>REVENUE</b>                                                                                                                                                  |                                            |                              |                              |                              |                                          |                                          |
| Account Number                                                                                                                                                  | Account Class                              | 2022 Approved Revenue Budget | 2022 Actual Amounts Received | 2023 Approved Revenue Budget | % Change from 2022 Actual to 2023 Budget | 2023 Dollars Budgeted per Unit per Month |
| 3110                                                                                                                                                            | Shelter Rent - Tenants                     | \$288,000.00                 | \$286,197.00                 | \$296,316.00                 | 3.5%                                     | \$411.55                                 |
| 3111                                                                                                                                                            | Shelter Rent - Tenants - Fraud/Retroactive | \$0.00                       | \$0.00                       | \$0.00                       | 0%                                       | \$0.00                                   |
| 3115                                                                                                                                                            | Shelter Rent - Federal Section 8           | \$0.00                       | \$0.00                       | \$0.00                       | 0%                                       | \$0.00                                   |
| 3190                                                                                                                                                            | Nondwelling Rentals                        | \$0.00                       | \$0.00                       | \$0.00                       | 0%                                       | \$0.00                                   |
| 3400                                                                                                                                                            | Administrative Fee - MRVP                  | \$0.00                       | \$0.00                       | \$0.00                       | 0%                                       | \$0.00                                   |
| 3610                                                                                                                                                            | Interest on Investments - Unrestricted     | \$0.00                       | \$0.00                       | \$0.00                       | 0%                                       | \$0.00                                   |
| 3611                                                                                                                                                            | Interest on Investments - Restricted       | \$0.00                       | \$0.00                       | \$0.00                       | 0%                                       | \$0.00                                   |
| 3690                                                                                                                                                            | Other Revenue                              | \$1,750.00                   | \$2,806.00                   | \$2,250.00                   | -19.8%                                   | \$3.13                                   |
| 3691                                                                                                                                                            | Other Revenue - Retained                   | \$0.00                       | \$5,970.00                   | \$0.00                       | -100%                                    | \$0.00                                   |
| 3692                                                                                                                                                            | Other Revenue - Operating Reserves         | \$0.00                       | \$0.00                       | \$0.00                       | 0%                                       | \$0.00                                   |
| 3693                                                                                                                                                            | Other Revenue - Energy Net Meter           | \$0.00                       | \$0.00                       | \$0.00                       | 0%                                       | \$0.00                                   |
| 3801                                                                                                                                                            | Operating Subsidy - DHCD (4001)            | \$199,535.00                 | \$186,385.00                 | \$61,094.00                  | -67.2%                                   | \$84.85                                  |
| 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                              | \$489,285.00                 | \$481,358.00                 | \$359,660.00                 | -25.3%                                   | \$499.53                                 |

| Consolidated Budget (400-1) for all state-aided 667 (Elderly), 200 (family), and 705 (scattered site family) developments owned by Littleton Housing Authority. |                                             |                              |                           |                              |                                           |                                          |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------|------------------------------|---------------------------|------------------------------|-------------------------------------------|------------------------------------------|
| <b>EXPENSES</b>                                                                                                                                                 |                                             |                              |                           |                              |                                           |                                          |
| Account Number                                                                                                                                                  | Account Class                               | 2022 Approved Expense Budget | 2022 Actual Amounts Spent | 2023 Approved Expense Budget | % Change from 2022 Actual to 2023 Budget. | 2023 Dollars Budgeted per Unit per Month |
| 4110                                                                                                                                                            | Administrative Salaries                     | \$0.00                       | \$0.00                    | \$0.00                       | 0%                                        | \$0.00                                   |
| 4120                                                                                                                                                            | Compensated Absences                        | \$0.00                       | \$0.00                    | \$0.00                       | 0%                                        | \$0.00                                   |
| 4130                                                                                                                                                            | Legal                                       | \$150.00                     | \$0.00                    | \$3,500.00                   | 100%                                      | \$4.86                                   |
| 4140                                                                                                                                                            | Members Compensation                        | \$0.00                       | \$0.00                    | \$0.00                       | 0%                                        | \$0.00                                   |
| 4150                                                                                                                                                            | Travel & Related Expenses                   | \$0.00                       | \$0.00                    | \$0.00                       | 0%                                        | \$0.00                                   |
| 4170                                                                                                                                                            | Accounting Services                         | \$8,880.00                   | \$8,796.00                | \$9,182.00                   | 4.4%                                      | \$12.75                                  |
| 4171                                                                                                                                                            | Audit Costs                                 | \$3,780.00                   | \$7,560.00                | \$3,780.00                   | -50%                                      | \$5.25                                   |
| 4180                                                                                                                                                            | Penalties & Interest                        | \$0.00                       | \$0.00                    | \$0.00                       | 0%                                        | \$0.00                                   |
| 4190                                                                                                                                                            | Administrative Other                        | \$69,125.00                  | \$64,296.00               | \$72,000.00                  | 12%                                       | \$100.00                                 |
| 4191                                                                                                                                                            | Tenant Organization                         | \$0.00                       | \$0.00                    | \$0.00                       | 0%                                        | \$0.00                                   |
| 4100                                                                                                                                                            | TOTAL ADMINISTRATION                        | \$81,935.00                  | \$80,652.00               | \$88,462.00                  | 9.7%                                      | \$122.86                                 |
| 4310                                                                                                                                                            | Water                                       | \$28,980.00                  | \$25,545.00               | \$28,980.00                  | 13.4%                                     | \$40.25                                  |
| 4320                                                                                                                                                            | Electricity                                 | \$23,275.00                  | \$20,575.00               | \$23,275.00                  | 13.1%                                     | \$32.33                                  |
| 4330                                                                                                                                                            | Gas                                         | \$23,842.00                  | \$22,580.00               | \$23,842.00                  | 5.6%                                      | \$33.11                                  |
| 4340                                                                                                                                                            | Fuel                                        | \$0.00                       | \$0.00                    | \$0.00                       | 0%                                        | \$0.00                                   |
| 4360                                                                                                                                                            | Net Meter Utility Debit/Energy Conservation | \$0.00                       | \$0.00                    | \$0.00                       | 0%                                        | \$0.00                                   |
| 4390                                                                                                                                                            | Other                                       | \$6,500.00                   | \$0.00                    | \$4,000.00                   | 100%                                      | \$5.56                                   |
| 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                             | \$82,597.00                  | \$68,700.00               | \$80,097.00                  | 16.6%                                     | \$111.25                                 |

| Consolidated Budget (400-1) for all state-aided 667 (Elderly), 200 (family), and 705 (scattered site family) developments owned by Littleton Housing Authority. |                                       |                              |                           |                              |                                          |                                          |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------|------------------------------|---------------------------|------------------------------|------------------------------------------|------------------------------------------|
| <b>EXPENSES</b>                                                                                                                                                 |                                       |                              |                           |                              |                                          |                                          |
| Account Number                                                                                                                                                  | Account Class                         | 2022 Approved Expense Budget | 2022 Actual Amounts Spent | 2023 Approved Expense Budget | % Change from 2022 Actual to 2023 Budget | 2023 Dollars Budgeted per Unit per Month |
| 4410                                                                                                                                                            | Maintenance Labor                     | \$27,697.00                  | \$2,859.00                | \$0.00                       | -100%                                    | \$0.00                                   |
| 4420                                                                                                                                                            | Materials & Supplies                  | \$8,900.00                   | \$17,291.00               | \$10,700.00                  | -38.1%                                   | \$14.86                                  |
| 4430                                                                                                                                                            | Contract Costs                        | \$81,000.00                  | \$142,604.00              | \$70,000.00                  | -50.9%                                   | \$97.22                                  |
| 4400                                                                                                                                                            | TOTAL MAINTENANCE                     | \$117,597.00                 | \$162,754.00              | \$80,700.00                  | -50.4%                                   | \$112.08                                 |
| 4510                                                                                                                                                            | Insurance                             | \$11,525.00                  | \$11,293.00               | \$10,620.00                  | -6%                                      | \$14.75                                  |
| 4520                                                                                                                                                            | Payment in Lieu of Taxes              | \$3,600.00                   | \$3,600.00                | \$3,600.00                   | 0%                                       | \$5.00                                   |
| 4540                                                                                                                                                            | Employee Benefits                     | \$73,590.00                  | \$71,953.00               | \$65,984.00                  | -8.3%                                    | \$91.64                                  |
| 4541                                                                                                                                                            | Employee Benefits - GASB 45           | \$0.00                       | \$-2,505.00               | \$0.00                       | -100%                                    | \$0.00                                   |
| 4542                                                                                                                                                            | Pension Expense - GASB 68             | \$0.00                       | \$52,289.00               | \$0.00                       | -100%                                    | \$0.00                                   |
| 4570                                                                                                                                                            | Collection Loss                       | \$5,000.00                   | \$0.00                    | \$1,000.00                   | 100%                                     | \$1.39                                   |
| 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                 | \$8,091.00                   | \$0.00                    | \$0.00                       | 0%                                       | \$0.00                                   |
| 4500                                                                                                                                                            | TOTAL GENERAL EXPENSES                | \$101,806.00                 | \$136,630.00              | \$81,204.00                  | -40.6%                                   | \$112.78                                 |
| 4610                                                                                                                                                            | Extraordinary Maintenance             | \$0.00                       | \$0.00                    | \$2,700.00                   | 100%                                     | \$3.75                                   |
| 4611                                                                                                                                                            | Equipment Purchases - Non Capitalized | \$0.00                       | \$0.00                    | \$0.00                       | 0%                                       | \$0.00                                   |
| 4612                                                                                                                                                            | Restricted Reserve Expenditures       | \$0.00                       | \$0.00                    | \$0.00                       | 0%                                       | \$0.00                                   |
| 4715                                                                                                                                                            | Housing Assistance Payments           | \$0.00                       | \$0.00                    | \$0.00                       | 0%                                       | \$0.00                                   |
| 4801                                                                                                                                                            | Depreciation Expense                  | \$0.00                       | \$131,180.00              | \$0.00                       | -100%                                    | \$0.00                                   |
| 4600                                                                                                                                                            | TOTAL OTHER EXPENSES                  | \$0.00                       | \$131,180.00              | \$2,700.00                   | -97.9%                                   | \$3.75                                   |
| 4000                                                                                                                                                            | TOTAL EXPENSES                        | \$383,935.00                 | \$579,916.00              | \$333,163.00                 | -42.5%                                   | \$462.73                                 |

| Consolidated Budget (400-1) for all state-aided 667 (Elderly), 200 (family), and 705 (scattered site family) developments owned by Littleton Housing Authority. |                                       |                      |                     |                      |                                          |                                          |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------|----------------------|---------------------|----------------------|------------------------------------------|------------------------------------------|
| <b>SUMMARY</b>                                                                                                                                                  |                                       |                      |                     |                      |                                          |                                          |
| Account Number                                                                                                                                                  | Account Class                         | 2022 Approved Budget | 2022 Actual Amounts | 2023 Approved Budget | % Change from 2022 Actual to 2023 Budget | 2023 Dollars Budgeted per Unit per Month |
| 3000                                                                                                                                                            | TOTAL REVENUE                         | \$489,285.00         | \$481,358.00        | \$359,660.00         | -25.3%                                   | \$499.53                                 |
| 4000                                                                                                                                                            | TOTAL EXPENSES                        | \$383,935.00         | \$579,916.00        | \$333,163.00         | -42.5%                                   | \$462.73                                 |
| 2700                                                                                                                                                            | NET INCOME (DEFICIT)                  | \$105,350.00         | \$-98,558.00        | \$26,497.00          | -126.9%                                  | \$36.80                                  |
| 7520                                                                                                                                                            | Replacements of Equip. - Capitalized  | \$0.00               | \$0.00              | \$0.00               | 0%                                       | \$0.00                                   |
| 7540                                                                                                                                                            | Betterments & Additions - Capitalized | \$0.00               | \$0.00              | \$0.00               | 0%                                       | \$0.00                                   |
| 7500                                                                                                                                                            | TOTAL NONOPERATING EXPENDITURES       | \$0.00               | \$0.00              | \$0.00               | 0%                                       | \$0.00                                   |
| 7600                                                                                                                                                            | EXCESS REVENUE OVER EXPENSES          | \$105,350.00         | \$-98,558.00        | \$26,497.00          | -126.9%                                  | \$36.80                                  |

## 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**

The Performance Management Review conducted by the Department of Housing and Community Development (DHCD) for the 2022 LHA fiscal year resulted in the following ratings. Criteria which received a 'Corrective Action' rating show both a reason for the rating and a response by the LHA. The reason indicates Littleton Housing Authority's understanding of why they received the rating, while the responses describe their goals and the means by which they will meet or improve upon the performance-based assessment standards established by DHCD in the PMR. When the PMR rating is 'Operational Guidance', the LHA may have responded, but was not required to.

**Category: Management**

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

Rating: No Findings

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

Rating: Paused due to COVID-19

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

Rating: Operational Guidance

Criterion: Completion of mandatory online board member training

Rating: Operational Guidance

Criterion: Annual Plan Submitted - Annual Plan (AP) submitted on time

Rating: No Findings

**Category: Financial**

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

Rating: Paused due to COVID-19

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

Rating: Corrective Action

Reason: We over spent it our OR as we had multiple units needing repairs - turnovers.  
Also our retirement & insurance costs sky rocketed

Response: We have since applied for unit turnover Sustainability funds as well as DHCD ER funds and have received some in order to turn over the units needed.

**Category: Capital Planning**

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

Rating: Paused due to COVID-19

**Category: Facility Management - Health & Safety**

Criterion: Health and Safety Violations

DHCD has observed conditions at the LHA's developments and reported the following health and safety violations. The LHA has certified the number of corrected violations in each category.

|                                           | <b>Number of violations<br/>cited</b> | <b>Number of violations<br/>corrected</b> |
|-------------------------------------------|---------------------------------------|-------------------------------------------|
| <b>Maintenance related<br/>violations</b> | 2                                     | 2                                         |
| <b>Tenant related<br/>violations</b>      | 4                                     | 4                                         |

**Category: Facility Management - Inspections**

Criterion: LHA Conducted 100% of the Unit Inspections.

Rating: Paused due to COVID-19

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

Rating: Paused due to COVID-19

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

Rating: Paused due to COVID-19

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

Rating: Paused due to COVID-19

Criterion: Inspection work orders were completed within 30 calendar days from the date of inspection, OR if cannot be completed with 30 calendar days, are added to the Deferred Maintenance Plan or included in the Capital Improvement Plan in the case of qualifying capital repairs (unless health/safety issue).

Rating: Paused due to COVID-19

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

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

Rating: No Findings

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

Rating: No Findings

Criterion: Vacancy work orders identified, tracked and reportable.

Rating: No Findings

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

Rating: No Findings



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

Rating: Corrective Action

Reason: Our FMS did not like our Preventative maintenance plan from SHARP.

Response: We have since changed to PHA-Web

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

Rating: Operational Guidance

Criterion: Requested work orders identified, tracked and reportable.

Rating: No Findings

Criterion: Requested work orders were completed in 14 calendar days from the date of tenant request or it not ocmpleted within that timeframe (and not a health or safety issue), the task was added and completed in a timely manner as a part of the Deferred Maintenance Plan and/or CIP.

Rating: Paused due to COVID-19

**Category: Facility Management - Emergency Response System:**

Criterion: Housing authorities has 24 Hour Emergency Response System, Distributed Emergency Definition to Residents, Staff, and Answering Service (if applicable).

Rating: No Findings

## Explanation of PMR Criteria Ratings

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

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

| CRITERION                                | DESCRIPTION                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
|------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Health &amp; Safety</b>               |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| Health & safety violations               | DHCD has observed conditions at the LHA's developments and reported health and safety violations. The LHA has certified the number of corrected violations in each category.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| <b>Facility Management - Inspections</b> |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| Unit Inspections Conducted               | Housing authorities are required to conduct inspections of all their occupied units at least once a year <ul style="list-style-type: none"> <li>• "No Findings": 100 % of sampled units had inspections conducted once during the year</li> <li>• "Corrective Action": Fewer than 100% of sample units were inspected during the year</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| Inspections Report                       | Housing authorities are required to note all of the deficiencies found during inspections <ul style="list-style-type: none"> <li>• "No Findings": 100 % of deficiencies are noted on inspection report</li> <li>• "Corrective Action": Fewer than 100% of deficiencies are noted in inspection report</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| Inspection Work Order                    | Housing authorities are required to generate work orders for all deficiencies noted during inspections <ul style="list-style-type: none"> <li>• "No Findings": 100 % of deficiencies noted on inspection reports generated work orders</li> <li>• "Corrective Action": Fewer than 100% of deficiencies noted on inspection reports generated work orders</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| Work Order System                        | Work order system identifies, tracks, and can produce reports for inspection work orders. <ul style="list-style-type: none"> <li>• "No Findings": Inspection work orders are identified, tracked, and reportable</li> <li>• "Operational Guidance": Inspection work orders are not identified, and/or tracked, and/or reportable</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| Inspections Work Orders Completed        | Inspection work orders were completed within 30 calendar days from the date of inspection, OR if cannot be completed within 30 calendar days, are added to the Deferred Maintenance Plan or included in the Capital Improvement Plan in the case of qualifying capital repairs (unless health/safety issue). <ul style="list-style-type: none"> <li>• "No Findings": Sampled inspection work orders were completed within 30 days of inspection date or added to deferred maintenance plan and/or CIP</li> <li>• "Operational Guidance": Sampled inspection work orders were completed within 31 to 45 calendar days of inspection date and not added to deferred maintenance plan or CIP</li> <li>• "Corrective Action": Sampled inspection work orders were completed in over 45 calendar days of inspection date</li> </ul> |

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

| CRITERION                        | DESCRIPTION                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
|----------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Requested Work Orders            | <p>Requested work orders should be identified, tracked and reportable.</p> <ul style="list-style-type: none"> <li>• “No Findings”: Requested work orders identified, tracked, reportable and completed regularly</li> <li>• “Operational Guidance”: Requested work orders are not identified and/or tracked and/or reportable, and or completed regularly</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                  |
| Requested Work Orders Completion | <p>Requested work orders should be completed in 14 calendar days from the date of tenant request or if not completed within that timeframe (and not a health or safety issue), the task should be added and completed in a timely manner as a part of the Deferred Maintenance Plan and/or CIP.</p> <ul style="list-style-type: none"> <li>• “No Findings”: Requested work orders are completed within 14 calendar days of tenant request OR added to deferred maintenance plan and/or CIP</li> <li>• “Operational Guidance”: Requested work orders are completed within 15-30 calendar days from the date of tenant request</li> <li>• “Corrective Action”: Requested work orders are completed in over 30 calendar days from the date of tenant request OR not completed</li> </ul> |
| Emergency Response System        | <p>Housing authorities should have a 24 Hour Emergency Response System and distribute Emergency Definition to Residents, Staff, and Answering Service (if applicable).</p> <ul style="list-style-type: none"> <li>• “No Findings”: A 24-hour system for responding to emergencies exists AND definitions of emergencies have been distributed to staff, residents and answering service, if applicable</li> <li>• “Operational Guidance”: System exists, but no definition has been distributed</li> <li>• “Corrective Action”: Neither a system nor distributed definitions exist</li> </ul>                                                                                                                                                                                         |

## **Policies**

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

| <b>Policy</b>                    | <b>Last Ratified<br/>by Board Vote</b> | <b>Notes</b>                                              |
|----------------------------------|----------------------------------------|-----------------------------------------------------------|
| *Rent Collection Policy          | 11/04/2020                             |                                                           |
| *Personnel Policy                | 11/04/2020                             |                                                           |
| *Capitalization Policy           | 11/04/2020                             |                                                           |
| *Procurement Policy              | 11/04/2020                             |                                                           |
| *Grievance Policy                | 11/04/2020                             |                                                           |
| Smoking Policy                   | 08/05/2015                             |                                                           |
| Fair Housing Marketing Plan      |                                        | We are going to address this at<br>a future board meeting |
| Language Access Plan             |                                        | We are going to address this at<br>a future board meeting |
| Reasonable Accommodations Policy |                                        | We are going to address this at<br>a future board meeting |

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

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

**Waivers**

AP-2024-Littleton Housing Authori-00704 has no current waivers from the regulations of the Department of Housing and Community Development (DHCD).



## Glossary

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

**AHVP:** Alternative Housing Voucher Program

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

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

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

**AP:** Annual Plan

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

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

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

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

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

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

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

**CNA:** Capital Needs Assessment

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

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

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

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

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

**FF:** Formula Funding

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

**FYE:** Fiscal Year End

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

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

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

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

**LHA:** Local Housing Authority

**LTO:** Local Tenants Organization

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

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

**MOR:** Management and Occupancy Report

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

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

**Performance Management Review (PMR):**

**PMR:** Performance Management Review

**RCAT:** Regional Capital Assistance Team

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

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

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

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

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

## **Attachments**

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

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

- Cover sheet for tenant satisfaction surveys
- Tenant Satisfaction Survey 667 Program
- Performance Management Review

## **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 residents, and returned to CSR by mail (or, starting in 2019, completed on-line). CSR surveys residents of elderly/disabled units (also known as Chapter 667) and family units (also known as Chapter 200 and Chapter 705).

During each round all units 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 units 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 units (c.667) in three groups in the Fall of 2016, 2017 and 2018. CSR surveyed residents of family units (c.705 and c.200) in the Spring of 2016. (Note: there are many more c.667 units, so they were broken down into three groups).

### *Notes on 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. We originally combined data from c.667 and c.200/705 units for some LHAs with limited family data. 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 results from the different programs 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 units in Fall 2019 and in Fall 2021 and all of the family units in Fall 2020. We expect the remaining elderly/disabled units to be surveyed in Fall 2022.

### *Notes on 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, we determined that combining the two yielded less accurate results.

# LITTLETON 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.

### Fall 2018:

- Surveys were sent to 13,304 housing units (Chapter 667). 6717 surveys were filled out and returned.
- In the **Littleton Housing Authority**, surveys were sent to a total of **48** housing units (Chapter 667); **24** surveys were completed.

This report provides some information about how the residents from the **Littleton Housing Authority** who answered the survey responded. It compares their answers to those from residents in the entire state and to those from small LHAs in Central Massachusetts. These small LHAs in Central Massachusetts include: Acton, Auburn, Ayer, Charlton, Clinton, Concord, Dudley, Gardner, Grafton, Groton, Holden, Hopkinton, Hudson, Lancaster, Leicester, Littleton, Lunenburg, Maynard, North Brookfield, Northborough, Northbridge, Oxford, Pepperell, Shrewsbury, Southborough, Southbridge, Spencer, Sterling, Sudbury, Sutton, Templeton, Upton, Uxbridge, Webster, West Boylston, West Brookfield, Westborough, Westford, and Winchendon.

## Communication

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

|                                                                                                           | Littleton<br>Housing<br>Authority | Small LHAs in<br>Central MA * | Entire<br>State |
|-----------------------------------------------------------------------------------------------------------|-----------------------------------|-------------------------------|-----------------|
| Contacted management about a problem or concern.....                                                      | 96%                               | 77%                           | 78%             |
| Felt they were usually or always treated with courtesy<br>and respect when they contacted management..... | 87%                               | 89%                           | 87%             |
| Saw the Capital Improvement Plan.....                                                                     | 21%                               | 32%                           | 30%             |
| Saw the Operating Budget.....                                                                             | 13%                               | 18%                           | 17%             |
| Knew the Executive Director held a meeting with residents...                                              | 73%                               | 53%                           | 53%             |

\* Small LHAs in Central Massachusetts include: Acton, Auburn, Ayer, Charlton, Clinton, Concord, Dudley, Gardner, Grafton, Groton, Holden, Hopkinton, Hudson, Lancaster, Leicester, Littleton, Lunenburg, Maynard, North Brookfield, Northborough, Northbridge, Oxford, Pepperell, Shrewsbury, Southborough, Southbridge, Spencer, Sterling, Sudbury, Sutton, Templeton, Upton, Uxbridge, Webster, West Boylston, West Brookfield, Westborough, Westford, and Winchendon.

## Services and Programs

**71%** of the Littleton 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:

|                                                                                  | Littleton<br>Housing<br>Authority | Small LHAs in<br>Central MA | Entire<br>State |
|----------------------------------------------------------------------------------|-----------------------------------|-----------------------------|-----------------|
| Job training programs.....                                                       | 13%                               | 4%                          | 6%              |
| Money management programs<br>( <i>budgeting, taxes, income building</i> ).....   | 8%                                | 9%                          | 10%             |
| Children's programs<br>( <i>tutoring, childcare, afterschool programs</i> )..... | 4%                                | 1%                          | 2%              |
| Health and Medical Services<br>( <i>visiting nurse, meal programs</i> ).....     | 58%                               | 34%                         | 35%             |
| Adult Education<br>( <i>GED, ESL, educational counseling</i> ) .....             | 4%                                | 7%                          | 10%             |

## Maintenance and Repair

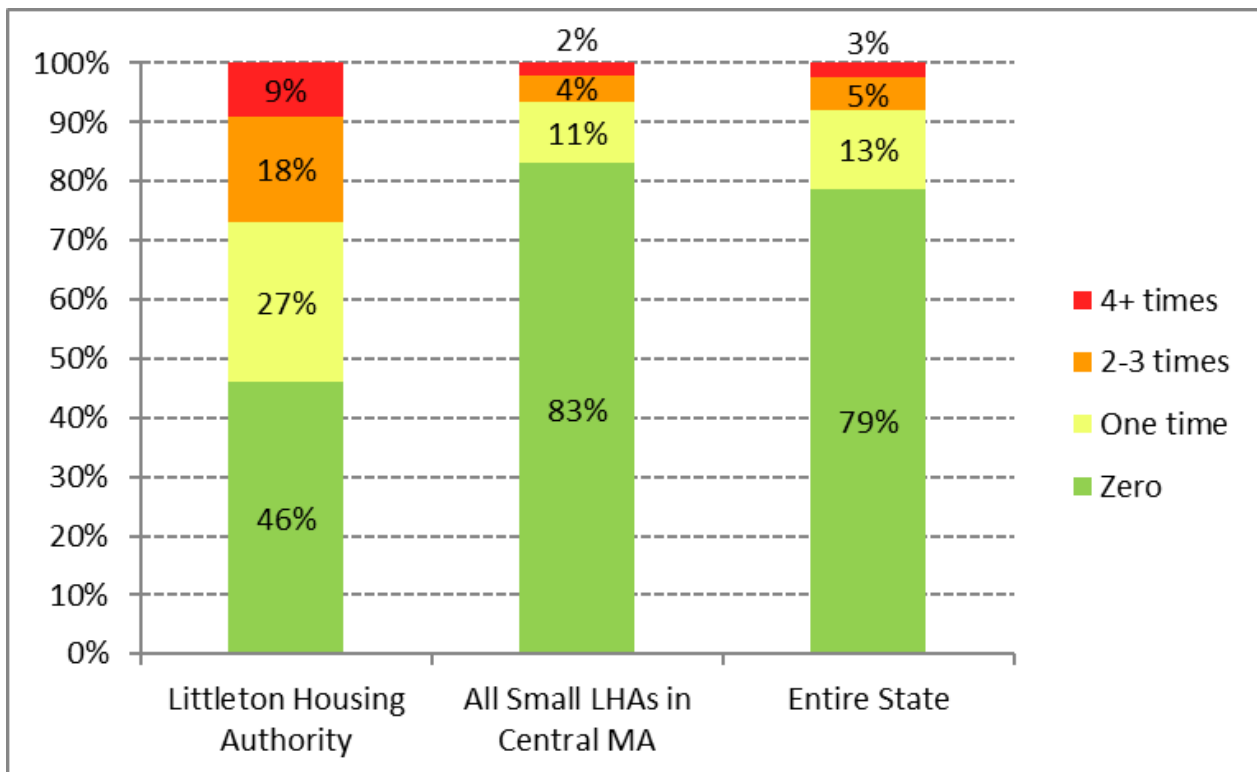
**Who had problems?** About one-half of respondents had a problem with their heating and about three-quarters had a plumbing problem in the last 12 months.

|                                           | Littleton<br>Housing<br>Authority | Small LHAs in<br>Central MA | Entire<br>State |
|-------------------------------------------|-----------------------------------|-----------------------------|-----------------|
| Had a heating problem.....                | 58%                               | 17%                         | 21%             |
| Had a problem with water or plumbing..... | 71%                               | 47%                         | 49%             |

- **Heating Problems**

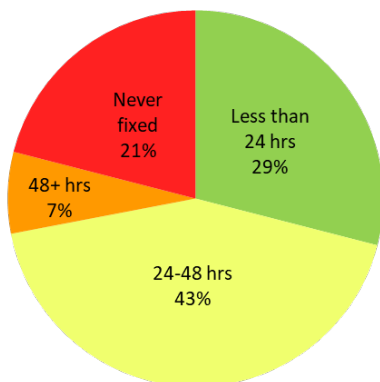
**How many times did residents have heating problems?**

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.

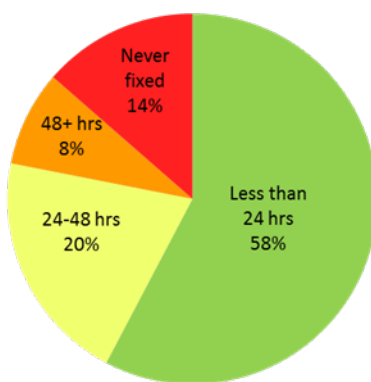


**How long did it take to fix the heating problems?** For those respondents who had problems, we asked how long it usually took for the problems to be fixed – less than 24 hours, 24 - 48 hours, more than 48 hours, or never fixed.

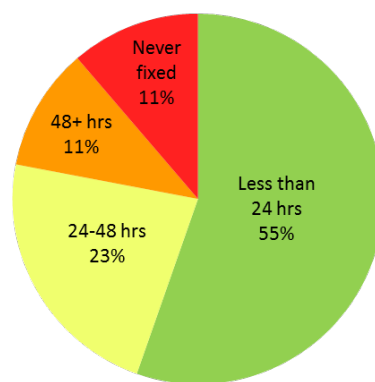
**Littleton  
Housing Authority**



**Small LHAs  
in Central MA**



**Entire State**

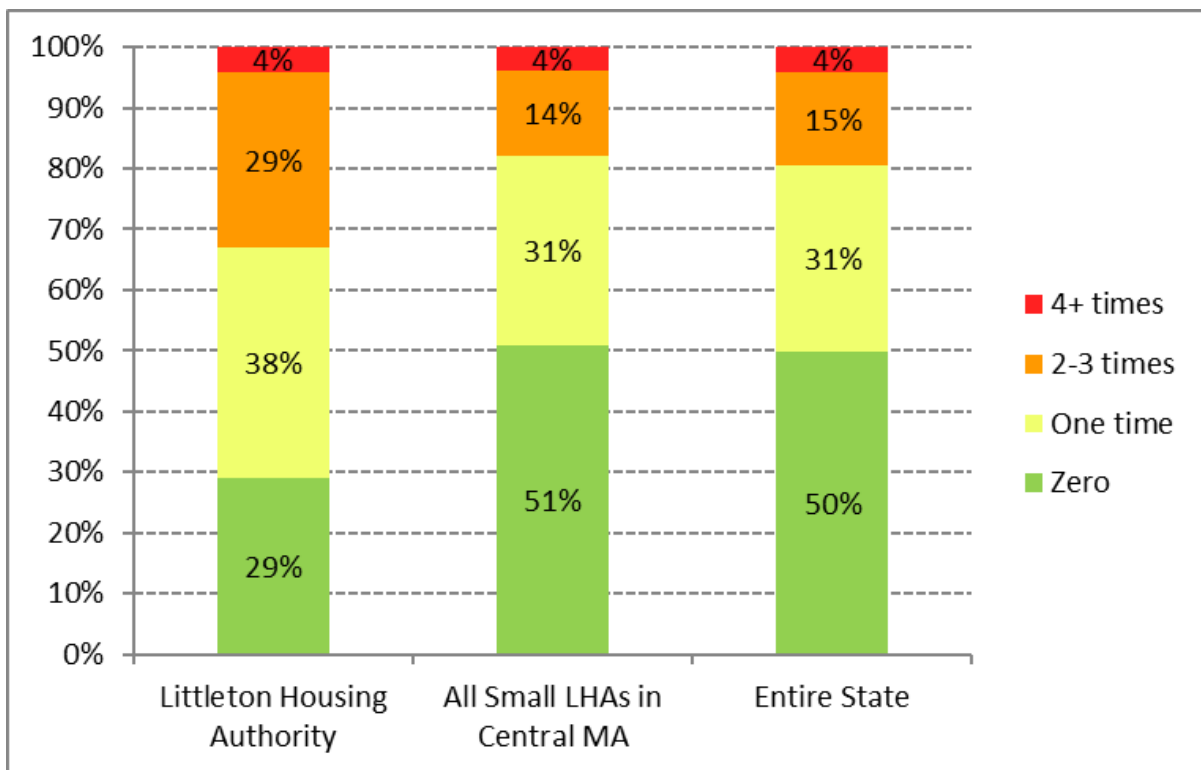




- **Water or Plumbing Problems**

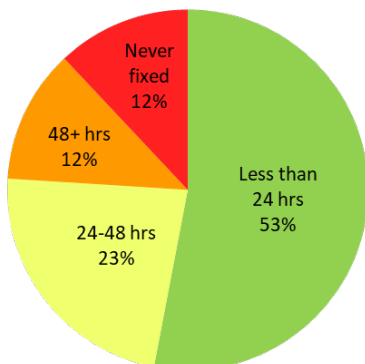
**How many times did residents have problems with their water or plumbing?**

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.

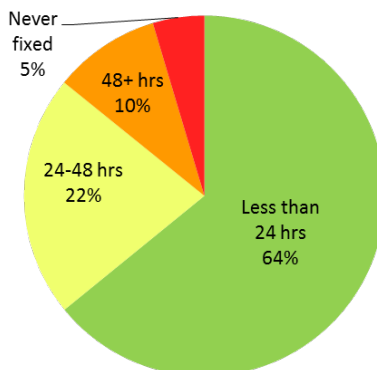


**How long did it take to fix the water or plumbing problems?** For those respondents who had problems, we asked how long it usually took for the problems to be fixed – less than 24 hours, 24 - 48 hours, more than 48 hours, or never fixed.

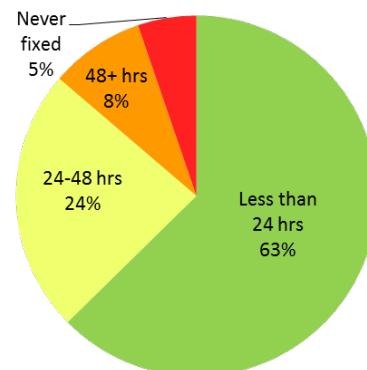
**Littleton Housing Authority**



**Small LHAs in Central MA**

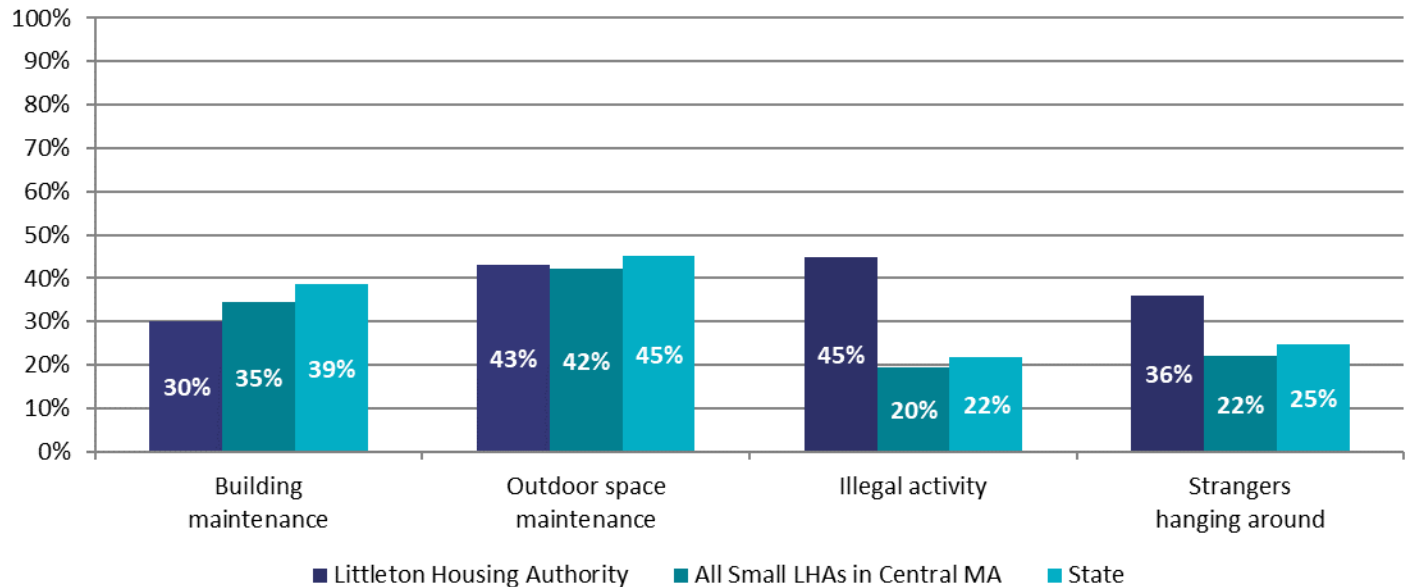


**Entire State**



- **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.

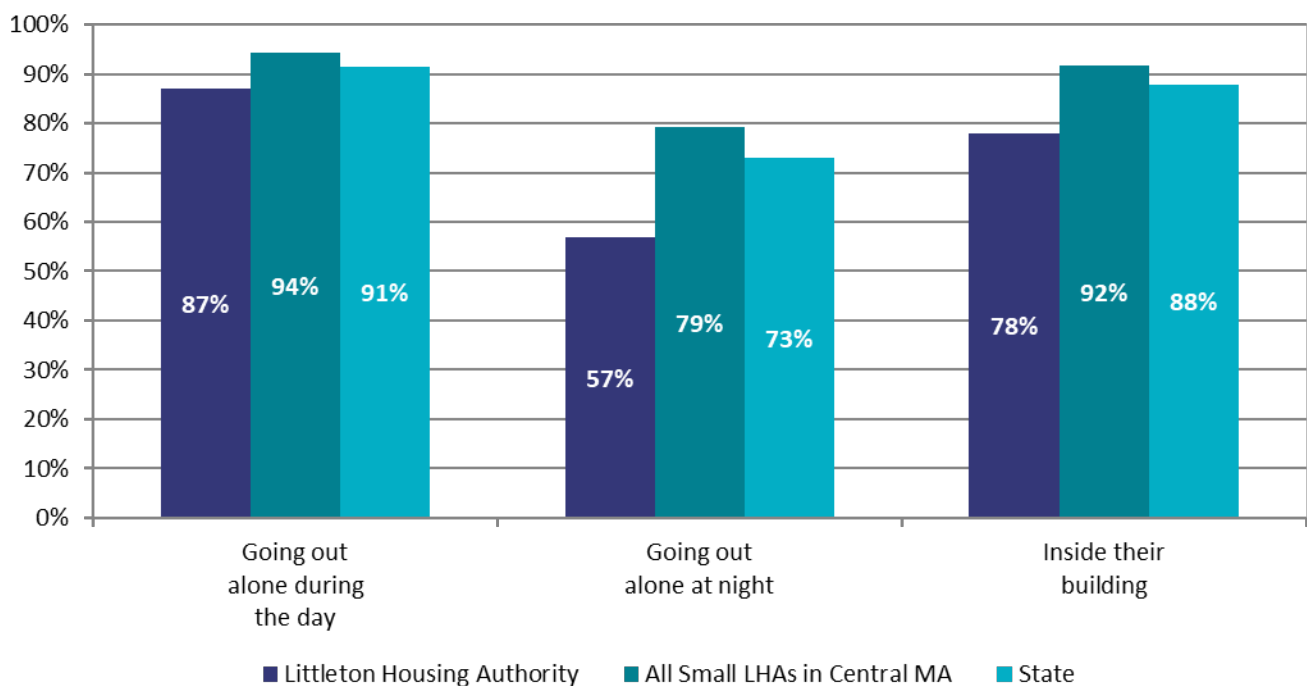
#### Respondents who “always” or “sometimes” had problems with....



## 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” ....



LITTLETON  
HOUSING AUTHORITY  
Performance Management Review  
(PMR) Report  
Fiscal Year End 03/31/2022

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

# Performance Management Review

| <b>DEPARTMENT OF HOUSING AND COMMUNITY DEVELOPMENT (DHCD)</b><br><b>PMR Desk Audit Ratings Summary</b> <b>Official Published PMR Record</b><br><b>For a detailed report of the Performance Management Review (PMR), please contact the Local Housing Authority</b> |                             |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------|
| Housing Authority                                                                                                                                                                                                                                                  | Littleton Housing Authority |
| Fiscal Year Ending                                                                                                                                                                                                                                                 | 03/31/2022                  |
| Housing Management Specialist                                                                                                                                                                                                                                      | Thomas Lee                  |
| Facilities Management Specialist                                                                                                                                                                                                                                   | Todd Lawson                 |

| Criteria                                 | Score/Rating           |                        |                |                        |
|------------------------------------------|------------------------|------------------------|----------------|------------------------|
|                                          | Management             |                        |                |                        |
| Occupancy Rate                           | <b>c.667</b>           | <b>c.705</b>           | <b>c.200</b>   | <b>Cumulative</b>      |
|                                          | No Findings            | No Findings            | Not Applicable | No Findings            |
| Tenant Accounts Receivable (TAR)         | <b>c.667</b>           | <b>c.705</b>           | <b>c.200</b>   | <b>Cumulative</b>      |
|                                          | Paused due to COVID-19 | Paused due to COVID-19 | Not Applicable | Paused due to COVID-19 |
| Board Member Training                    | Operational Guidance   |                        |                |                        |
| Certifications and Reporting Submissions | Operational Guidance   |                        |                |                        |
| Annual Plan                              | No Findings            |                        |                |                        |
|                                          | Financial              |                        |                |                        |
| Adjusted Net Income                      | Paused due to COVID-19 |                        |                |                        |
| Operating Reserves                       | Corrective Action      |                        |                |                        |
|                                          | Capital                |                        |                |                        |
| Capital Spending                         | Paused due to COVID-19 |                        |                |                        |

## LHA Littleton Housing Authority

### Occupancy

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

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

### Certifications and Reporting Submissions

Rating: Operational Guidance

- ☒ Submit all four quarterly vacancy certifications by the end of the month following the quarter end.
- ☐ Submit all four quarters of Tenants Accounts Receivables (TAR) application within 60 days of quarter end.
- ☐ Submit all four quarterly operating statements within 60 days of the quarter end.
- ☒ Schedule board meetings well in advance. Consider scheduling a backup date to ensure you are able to have your board vote/approval in time to meet reporting deadlines.
- ☒ Set a recurring appointment in your email calendar for help remembering reporting dates and deadlines.
- ☐ **Other:**

## Operating Reserve

### Rating: Corrective Action

- ☒ Please refer to PHN 2018-04 and current budget guidelines for information on operating reserve
- ☒ An LHA may spend down to 35% of maximum reserve level without consulting DHCD, but the LHA must budget these expenses in the correct line items of their annual operating budget. If the expense occurred after DHCD approval of the annual operating budget, the LHA should submit a budget revision with these expenditures.
- ☒ Any expenditures from the operating reserve that will result in a projected operating reserve of less than 35% of maximum reserve level, requires *prior written approval* from DHCD, *unless the expenses are to resolve health and safety issues*.
- ☒ Each LHA must maintain a projected operating reserve of 20% of maximum reserve level, which *remains the minimum operating reserve level for all LHAs*.
- ☐ **Other:**

## Board Member Training

### Rating: Operational Guidance

- ☐ Ensure you update the board attendance application with the most recent board members, and their term dates.
- ☒ Ensure each board member has a unique email for the board member training.
- ☒ Provide computer guidance as needed to help board members complete the training.
- ☐ **Other:**

## Annual Plan Submission

### Rating: No Findings

- ☐ Ensure you submit the Annual Plan on time.
- ☐ **Other:**

| DEPARTMENT OF HOUSING AND COMMUNITY DEVELOPMENT (DHCD)<br>PMR Physical Condition Ratings |                             |
|------------------------------------------------------------------------------------------|-----------------------------|
| Housing Authority                                                                        | Littleton Housing Authority |
| Fiscal Year Ending                                                                       | 3/31/2022                   |
| Housing Management Specialist                                                            | Thomas Lee                  |
| Facilities Management Specialist                                                         | Todd Lawson                 |

| Inspection and Work Order System Criteria                                                                                                                                                                                                                                                                    | Rating               |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------|
| Inspections                                                                                                                                                                                                                                                                                                  |                      |
| LHA conducted 100% of the unit inspections.                                                                                                                                                                                                                                                                  | No Findings          |
| Inspections report noted 100% of the necessary repairs in each unit.                                                                                                                                                                                                                                         | No Findings          |
| 100% of inspection-related work orders were generated.                                                                                                                                                                                                                                                       | No Findings          |
| Work order system identifies, tracks, and can produce reports for inspection work orders.                                                                                                                                                                                                                    | No Findings          |
| Inspection work orders were completed within 30 calendar days from the date of inspection, OR if cannot be completed within 30 calendar days, are added to the Deferred Maintenance Plan or included in the Capital Improvement Plan in the case of qualifying capital repairs (unless health/safety issue). | No Findings          |
| Work Order System                                                                                                                                                                                                                                                                                            |                      |
| Emergency work orders defined per PMG, identified, tracked, reportable.                                                                                                                                                                                                                                      | No Findings          |
| Emergency work orders initiated within 24 to 48 hours.                                                                                                                                                                                                                                                       | No Findings          |
| Vacancy work orders identified, tracked and reportable.                                                                                                                                                                                                                                                      | No Findings          |
| Vacancy work orders were completed within 30 calendar days or if not completed within that timeframe, LHA has a waiver.                                                                                                                                                                                      | No Findings          |
| Comprehensive Preventive Maintenance Program exists & preventive work orders identified, tracked, and reportable.                                                                                                                                                                                            | Corrective Action    |
| Routine work orders identified, tracked, reportable and completed regularly.                                                                                                                                                                                                                                 | Operational Guidance |
| Requested work orders are identified, tracked and reportable.                                                                                                                                                                                                                                                | No Findings          |
| Requested work orders were completed in 14 calendar days from the date of tenant request or if not completed within that timeframe (and not a health or safety issue), the task was added and completed in a timely manner as a part of the Deferred Maintenance Plan and/or CIP.                            | No Findings          |
| LHAs have a 24 hour system for responding to emergencies and have distributed definition of emergency to residents, staff and answering service (if applicable).                                                                                                                                             | No Findings          |

**DEPARTMENT OF HOUSING AND COMMUNITY DEVELOPMENT (DHCD)**  
**PMR Physical Condition Report**

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

|                                         |                                    |
|-----------------------------------------|------------------------------------|
| <b>Housing Authority</b>                | <b>Littleton Housing Authority</b> |
| <b>Fiscal Year Ending</b>               | <b>3/31/2022</b>                   |
| <b>Housing Management Specialist</b>    | <b>Thomas Lee</b>                  |
| <b>Facilities Management Specialist</b> | <b>Todd Lawson</b>                 |

**Health and Safety Violations. Must be initiated within 24 to 48 hours. If the box below is not checked, you did not have any health and safety violations.**

☒ DHCD will provide a list of health and safety violations found. Inspection reports will be provided by your HMS. The health and safety items have an 'X' in the HS column of the inspection report. Actions to correct these violations must be initiated within 24 to 48 hours. When you have completed work orders for these items send documentation to [dhcd-phinspectionviolations@massmail.state.ma.us](mailto:dhcd-phinspectionviolations@massmail.state.ma.us). In the subject line please indicate the LHAName and the PMR Year. If health and safety violations are not resolved within 60 days, DHCD will follow-up with a second site visit.



**Criteria A: LHA conducted 100% of the unit inspections - No Findings**

- ☐ Look to a nearby LHA for help with inspections (formulate a management agreement)
- ☐ Attend a Regional DHCD-led Inspection Training (in person)
- ☐ Refer to Property Maintenance Guide - Chapter 3 on Inspections See Handout B
- ☐ Consider Organization of Staff (see Chapter 4 of PMG) See Handout B
- ☐ Develop/Improve internal organizational processes and procedures to ensure you are properly scheduling, tracking, and documenting inspections throughout the year.
- ☐ Consider software (web-based applications) or Excel/Access to help you conduct/track/document inspections See Handout H
- ☐ Schedule your inspections throughout the year (by development or by anniversary date), rather than once a year
- ☐ Hire a qualified contractor (contact the DHCD Compliance Specialist (#617-573-1100 or dhcd-publichousingprocurement@massmail.state.ma.us) for procurement information)

Additional Notes:

**Criteria B: Inspection report noted 100% of the necessary repairs in each unit - No Findings**

- ☐ Unable to make recommendations as did not notify tenants of possible inspections
- ☐ Attend a Regional DHCD-led Inspection Training (in person)
- ☐ Look into maintenance trainings offered by MAHAMS See Handout L
- ☐ Include tenant violations in inspection reports
- ☐ Review state sanitary code ([https://www.mass.gov/files/documents/2016/07/pv/105cmr410\\_0.pdf](https://www.mass.gov/files/documents/2016/07/pv/105cmr410_0.pdf))

Additional Notes:

**Criteria C: 100% of inspection-related work orders were generated - No Findings**

- ☐ Attend a Regional DHCD-led Inspection Training (in person)
- ☐ Refer to Property Maintenance Guide - Chapter 3 on Inspections See Handout B
- ☐ Ensure all tenant violations are included in the inspection report and that these violations are followed-up on by administrative staff with the tenant.
- ☐ Develop internal organizational processes and procedures to ensure you are properly generating and tracking inspection work orders throughout the year
- ☐ Improve internal organizational processes and procedures to ensure you are properly generating and tracking inspection work orders throughout the year
- ☐ Consider software (web-based applications) or Excel/Access to help you conduct/generate/track inspections See Handout H

Additional Notes:

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

Criteria D: Inspection - No Findings

Criteria F: Emergency (defined per PMG) - No Findings

Criteria H: Vacancy - No Findings

Criteria K: Routine - Operational Guidance

Criteria L: Requested - No Findings

- ☐ Consider software (web-based applications) or Excel/Access to help you generate/track/close out work orders See Handout H
- ☐ Refer to Property Maintenance Guide - Chapters 1 to 3 on Work Order Systems See Handout B
- ☐ Refer to PHN 2016-16 and 2016-36 and 2018-8 on Maintenance Aspects of Performance Management Review See Handout C+D
- ☒ Train staff on work order types and how to input them into your work order system/If you use web-based software, reach out to your vendor for training/training materials/changes to the software See Handout K + Software Handouts (M, N, or O) If Applicable
- ☒ LHA should align work order types, their priorities and a definition of what is considered an emergency with the Property Maintenance Guide (Pages I-5 to I-10) See Handout B + K
- ☐ Look to other LHAs with strong work order systems/processes and procedures around work orders and ask for their assistance
- ☐ Definition of Emergency Work Orders Should Be Conditions (no matter the time of day) which are immediately threatening to the life or safety of your residents, staff, or structures. LHA should create emergency list and distribute to staff and tenants. Produce emergency work orders for any work that is on list and initiate work within 24 to 48 hours. See Handout J
- ☐ LHA should establish a system of move out inspections for all vacant units. Produce work orders from those move out inspection reports, and list on work order time spent working on turnover, date turnover was started and date finished, list of work done, and material used.

### Additional Notes:

LHA just switch over from Sharp to PHAnetwork. LHA is now learning the new work orders software system.

## Timely Completion of Work Order Types

Criteria E: Inspection - No Findings

Criteria G: Emergency - No Findings

Criteria I: Vacancy - No Findings

Criteria M: Requested - No Findings

- ☐ Consult DHCD's list of work order types, their priorities and a definition of what is considered an emergency See Handout J + K
- ☐ Refer to Property Maintenance Guide - Chapters 1 to 3 on Work Order Systems See Handout B
- ☐ Refer to PHNs 2016-16 and 2016-36 and 2018-8 on Maintenance Aspects of Performance Management Review See Handout C + D
- ☐ Vacancy turnovers should be completed within 30 calendar days or less. If cannot complete work within 30 days, LHA should contact Housing Management Specialist for a waiver. Use Online Vacancy System to Apply for Waivers (see PHN 2013 - 07) for Waiver Types (if waiver-eligible) See Handout G
- ☐ Consider Use of Capital Improvement Plan (CIP) for Capital Projects (see PHN 2012-22 for Capital vs. Operating funds; Contact Your Project Manager or RCAT for More Information) See Handout I
- ☐ Hire a qualified contractor (if plan to procure, contact DHCD Compliance Specialist (#617-573-1100 or dhcd-publichousingprocurement@massmail.state.ma.us) for procurement information
- ☐ Schedule your inspections throughout the year (by development or by anniversary date), rather than once a year
- ☐ Train staff on work order types and how to input them into your work order system/If you use web-based software, reach out to your vendor for training/training materials/changes to the software See Handout K + Software Handouts (M, N or O) If Applicable
- ☐ Consider software (web-based applications) or Excel/Access to help you generate/track/close out work orders See Handout H
- ☐ Consider Use of a Deferred Maintenance Plan/Operating Funds (Talk to Facilities Management Specialist and/or Housing Management Specialist)
- ☐ Look into Maintenance trainings offered by MAHAMS See Handout L
- ☐ Look into Dwelling Unit Inspection trainings offered by DHCD
- ☐ Look to other LHAs with strong work order systems/processes around work orders and ask for their assistance (possibly formulate a management agreement)
- ☐ Request Vacant Unit Funds (see PHN 2016-34 for more information) See Handout F
- ☐ Look for other external funding sources
- ☐ Build a broader vendor network (to ensure timely delivery of parts/materials)
- ☐ Consider Organization of Staff (see Chapter 4 of PMG) See Handout B

### Additional Notes:

#### Emergency Work Order:

#### Vacancy Work Order:

#### Timeliness Requested Work Order:

#### Timeliness of Inspection Work Order:

**Criteria J: Comprehensive Preventive Maintenance Program Exists + Preventive Work Orders Identified, Tracked, Reportable - Corrective Action**

- ☐ Refer to the Property Maintenance Guide (Pages I-23 to I-32 and Pages 8-7 to 8-26) See Handout B
- ☐ Refer to Annual PHNs on this topic, latest of which was PHN 2016-18 "Preventive Maintenance Monthly Reminders" See Handout E
- ☐ Process to schedule, generate, prioritize, and track work orders as a part of the Preventive Maintenance Program (consider using software to automate processes where possible) See Handout H
- ☐ Designate one person with the responsibility of reviewing/updating the Preventive Maintenance Program on a regular basis, as well as in real-time as new equipment is purchased
- ☐ Create a Preventive Maintenance Program/Plan that helps in the upkeep of all buildings and equipment. Work orders should be created and closed for all items on Preventive Maintenance Plan; Consult the Property Maintenance Guide (Pages I-23 to I-32) and Public Housing Notices 2016 - 18 "Preventive Maintenance Reminders" for how to develop a Preventive Maintenance Program See Handout B
- ☒ Consider software (web-based applications) or Excel/Access to help you generate/track/close out work orders See Handout H
- ☒ Refer to Property Maintenance Guide - Chapters 1 to 3 on Work Order Systems See Handout B
- ☒ Refer to PHN 2016-16 and 2016-36 and 2018-8 on Maintenance Aspects of Performance Management Review See Handout C+D
- ☒ Train staff on work order types and how to input them into your work order system/If you use web-based software, reach out to your vendor for training/training materials/changes to the software See Handout K + Software Handouts (M, N, or O) If Applicable
- ☒ Look to other LHAs with strong work order systems/processes and procedures around work orders and ask for their assistance

**Additional Notes:**

It is recommended that LHA create a Preventive Plan that helps in the upkeep of all buildings and equipment. Work orders should be created and closed for all items on your Preventive Maintenance Plan. LHA can reference the Property Maintenance Guide chapter 1, and the DHCD suggested Preventive Maintenance (PHN2016-18) to help establish its own Preventive Plan.

**Criteria N: 24 Emergency Response System, Distributed Emergency Definition to Residents, Staff, and Answering Service (if applicable) - No Findings**

- ☐ Create an Emergency System that Is Available 24 Hours a Day (if plan to procure, contact DHCD Compliance Specialist (#617-573-1100 or dhcd-publichousingprocurement@massmail.state.ma.us))
- ☐ Refer to Property Maintenance Guide (Pages I-5 to I-10) on Emergencies and System Setup See Handout B
- ☐ LHA should create a list of emergency items and distribute to all staff, tenants and answering service if have one. Produce emergency work orders for any work that is on your emergency list and initiate work within 24 to 48 hours. See Handout J

**Additional Notes:**