Notice of Public Hearing

The West Newbury 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: 9:00 am on 06/28/2023

Hearing location: West Newbury Housing Authority
379 Main Street
West Newbury, MA 01985

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).

- Copies of the Annual Plan are available at the Authority's office or may be reviewed online at https://tinyurl.com/LHA-MA-AnnualPlan
- 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.
- For reasonable accommodation requests contact the housing authority office by 06/24/2023 at 5:00 PM.
- Contact information for West Newbury Housing Authority:
  Office: 379 Main Street, West Newbury, MA 01985
  Phone: (978) 363-2723
  Email: tmwatson@nhahousing.com

Detailed Instructions for Remote Access

Annual Plan Hearing

Jun 28, 2023, 9:00?–?9:30?AM (America/New_York)
Please join my meeting from your computer, tablet or smartphone.

https://meet.goto.com/880055437
You can also dial in using your phone.

Access Code:

880-055-437

United States (Toll Free):

1 877 309 2073

United States:

+1 (646) 749-3129

Aviso de audiencia pública

El/La West Newbury 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: 9:00 am del 06/28/2023

Lugar de la audiencia: West Newbury Housing Authority
379 Main Street
West Newbury, MA 01985

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).

- 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.
- 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.
- Si tiene una solicitud razonable en relación con una discapacidad, póngase en contacto con la oficina de la autoridad de vivienda antes del 06/24/2023 a las 5:00 PM.
- Información de contacto de West Newbury Housing Authority:
  Oficina: 379 Main Street, West Newbury, MA 01985
  Teléfono: (978) 363-2723
  Correo electrónico: tmwatson@nhahousing.com

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សេចក្តីជូនដំណឹងអំពីសវនាការសាធារណៈ

West Newbury Housing Authority អញ្ជើញអ្នកជួល និងសាធារណជនទូទៅទាំងអស់ឲ្យទៅពិនិត្យមើលឡើងវិញនូវផែនការប្រចាំឆ្នាំដែលបានដាក់ស្នើរបស់អាជ្ញាធរសម្រាប់ឆ្នាំសារពើពន្ធ 2024

ផែនការប្រចាំឆ្នាំមានគោលបំណងផ្តល់ការយល់ដឹងអំពីប្រតិបត្តិការ និងផែនការរបស់អាជ្ញាធរសម្រាប់ឆ្នាំសារពើពន្ធខាងមុខនេះ ព្រោះវាប៉ះពាល់ដល់លំនៅដ្ឋានសាធារណៈដែលជួយដោយរដ្ឋរបស់អាជ្ញាធរ។ ផែនការប្រចាំឆ្នាំដែលបានដាក់ស្នើ មានធាតុដូចខាងក្រោម៖

1. ផែនការកែលម្អរដ្ឋធានីដែលបានដាក់ស្នើ (5 ឆ្នាំ)
2. ផែនការជួសជុល និងថែទាំដែលបានដាក់ស្នើ
3. ថវិកាប្រតិបត្តិការបច្ចុប្បន្ន
4. ការឆ្លើយតបនឹងលទ្ធផលនៃការពិនិត្យមើលឡើងវិញនូវការគ្រប់គ្រងការបំពេញការងារ (PMR)
5. បញ្ជីគោលនយោបាយអាជ្ញាធរលំនៅដ្ឋាន
6. បញ្ជីការលះបង់សិទ្ធិពីបទប្បញ្ញត្តិគ្រប់គ្រងរបស់ក្រសួងអភិវឌ្ឍសហគមន៍ និងលំនៅដ្ឋាន (DHCD)
7. ធាតុផ្សេងទៀត

កាលបរិច្ឆេទ និងម៉ោងសវនាការ៖ **9:00 am នៅ 06/28/2023**

ទីកន្លែងសវនាការ៖ West Newbury Housing Authority
379 Main Street
West Newbury, MA 01985

គេហជន និងសាធារណជនទូទៅត្រូវបានអញ្ជើញឱ្យពិនិត្យមើលឡើងវិញនូវផែនការប្រចាំឆ្នាំមុនពេលបើកសវនាការ ហើយអាចបញ្ជូនមតិសាធារណៈដូចបានកត់សម្គាល់ខាងក្រោម។ អាជ្ញាធរត្រូវតែគិតគូរពីកង្វល់នានារបស់អង្គការរបស់អ្នកជួលក្នុងមូលដ្ឋាន (LTO) ឬក្រុមប្រឹក្សាយោបល់គេហជន (RAB) អំពីតម្រូវការ និងអាទិភាពនានា ហើយបញ្ចូលតម្រូវការ និងអាទិភាពទាំងនោះមួយចំនួន ឬទាំងអស់ទៅក្នុងសេចក្តីព្រាងផែនការ បើអាជ្ញាធរយល់ថាសមស្របជាមួយការគ្រប់គ្រងដែលត្រឹមត្រូវ។ មតិសំខាន់ៗនឹងត្រូវបានសង្ខេប និងបញ្ចូលទៅក្នុងផែនការប្រចាំឆ្នាំ នៅពេលវាត្រូវបានដាក់ជូនក្រសួងអភិវឌ្ឍសហគមន៍ និងលំនៅដ្ឋាន (DHCD)។

- សេចក្តីចម្លងនៃផែនការប្រចាំឆ្នាំ មាននៅការិយាល័យរបស់អាជ្ញាធរ ឬអាចពិនិត្យមើលឡើងវិញលើបណ្តាញតាមរយៈ <https://tinyurl.com/LHA-MA-AnnualPlan>។ មានជាភាសាអង់គ្លេសតែប៉ុណ្ណោះ។
- មតិនានាអាចត្រូវបានផ្តល់ដោយផ្ទាល់មាត់នៅក្នុងសវនាការ ដោយផ្ញើអ៊ីមែលទៅការិយាល័យអាជ្ញាធរលំនៅដ្ឋាន ឬដោយដាក់មតិជាលាយលក្ខណ៍អក្សរនៅការិយាល័យអាជ្ញាធរលំនៅដ្ឋាន។ មតិនានាត្រូវតែផ្ញើដល់ឱ្យបានមុនពេលបិទសវនាការសាធារណៈ។
- សម្រាប់សំណើសុំការស្នាក់នៅសមរម្យ សូមទាក់ទងការិយាល័យអាជ្ញាធរលំនៅដ្ឋានត្រឹមថ្ងៃ 06/24/2023 នៅម៉ោង 5:00 PM។
- ព័ត៌មានទំនាក់ទំនងសម្រាប់ West Newbury Housing Authority៖

ការិយាល័យ៖ 379 Main Street, West Newbury, MA 01985
ទូរស័ព្ទ៖ (978) 363-2723
អ៊ីមែល៖ tmwatson@nhahousing.com

Detailed Instructions for Remote Access

Annual Plan Hearing

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Thông báo Điều trần Công khai

West Newbury 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: 9:00 am và 06/28/2023

Địa điểm điều trần: West Newbury Housing Authority
379 Main Street
West Newbury, MA 01985

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).

- 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.
- 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.
- Để đưa ra các yêu cầu về biện pháp điều chỉnh đặc biệt hợp lý, hãy liên hệ với văn với văn phòng cơ quan quản lý gia cư trước 06/24/2023 lúc 5:00 PM.
- Thông tin liên hệ cho West Newbury Housing Authority:
  Văn phòng: 379 Main Street, West Newbury, MA 01985
  Điện thoại: (978) 363-2723
  Email: tmwatson@nhahousing.com

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开公众听证会的通知

West Newbury 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: 9:00 am 在 06/28/2023

听证会地点：West Newbury Housing Authority
379 Main Street
West Newbury, MA 01985

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 06/24/2023 之前通过 5:00 PM 与住房管理局的办公室联系。
- West Newbury Housing Authority 的联系方式：

  办公室： 379 Main Street, West Newbury, MA 01985
  电话: (978) 363-2723
  电子邮件: tmwatson@nhahousing.com

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Aviso de Audiência Pública

O West Newbury 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: 9:00 am em 06/28/2023

Local da audiência: West Newbury Housing Authority
379 Main Street
West Newbury, MA 01985

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 06/24/2023 às 5:00 PM.
- Informações de contato para West Newbury Housing Authority:
  Escritório: 379 Main Street, West Newbury, MA 01985
  Telefone: (978) 363-2723
  E-mail: tmwatson@nhahousing.com

Detailed Instructions for Remote Access

Annual Plan Hearing

Jun 28, 2023, 9:00?–?9:30?AM (America/New_York)
Please join my meeting from your computer, tablet or smartphone.

https://meet.goto.com/880055437
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Access Code:

880-055-437

United States (Toll Free):

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United States:

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Уведомление о публичном слушании

West Newbury Housing Authority приглашает всех жильцов и представи общественности принять участие в рассмотрении предлагаемого Жили 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 бюдж;
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: 9:00 am Дата слушания 06/28/2023

Место проведения слушания: West Newbury Housing Authority
379 Main Street
West Newbury, MA 01985

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).

- Копии Годового плана можно получить в офисе Жилищного управления или на сайте: <https://tinyurl.com/LHA-MA-AnnualPlan>. Документы доступны только на английском языке.
- 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.
- Разумные запросы о размещении можно направить в офис Жилищного управления до 06/24/2023 5:00 PM.
- Контактная информация West Newbury Housing Authority:
  Офис: 379 Main Street, West Newbury, MA 01985
  Телефон: (978) 363-2723
  Адрес эл. почты: tmwatson@nhahousing.com

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Avi Odisyon Piblik

The West Newbury 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 egzonerasyon 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: 9:00 am nan dat 06/28/2023

Adrès odisyon an: West Newbury Housing Authority
379 Main Street
West Newbury, MA 01985

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 nesesè 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 06/24/2023 a 5:00 PM.
- Enfòmasyon kontak pou West Newbury Housing Authority:
  Biwo: 379 Main Street, West Newbury, MA 01985
  Telefòn: (978) 363-2723
  Imèl: tmwatson@nhahousing.com

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West Newbury 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 West Newbury 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

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	HILLS / BOYNTON COURT 705-01	6	1992	12
667-01	Elderly	Main Street 667-01	1	1988	14
Total			7		26

LHA Central Office

West Newbury Housing Authority
379 Main Street, West Newbury, MA, 01985
Tracy Watson, Management Agent
Phone: 978-363-2723
Email: tmwatson@nhahousing.com

LHA Board of Commissioners

	Role	Category	From	To
Gary Bill	Vice-Chair		05/01/2019	05/01/2024
Richard Miller	Chair		05/01/2021	05/01/2026
Leisa Mingo		State Appointee	09/23/2019	09/23/2024
Marjorie Peterson	Member		05/01/2021	05/01/2026
Mary Lou Sayers			08/08/2022	06/30/2027

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.	05/04/2023
B.	Advertise the public hearing in public postings.	05/04/2023
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.	05/04/2023
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.)	06/28/2022
G.	Executive Director presents the Annual Plan to the Board.	05/17/2022
H.	Board votes to approve the AP. (For Boston Housing Authority, the Administrator approves and submits the AP.)	06/28/2022

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

Capital Improvement Plan

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

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

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

The CIP includes the following parts:

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

Additional Remarks by West Newbury Housing Authority

Main Street received a new parking lot.

Main Street units will all receive new flooring

Hills Court will receive new windows.

Back landings have been replaced as well HIlls Court

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)	$429,030.47		Total of all FF awards minus prior FF spending
LHA Emergency Reserve	$42,903.05		Amount to reserve for emergencies
Net FF Funds (First 3 Years of the CIP)	$386,127.42	$307,614.63	Funds to plan & amount actually planned in the first 3 years of the CIP
ADA Set-aside	$867.90	$0.00	Accessibility projects
DMH Set-aside	$0.00	$0.00	Dept. of Mental Health facility
DDS Set-aside	$0.00	$0.00	Dept. of Developmental Services facility
Unrestricted Formula Funding (FF)	$385,259.52	$307,614.63	Funds awarded by DHCD to be used on projects selected by the LHA and approved by DHCD.
Special DHCD Funding	$27,125.90	$27,125.90	Targeted awards from DHCD
Community Development Block Grant (CDBG) Funds	$0.00	$0.00	Federal funds awarded by a city or town for specific projects.
Community Preservation Act (CPA) Funds	$0.00	$0.00	Community Preservation Act funds awarded by a city of town for specific projects.
Operating Reserve(OR) Funds	$0.00	$0.00	Funds from the LHA's operating budget.
Other Funds	$69,461.01	$69,461.01	Funds other than those in the above categories. See explanation below.
Total funds and planned spending	$482,714.34	$404,201.55	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.

Regional Capital Assistance Team

West Newbury 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 2023	fy2024 Planned	fy2025	fy2026	fy2027	fy2028
308008	2008 FF Master CFA	Main Street 667-01	$4,200	$1,200	$1,711	$761	$529	$0	$0	$0
308035	FF: Roof replacement	HILLS / BOYNTON COURT 705-01	$105,490	$101,495	$3,995	$0	$0	$0	$0	$0
308036	Asphalt paving	Main Street 667-01	$175,409	$146,710	$26,324	$0	$0	$0	$0	$0
308042	HILAPP- West Newbury	HILLS / BOYNTON COURT 705-01	$663,980	$288,461	$0	$0	$0	$0	$0	$0
308045	Rear stair/deck replacement	HILLS / BOYNTON COURT 705-01	$26,195	$0	$2,901	$0	$0	$0	$0	$0
308046	ARPA FF Unit Carpet Replacement	Main Street 667-01	$123,311	$0	$4,927	$48,922	$0	$0	$0	$0
308047	Window Replacement Phase 1(HILLS)	HILLS / BOYNTON COURT 705-01	$125,281	$0	$10,123	$78,585	$0	$0	$0	$0
•	Heating controls updates	Main Street 667-01	$12,856	$0	$0	$12,856	$0	$0	$0	$0
•	Walkway behind building	Main Street 667-01	$17,669	$0	$0	$0	$17,669	$0	$0	$0
•	Window replacement	Main Street 667-01	$107,795	$0	$0	$0	$60,129	$47,667	$0	$0
•	Window Replacement Phase 2 (BOYNTON)	HILLS / BOYNTON COURT 705-01	$117,809	$0	$0	$0	$0	$25,681	$92,129	$0
•	Siding Replace Phase 1	HILLS / BOYNTON COURT 705-01	$143,369	$0	$0	$0	$0	$0	$0	$78,933
•	Hazardous tree removal	HILLS / BOYNTON COURT 705-01	$12,856	$0	$0	$12,856	$0	$0	$0	$0

Capital Improvement Plan (CIP)

FUNDS IN ADDITION TO ANNUAL FORMULA FUNDING AWARD

Cap Hub Project Number	Project Name	DHCD Special Award Comment	Special DHCD Awards				Other Funding			
			Emergency Reserve	Compliance Reserve	Sustain-ability	Special Awards	CDBG	CPA	Operating Reserve	Other Funds
308042	HILAPP- West Newbury	Kichen & Bath renovation	$0	$0	$0	$300,613	$0	$363,367	$0	$0
308046	ARPA FF Unit Carpet Replacement	ARPA Formula Funding	$0	$0	$0	$0	$0	$0	$0	$69,463
308047	Window Replacement Phase 1(HILLS)	window replacement	$0	$0	$0	$14,973	$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.

   West Newbury Housing Authority has not submitted an Alternate 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.

   West Newbury Housing Authority has not requested additional funding.

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

   WNHA plans to continue to work on building envelope issues at the family developments as well as several smaller issue that have come up lately.

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:

   West Newbury Housing has created a few new projects related to heating issues, walkways, and tree issues.

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 03/31/2023.

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 04/05/2023.

8. Project priorities

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

9. High priority deficiencies

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

10. Accessibility

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

11. Special needs development

West Newbury Housing Authority does not have a special needs (167 or 689 programs) development.

12. Energy and water consumption

Our 12 most recent monthly energy reports are for months 1/2022 to 12/2022.

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

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

705-01

Water usage is high at the 705 developments. The recently completed kitchen and bath project will likely help and show a reduction in this usage in the coming year.

13. Energy or water saving initiatives

West Newbury 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-West Newbury Housing Auth-00847 had an energy audit under the Low-Income Energy Affordability Network (LEAN) program on 11/01/2019

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.)

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

Maintenance and Repair Plan

Maintenance Objective

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

About This Maintenance and Repair Plan

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

a. **Classification and Prioritization of Maintenance Tasks** - Defines and prioritizes types of work to be accomplished by maintenance staff and vendors. Explains how the housing authority is expected to respond to work orders (tasks or requests) based on the work order classification.

b. **Emergency Response System** - Defines what constitutes an emergency and how to notify staff of an emergency.

c. **Normal Maintenance Response System** - How to contact the maintenance staff for a non-emergency request.

d. **Work Order Management** - Description of the housing authority's system for managing work orders (tasks and requests).

e. **Maintenance Plan Narrative & Policy Statement** - Self-assessment, basic information, and goals for the coming year, along with a description of the housing authority's maintenance program.

f. **Preventive Maintenance Schedule** - A listing and schedule of tasks designed to keep systems and equipment operating properly, to extend the life these systems and equipment, and to avoid unexpected breakdowns.

g. **Routine Maintenance Schedule** - A listing and schedule of ordinary maintenance tasks such as mopping, mowing, raking, and trash collection required to keep the facilities in good condition.

h. **Unit Inspections** - Scheduling of annual unit inspections.

Classification and Prioritization of Maintenance Tasks

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

I. **Emergencies** - Emergencies are only those conditions which are **immediately threatening** to the life or safety of our residents, staff, or structures.
   - **Goal: initiated with 24 to 48 hours.**

II. **Vacancy Refurbishment - Work necessary to make empty units ready for new tenants.**
   - After emergencies, the refurbishment of vacancies for immediate re-occupancy has the highest priority for staff assignments. **Everyday a unit is vacant is a day of lost rent.**
   - **Goal: vacancy work orders are completed within 30 calendar days or if not completed within that timeframe, LHA has a waiver.**

III. **Preventive Maintenance** - Work which must be done to **preserve and extend the useful life** of various elements of your physical property and avoid emergency situations.
   - A thorough Preventive Maintenance Program and Schedule that deals with all elements of the physical property is provided later in the document.
   - The Preventive Maintenance Program is reviewed and updated annually and as new systems and facilities are installed.

IV. **Programmed Maintenance** - Work which is important and is completed to the greatest extent possible within time and budget constraints. Programmed maintenance is grouped and scheduled to make its completion as efficient as possible. Sources of programmed maintenance include:
   - Routine Work includes those tasks that need to be done on a regular basis to keep our physical property in good shape. (Mopping, Mowing, Raking, Trash, etc.)
   - Inspections are the other source of programmed maintenance.
     - Inspections are visual and operational examinations of parts of our property to determine their condition.
     - All dwelling units, buildings and sites must be inspected at least annually.
     - **Goal: Inspection-generated work orders are completed within 30 calendar days from the date of inspection, OR if cannot be completed within 30 calendar days, are added to the Deferred Maintenance Plan or the Capital Improvement Plan in the case of qualifying capital repairs (unless health/safety issue).**

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

Emergency Request System

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

METHOD	CONTACT INFO.	TIMES
Call Answering Service	(978) 363-2723	24/7/365
Call LHA at Phone Number	(978) 363-2723	24/7/365
Other	978.465.7216	Newburyport Housing Authority - main

Residents should call 911 in any life threatening situations.

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 West Newbury Housing Authority main office.

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

Normal Maintenance Request Process

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

METHOD	CONTACT INFO.	TIMES
Text Phone Number		
Call Answering Service	(978) 363-2723	24/7/365
Call Housing Authority Office	(978) 363-2723	24/7/365
Submit Online at Website		
Email to Following Email	nha@nhahousing.com	
Other		

Work orders are called in, emailed, or dropped at office by note.
Work order is generated in a hard copy paper form from PHA Web
Maintenance picks up, completes work and returns hard copy to the office.
Office administration then completes the work order in PHA Web and files hard copy.

Work Order Management

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

Type of work order system:

Work order classification used:

Emergency	
Vacancy	
Preventative Maintenance	
Routine	
Inspections	
Tenant Requests	

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

C. Our work order process includes the following steps:

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

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

PHA Web

Maintenance Plan Narrative

Following are West Newbury 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 have currently sent out a survey to residents -- specifically asking regarding maintenance operations. Most residents returned them with high marks for maintenance.

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

None

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

Landscaping

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	$47,014.00	$47,170.00
Last Fiscal Year Actual Spending	$55,739.00	$32,867.00
Current Fiscal Year Budget	$54,889.00	$20,000.00

E. Unit Turnover Summary

# Turnovers Last Fiscal Year	4
Average time from date vacated to make Unit "Maintenance Ready"	82 days
Average time from date vacated to lease up of unit	101 days

Attachments

These items have been prepared by the West Newbury 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.

WEST NEWBURY HOUSING AUTHORITY
PREVENTATIVE MAINTENANCE PROGRAM

Preventive maintenance is part of the planned or scheduled maintenance program of the Housing Authority. The purpose of the scheduled maintenance program is to allow the Authority to anticipate maintenance requirements and make sure the Authority can address them in the most cost-effective manner. The preventive maintenance program focuses on the major systems that keep the properties operating. These systems include heating and air conditioning, electrical, life safety and plumbing.

General Operating Systems

The heart of any preventive maintenance program is a schedule that calls for the regular servicing of all systems. The development of this schedule begins with the identification of each system or item that must be checked and serviced, the date it must be serviced, and the individual responsible for the work. The servicing intervals and tasks for each system must be included in the schedule. The completion of all required tasks is considered a high priority for the Housing Authority.

The systems covered by the preventive maintenance program include but are not limited to:

1. HVAC SYSTEMS

A. boilers
B. circulators
C. domestic hot water tanks

2. SECURITY SYSTEMS

A. exterior lighting
B. public hallway lighting
C. building doors and locks

3. FIRE AND LIFE SAFETY SYSTEMS

A. emergency generators
B. fire extinguishers
C. emergency lighting/exit lights
E. sprinkler systems
F. fire alarm systems

4. ROOFS
A. roof inspection
B. gutter cleaning

5. ELEVATORS
A. elevator inspection

6. PLUMBING
A. catch basins
B. sanitary drains

7. VEHICLES
A. safety inspection
B. tune up
C. fluid check

8. ANNUAL INSPECTIONS
A. dwelling units
B. site
C. building systems
D. common areas

9. MECHANICAL EQUIPMENT

A. sump pumps

10. COMMON AREAS
A. grounds
B. hallways and stairwells
C. community rooms and rest rooms

11. PEST CONTROL

The following preventative maintenance should be done on monthly basis:

1. **Vehicle Inspection:**
   - Check all fluid levels: crank case, transmission, etc.
   - Check antifreeze, radiator rust inhibiter and thermostat.
   - Check windshield washer fluid.
   - Check belts and hoses.
   - Check plugs, wiring, battery, clean and grease terminals.
   - Clean out air cleaner.
   - Check wheel alignment and tire balance (signs of uneven wear).
   - Check heater and defroster.
   - Check wiper blades for wear.
   - Check underbody for corrosion and hose off.
   - Change engine oil in all vehicles. (1st quarter)

2. **Check smoke detectors and carbon monoxide detectors during annual inspections.**

3. **Unit inspections – schedule so as to complete 100% each year.**
   - It is required that inspections be completed annually by an administrative staff member, the executive director, maintenance staff employee or hired agency. This will ensure that the authority become aware of the property conditions and any lease enforcement issues.

   - It is recommended that you inspect a manageable number of units each month which allows for all maintenance deficiencies to be completed within the timeframe stated in theDHCD Property Maintenance Guide (PMG), two weeks.

4. **Inventory of supplies and small parts.**

5. **Clean storage rooms and maintenance areas.**

6. **Clean/disinfect dumpster areas.**

January Preventative Maintenance Task

1. Monitor and issue on-going snow removal work orders.

2. Hot air furnace / Boiler winter PM.

3. Oil circulator pumps.

4. Clean dryer vents.

5. Inventory tools, equipment, refrigerators and stoves in stock.

6. Lease enforcement: Residents are responsible for snow removal from front and rear egress of their unit only if they have instances where a dwelling has an independent means of egress, not shared with other occupants, and a written letting agreement so states, the occupant is responsible for maintaining free of snow and ice, the means of egress under his or her exclusive use and control..

7. Keep all chimneys, exhaust and intake vents free of snow throughout the winter season and keep dryer exhaust vents free of snow throughout the winter season.
   - Blocked chimneys, exhaust vents and intake vents could result in carbon monoxide poisoning and can affect the performance of the furnace.

February Preventative Maintenance Task

1. Monitor and issue on-going snow removal work orders.

2. A/C, heat and air handler filter change.

3. Clean sanitary systems, lubricate valves and pumps.

4. Clean and lubricate trash chutes and doors.

5. Strip, wax and buff vinyl composite tile (VCT) and linoleum flooring.

6. Clean/disinfect compactors and trash chutes.

7. Lease enforcement: Clear common hallways and stairs free from all obstructions. (PHN 2012-12)According to the State Sanitary code 105 CMR 410.451 - No person shall obstruct any exit or passageway. The owner is responsible for maintaining free from obstruction every exit used or intended for use by occupants of more than one dwelling unit or rooming unit. The occupant shall be responsible for maintaining free from obstruction all means of exit leading from his unit and not common to the exit of any other unit.

8. Keep all chimneys, exhaust and intake vents free of snow throughout the winter season and keep dryer exhaust vents free of snow throughout the winter season. Blocked chimneys, exhaust vents and intake vents could result in carbon monoxide poisoning and can affect the performance of the furnace.

March Preventative Maintenance Task

1. Second Monday, reset light timers and clocks for daylight saving time.

2. Monitor and issue on-going snow removal work orders.

3. Touch up all common area paint.

4. Clean heater vents in all common areas.

5. Lease enforcement: Furniture, trash and debris free from exteriors.

6. Keep all chimneys, exhaust and intake vents free of snow throughout the winter season and keep dryer exhaust vents free of snow throughout the winter season.
   - Blocked chimneys, exhaust vents and intake vents could result in carbon monoxide poisoning and can affect the performance of the furnace.

April Preventative Maintenance Task

1. Fire extinguisher annual recertification.

2. Inspect all entry doors.

3. Clean dryer vents, exhaust vents and roof vent motors.

4. Service lawn equipment.

5. Inspect roofs and siding.

6. Clean common area flooring and carpeting.

7. Cleaning of parking areas, roadways, driveways, walkways and storm drains.

8. Inspect trees and trim as needed (maintain 10ft distance from buildings).

9. Check smoke detectors and carbon monoxide detectors during annual inspections.
10. Lease enforcement: Check for proper AC installation (according to policy)

May Preventative Maintenance Task

1. Clean all manholes.

2. Emergency generator PM.

3. Clean A/C condensers.

4. Sidewalk and parking lot crack and crevice sealing and repair.

5. Weed treatment at all sites.

6. Edge and mulch all planting beds.

7. Prune/trim all shrubs and bushes away from buildings (maintain 2ft clearance from all structures).

8. Fertilize lawns.

9. Lease enforcement: Cooking grills and fire pits (according to policy)

- DHCD recommends the ban of fire pits on all public housing property. There is extreme risk to life and safety with the unsupervised use of fire pits.
- All cooking grills should be used a minimum of 10 feet from all structures.

June Preventative Maintenance Task

1. Summer boiler shut-down and PM service. (Non-heating season June 16th to September 14th).

2. Change A/C, heat and air handler filters.

3. Check interior emergency lighting.

4. Weed and edge all planting beds every 2 weeks (June 1st to Oct 1st).

5. Inspect site railings, walkways and stairs for potential hazards. Identify and repair, as needed.

6. Edge and mulch all planting beds.

7. Check flags and replace as needed.

8. Lease enforcement:
   - Pools, trampolines and swing-sets (according to policy, see PHN 2003-04)
   - Furniture, trash and debris free from exterior.

July Preventative Maintenance Task

1. Clean dryer vents, exhaust vents and roof vent motors.
2. Inspect gutters, downspouts and splash blocks – repair as needed.
3. Inspect common area windows (glass, seals, balances and locks).
4. Inspect and repair site fencing.
5. Lease enforcement: Pet Policy (according LHA Approved Pet Policy).

August Preventative Maintenance Task

1. Make up air units PM.
2. Strip, wax and buff VCT and linoleum flooring.
3. Lease enforcement: Common hallways and stairs free from all obstructions. (PHN 2012-12)
   - According to the State Sanitary code 105 CMR 410.451 - No person shall obstruct any exit or passageway. The owner is responsible for maintaining free from obstruction every exit used or intended for use by occupants of more than one dwelling unit or rooming unit. The occupant shall be responsible for maintaining free from obstruction all means of exit leading from his unit and not common to the exit of any other unit.

September Preventative Maintenance Task

1. Check electrical panels in boiler rooms and all common areas.
2. Domestic hot water systems PM.
3. Boiler tune-up. (Heating season is September 15th through June 15th)
4. Clean storage rooms and maintenance areas.
5. Touch up all common area paint.
6. Clean heater vents in all common areas.
7. Lease enforcement: Removal of all AC's (according to policy)

October Preventative Maintenance Task

1. October 7th through the 13th – Fire Prevention Month – Perform PM and check all fire systems, sprinklers, fire pumps, fire extinguishers, common area egress, etc.

2. Annual cleaning of septic systems.

3. Annual sewer station PM.

4. Boiler tune-up. (Heating season is September 15th through June 15th)

5. Change A/C, heat and air handler filters.

6. Annual cleaning of all gutters.

7. Leaf removal.

8. Prune and trim all shrubs and bushes. (maintain 2ft clearance from all structures)

9. Fertilize lawns.

10. Buy and stock ice melt for winter.

11. Clean dryer vents, exhaust vents and roof vent motors.

12. Service snow blowers.

13. Cleaning of parking areas, roadways, driveways, walkways and storm drains.

14. Clean, service and store lawn equipment.

15. Lease enforcement: Decorations (Halloween) cords running through doors and windows.
    a. Inspect all basements for proper clearance from heating systems (5ft).
    b. Fire prevention notices to tenants.

November Preventative Maintenance Task

1. First Friday in November reset light timers and clocks back 1 hour for daylight saving time.

2. Monitor and issue on-going snow removal work orders.

3. Inspect trees and trim as needed (maintain 10ft clearance from all structures).

4. Clean common area carpets and flooring.

5. Lease enforcement: Blocked egresses.

6. Keep all chimneys, exhaust and intake vents free of snow throughout the winter season and keep dryer exhaust vents free of snow throughout the winter season.
   - Blocked chimneys, exhaust vents and intake vents could result in carbon monoxide poisoning and can affect the performance of the furnace.

December Preventative Maintenance Task

1. Monitor and issue on-going snow removal work orders.

2. Check and replace flags as needed.

3. Lease enforcement: Decorations (Christmas) Cords running through doors and windows.

4. Keep all chimneys, exhaust and intake vents free of snow throughout the winter season and keep dryer exhaust vents free of snow throughout the winter season.
   - Blocked chimneys, exhaust vents and intake vents could result in carbon monoxide poisoning and can affect the performance of the furnace.

WEST NEWBURY HOUSING AUTHORITY MAINTENANCE PLAN

The West Newbury Housing Authority Maintenance Department is responsible for managing the maintenance function in the most cost effective manner possible while maximizing the useful life of Authority properties and providing the best service to Authority residents. The following policy statements are designed to establish the structure of an effective and efficient maintenance system

1. MAINTENANCE SYSTEM

The West Newbury Housing Authority maintenance system shall include certain components:
A. A system of priorities for work requests;
B. Comprehensive working procedures;
C. Performance goals;
D. A work order system;
E. A skills training program

PRIORITY SYSTEM

The work priorities adopted by the West Newbury Housing Authority exemplify its philosophy of delivering maintenance services. This priority system ensures that the most important maintenance work is done at a time it can be performed most cost-effectively. Minimizing vacancy loss is part of the cost-effectiveness calculation. The maintenance priorities of the West Newbury Housing Authority are the following:

A. Emergencies – Conditions which are immediately threatening to the life or safety of our residents, staff or structures.

B. Vacancies- work necessary to make empty units ready for new residents.

C. Preventive Maintenance- work which must be done to preserve and extend the useful life of various elements of the physical property.

D. Programmed Maintenance-types of programmed maintenance include inspection generated work orders and routine work orders. Programmed maintenance will be grouped and scheduled to make the completion as efficient as possible.

E. Requested Maintenance – work which is requested by residents or others, does not fall into any category above and will be accomplished as time and funds are available.

**** Placing planned maintenance and vacancy preparation work ahead of resident work requests does not indicate that resident requests are unimportant. It emphasizes the importance of maintaining control of the maintenance work by performing scheduled routine and preventive work first. By doing so the Authority will decrease on-demand work and maintain the property in a manner that will keep and attract good tenants.****

DEVELOP PROCEDURES

The Maintenance Supervisor will ensure that there are sufficient clear procedures in place to allow staff to implement this maintenance policy statement, which shall include but not limited to:

A. The job title(s) of the staff member(s) responsible for carrying out the activities in the procedure;
B. Any forms needed to carry out the activities; and
C. The frequency of any specified activities.

Maintenance procedures will be reviewed and updated as needed.

DEVELOP PERFORMANCE STANDARDS AND GOALS

The Maintenance Supervisor will establish measures that will allow the effectiveness of maintenance systems and activities to be evaluated. In establishing these standards the Housing Authority will take into consideration certain factors:

A. Local housing codes; DHCD Guidelines
B. HUD Housing Quality Standards;
C. Public Housing Assessment System (PHAS) standards;
E. NewburyportHousing Authority job descriptions.

Nothing in the documents listed above will prevent the Housing Authority from setting a standard that is higher than that contained in the documents.

WORK ORDER SYSTEM/PROCEDURE (see Addendum A)

The West Newbury Housing Authority shall have a comprehensive work order system/procedure that includes all work request information: source of work, description of work, priority, cost to complete, days to complete, and hours to perform. This information is required for the Authority to plan for the delivery of maintenance services as well as evaluate performance. To obtain the greatest effectiveness from the work order system, all work requests and activities performed by maintenance staff must be recorded on work orders.

Work orders will contain, at a minimum, the following information:

A. Preprinted number
B. Source of request (planned, inspection, resident, etc.)
C. Priority assigned
D. Location of work
E. Date and time received
F. Date and time assigned
G. Worker(s) assigned
H. Description of work requested
I. Description of work performed
J. Estimated and actual time to complete
K. Materials used to complete work
L. Resident charge
M. Resident signature

TRAINING

In order to allow its staff members to perform to the best of their abilities, the West Newbury Housing Authority recognizes the importance of providing the staff with opportunities to refine technical skills, increase and expand craft skills, and learn new procedures.

2. MAINTAINING THE PROPERTY

All maintenance work performed at Housing Authority properties can be categorized by the source of the work. Each piece of work originates from either anemergency, routine maintenance schedule, preventive maintenance schedule, unit inspection, unit turnover, or a resident request.

RESPONDING TO EMERGENCIES

Emergencies are the highest priority source of work. The West Newbury Housing Authority will consider a work item to be an emergency if the following occur:

A. The situation constitutes a serious threat to the life, safety or health of residents or staff; or

B. The situation will cause serious damage to the property structure or systems if not repaired twenty-four (24) hours.

If a staff member is unsure whether or not a situation is an emergency, he or she will consult with his or her supervisor. If a supervisor is not available, the employee will use his or her best judgment to make the decision.

For emergencies that occur after regular working hours, the West Newbury Housing Authority shall have a twenty-four (24) emergency response system in place. This response system includes the designation of a maintenance employee in charge for each day as well as a list of qualified pre-approved contractors, open purchase orders for obtaining required supplies or equipment, and access to Authority materials and supplies. The designated employee shall prepare a work order and report on any emergency within twenty-four hours after abatement of the emergency.

PREPARE VACANT UNITS FOR REOCCUPANCY

It is the policy of the West Newbury Housing Authority to reoccupy vacant units as soon as possible. This policy allows the Authority to maximize the income produced by its properties and operate attractive and safe properties.

The Maintenance Supervisor is responsible for developing and implementing a system that ensures an average turn-around time of calendar (14) calendar days or sooner. In order to do so, he or she must have a system that can perform the following tasks:

A. Forecast unit preparation needs based on prior years' experience;
B. Estimate both the number of units to be prepared and the number of hours it will take to prepare them; and
C. Control work assignments to ensure prompt completion.

The maintenance procedure for reoccupying vacant units relies on the prompt notification by management of the vacancy, fast and accurate inspection of the unit, ready availability of workers and materials, and good communication with those responsible for leasing the unit. The West Newbury Housing Authority has established a Vacancy Procedure. **(see Addendum B)**

The Maintenance Supervisor has the ability to hire contractors when that is required to maintain Authority goals with approval of the Executive Director.

PREVENTIVE MAINTENANCE PROGRAM

Preventive maintenance is part of the planned or scheduled maintenance program of the West Newbury Housing Authority. The purpose of the scheduled maintenance program is to allow the Authority to anticipate maintenance requirements and make sure the Authority can address them in the most cost-effective manner. The preventive maintenance program focuses on the major systems that keep the properties operating. These systems include heating and air conditioning, electrical, life safety and plumbing. **(see Addendum C)**

INSPECTION PROGRAM

The West Newbury Housing Authority's goals of efficiency and cost-effectiveness are achieved through performance of inspections of all areas of the Authority's facilities -- dwelling units, grounds and building exteriors, and major service systems.

A. Dwelling Unit Inspections

The unit inspection system of the West Newbury Housing Authority has two primary goals:

1. To assure that all dwelling units comply with standards set by DHCD and local codes; and

2. To assure that the staff of the West Newbury Housing Authority knows at all times the condition of each unit for which it is responsible.

The achievement of these goals may require more than the annual required inspection. For all non-emergency inspections, the Resident shall be given at least seven (7) days written notice of the inspection.

Work items noted at the time of the inspection will be documented on the West Newbury Housing Authority inspection form. All uncompleted work items shall be converted to a work order within twenty-four hours of the completion of the inspection. The maintenance staff shall endeavor to complete all inspection-generated work items within 30-60 days of the inspection.

All maintenance staff is responsible for monitoring the condition of dwelling units. Whenever a maintenance staff member enters a dwelling unit for any purpose, such as completing a resident request for service or accompanying a contractor, he or she shall record on an inspection form any required work he or she sees while in the apartment. These work items shall also be converted to a service request within twenty-four hours of discovery.

B. Building and Grounds Inspections

Regular inspections of the property grounds and building exteriors are required to maintain the curb appeal of the property. This curb appeal is required to maintain the attractiveness of the property for both current and prospective residents. Building and grounds inspections must cover these areas:

1. Hallways

2. Stairwells

3. Community room and other common space such as kitchens or public restrooms

4. Laundry facilities

5. Lobbies

6. Common entries

7. Basements

8. Grounds

9. Porches or patios

10. Parking lots

11. Sidewalks and fences

12. Lawns, shrubs and trees

13. Trash compactors or collection areas

14. Building foundations

The staff member responsible for the inspection shall note all deficiencies and ensure that these deficiencies are recorded on a work order within twenty-four hours of the inspection. The West Newbury Housing Authority will complete all inspection-generated work items within thirty (30) days of the inspection.

Nothing in this policy shall prevent any West Newbury Housing Authority staff member from reporting any needed work that they see in the regular course of their daily activities. Such work items shall be reported to the site manager of the appropriate property.

C. Systems Inspections

The regular inspection of all major systems is fundamental to a sound maintenance program. The major systems inspection program overlaps with the preventive maintenance program in some areas. To the extent that inspections, in addition to those required for scheduled service intervals, are needed, they will be a part of the inspection schedule. Any work items identified during an inspection shall be converted to a work order within twenty-four hours and completed within thirty (30) days.

SCHEDULED ROUTINE MAINTENANCE

The West Newbury Housing Authority includes in this work category all tasks that can be anticipated and put on a regular timetable for completion. Most of these routine tasks are those that contribute to the curb appeal and marketability of the property.

A. Pest Control/Extermination

The West Newbury Housing Authority will make all efforts to provide a healthy and pest-free environment for its residents. The Authority will determine which, if any, pests infest its properties and will then provide the best possible treatment for the eradication of those pests.

The Maintenance Supervisor will determine the most cost-effective way of delivering the treatments -- whether by contractor or licensed Authority personnel.

The extermination plan will begin with an analysis of the current condition at each property. The Maintenance Supervisor shall make sure that an adequate schedule for treatment is developed to address any existing infestation.

Resident cooperation with the extermination plan is essential. All apartments in a building must be treated for the plan to be effective. Residents will be given information about the extermination program at the time of move-in. All residents will be informed at least one week (when time allows and again twenty-four hours before treatment). The notification will be in writing and will include instructions that describe how to prepare the unit for treatment. If necessary, the instructions shall be bi-lingual to properly notify the resident population.

B. Landscaping and Grounds

The West Newbury Housing Authority will prepare a routine maintenance schedule for the maintenance of the landscaping and grounds of its properties that will ensure their continuing attractiveness and marketability. Routine grounds maintenance includes numerous activities, litter control, Lawn care, Maintenance of driveways, sidewalks and parking lots, Care of flower and shrubbery beds and trees, Maintenance of playgrounds, benches and fences and Snow removal (when required by climate).

C. Building Exteriors and Interior Common Areas

The appearance of the outside of Authority buildings as well as their interior common areas is important to their marketability. Therefore, the West Newbury Housing Authority has established a routine maintenance schedule to ensure that they are always maintained in good condition. The components to be maintained include, Lobbies, Hallways and stairwells, Elevators, Public restrooms, Lighting fixtures, Common rooms and community spaces, Exterior porches and railings, Building walls and windows.

D. Resident Generated Work Requests

These are non-emergency calls made by residents seeking maintenance service. These requests for service cannot be planned in advance or responded to before the resident calls.

It is the policy of the West Newbury Housing Authority to complete these work requests within seven (7) days. However, unless the request is an emergency or entails work that compromises the habitability of the unit, these requests will not be given a priority above scheduled routine and preventive maintenance. By following this procedure, the West Newbury Housing Authority believes it can achieve both good resident service and a maintenance system that completes the most important work first and in the most cost effective manner.

3. CONTRACTING FOR SERVICES

The West Newbury Housing Authority will contract for maintenance services when it is in the best interests of the Authority to do so. When the employees of the Authority have the time and skills to perform the work at hand, they will be the first choice to perform a given task. When the employees of the Authority have the skills to do the work required, but there is more work than there is time available to complete it, the Housing Authority will determine whether it is more cost effective to use a contractor to complete the work. If the Authority staff does not have the skills to complete the work, a contractor will be chosen. In the last instance, the Authority will decide whether it will be cost effective to train a staff member to complete the work.

Once the decision has been made to hire a contractor, the process set out in the West Newbury Housing Authority Procurement Policy will be used. These procedures vary depending on the expected dollar amount of the contract. The Maintenance Supervisor will work with the Executive Director to facilitate the contract award. The Executive Director will be responsible for the contribution of the Maintenance Department to this process. The most important aspect of the bid documents will be the specifications or statement of work. The clearer the specifications the easier it will be for the Authority to get the work product it requires.

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 09/30/2022. 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 West Newbury Housing Authority operating reserve at the end of fiscal year 2022 was $65,854.00, which is 63.9% 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 West Newbury Housing Authority.

REVENUE

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	$165,780.00	$174,675.00	$168,516.00	-3.5%	$540.12
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	$500.00	$25.00	$200.00	700%	$0.64
3691	Other Revenue - Retained	$8,060.00	$25,343.00	$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)	$21,903.00	$3,858.00	$28,901.00	649.1%	$92.63
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	$196,243.00	$203,901.00	$197,617.00	-3.1%	$633.39

Annual Operating Budget

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

EXPENSES

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	$2,000.00	$0.00	$2,000.00	100%	$6.41
4140	Members Compensation	$0.00	$0.00	$0.00	0%	$0.00
4150	Travel & Related Expenses	$1,212.00	$744.00	$1,212.00	62.9%	$3.88
4170	Accounting Services	$7,222.00	$7,212.00	$7,558.00	4.8%	$24.22
4171	Audit Costs	$3,150.00	$3,150.00	$3,780.00	20%	$12.12
4180	Penalties & Interest	$0.00	$0.00	$0.00	0%	$0.00
4190	Administrative Other	$42,442.00	$41,226.00	$44,365.00	7.6%	$142.20
4191	Tenant Organization	$0.00	$0.00	$0.00	0%	$0.00
4100	TOTAL ADMINISTRATION	$56,026.00	$52,332.00	$58,915.00	12.6%	$188.83
4310	Water	$20,000.00	$16,025.00	$18,000.00	12.3%	$57.69
4320	Electricity	$17,000.00	$11,503.00	$13,000.00	13%	$41.67
4330	Gas	$7,500.00	$10,194.00	$11,000.00	7.9%	$35.26
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	$3,250.00	$3,572.00	$4,000.00	12%	$12.82
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	$47,750.00	$41,294.00	$46,000.00	11.4%	$147.44

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

EXPENSES

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	$31,014.00	$31,139.00	$32,387.00	4%	$103.81
4420	Materials & Supplies	$5,000.00	$6,067.00	$6,000.00	-1.1%	$19.23
4430	Contract Costs	$11,000.00	$18,533.00	$16,500.00	-11%	$52.88
4400	TOTAL MAINTENANCE	$47,014.00	$55,739.00	$54,889.00	-1.5%	$175.93
4510	Insurance	$6,054.00	$5,991.00	$5,728.00	-4.4%	$18.36
4520	Payment in Lieu of Taxes	$3,650.00	$3,600.00	$3,650.00	1.4%	$11.70
4540	Employee Benefits	$7,589.00	$6,233.00	$7,917.00	27%	$25.38
4541	Employee Benefits - GASB 45	$0.00	$0.00	$0.00	0%	$0.00
4542	Pension Expense - GASB 68	$0.00	$0.00	$0.00	0%	$0.00
4570	Collection Loss	$0.00	$641.00	$0.00	-100%	$0.00
4571	Collection Loss - Fraud/Retroactive	$0.00	$0.00	$0.00	0%	$0.00
4580	Interest Expense	$0.00	$0.00	$0.00	0%	$0.00
4590	Other General Expense	$0.00	$0.00	$0.00	0%	$0.00
4500	TOTAL GENERAL EXPENSES	$17,293.00	$16,465.00	$17,295.00	5%	$55.43
4610	Extraordinary Maintenance	$47,170.00	$32,867.00	$20,000.00	-39.1%	$64.10
4611	Equipment Purchases - Non Capitalized	$1,699.00	$7,291.00	$2,000.00	-72.6%	$6.41
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	$92,240.00	$0.00	-100%	$0.00
4600	TOTAL OTHER EXPENSES	$48,869.00	$132,398.00	$22,000.00	-83.4%	$70.51
4000	TOTAL EXPENSES	$216,952.00	$298,228.00	$199,099.00	-33.2%	$638.14

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

SUMMARY

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	$196,243.00	$203,901.00	$197,617.00	-3.1%	$633.39
4000	TOTAL EXPENSES	$216,952.00	$298,228.00	$199,099.00	-33.2%	$638.14
2700	NET INCOME (DEFICIT)	$-20,709.00	$-94,327.00	$-1,482.00	-98.4%	$-4.75
7520	Replacements of Equip. - Capitalized	$10,000.00	$9,636.00	$0.00	-100%	$0.00
7540	Betterments & Additions - Capitalized	$0.00	$0.00	$0.00	0%	$0.00
7500	TOTAL NONOPERATING EXPENDITURES	$10,000.00	$9,636.00	$0.00	-100%	$0.00
7600	EXCESS REVENUE OVER EXPENSES	$-30,709.00	$-103,963.00	$-1,482.00	-98.6%	$-4.75

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 properly that has not been fully depreciated.

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

4520: Payments in Lieu of Taxes:
This account should be charged with all payments in lieu of taxes accruing to a municipality or other local taxing body.

4540: Employee Benefits: This account should be charged with local housing authority contributions to employee benefit plans such as pension, retirement, and health and welfare plans. It should also be charged with administrative expenses paid to the State or other public agencies in connection with a retirement plan, if such payment is required by State Law, and with Trustee's fees paid in connection with a private retirement plan, if such payment is required under the retirement plan contract.
Employee benefits are based upon a given percentage of the total payroll; therefore, the total amount approved in this account will be based on the approved budgeted salaries representing the state's fair share.

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

Narrative Responses to the Performance Management Review (PMR) Findings

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

Explanation of PMR Criteria Ratings

CRITERION	DESCRIPTION
Management	
Occupancy Rate	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) • "No Findings" : Occupancy Rate is at or above 98% • Operational Guidance: Occupancy rate is at 95% up to 97.9% • Corrective Action: Adjusted occupancy rate is less than 95%
Tenant Accounts Receivable (TAR)	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) • "No Findings" : At or below 2% • "Operational Guidance": More than 2% , but less than 5% • "Corrective Action": 5% or more
Certifications and Reporting Submissions	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. • "No Findings": At least 11 of the required 12 reports were submitted and at least 9 were submitted on time. • "Operational Guidance": Less than 11 of the required 12 reports were submitted and/or less than 9 were submitted on time.
Board Member Training	Percentage of board members that have completed the mandatory online board member training. • "No Findings" : 80% or more completed training • "Operational Guidance" : 60-79.9% completed training • "Corrective Action" : <60 % completed training
Staff Certifications and Training	Each LHA must have at least one staff member complete a relevant certification or training During the fiscal year. The number of required trainings varies by LHA size. • No Findings: LHAs completed the required number of trainings Corrective Action: LHAs have not completed any trainings
Annual Plan (AP) Submitted	Housing authorities are required to submit an annual plan every year. • "No Findings" =Submitted on time • "Operational Guidance" =Up to 45 days late • "Corrective Action" =More than 45 days late

CRITERION	DESCRIPTION
CHAMP	
Paper applications	Paper applications are available, received and entered into CHAMP • No Findings: Paper applications are available; And paper applications are date and time stamped correctly; And 90% of new paper applications are entered into CHAMP within 15 calendar days of date/time stamp; And 2% or less of new paper applications are entered more than 30 days after date/time stamp • Operational Guidance: Paper applications are available; And paper applications are date and time stamped and entered correctly; And 75% - 89% of new paper applications are entered into CHAMP within 15 calendar days; And 3% - 5% of new paper applications are entered more than 30 days after date/time stamp Corrective Action: Paper applications are not available; Or the LHA has failed to date and time stamp paper applications and/or failed to enter them correctly; Or Less than 75% of new paper applications are entered into CHAMP within 15 calendar days of date/time stamp; Or more than 5% of new paper applications are entered more than 30 days after date/time stamp
Vacancies occupied using CHAMP	Vacancies are recorded correctly and occupied using CHAMP • No Findings: All vacancies during the fiscal year are recorded in DHCD's Housing Applications Vacancy System within 30 days; And the housed Applicant ID and Pull List ID match between DHCD's Housing Applications Vacancy System and CHAMP for unit occupied during the fiscal year, excluding administrative transfers; And 25% or less of occupied units have data entry errors • Operational Guidance: All vacancies during the fiscal year are recorded in DHCD's Housing Applications Vacancy System, all vacancies are not recorded within 30 days; Or the Housed Applicant ID and Pull List ID match between DHCD's Housing Applications Vacancy System and CHAMP for units occupied during the fiscal year, excluding administrative transfers; And greater than 25% of occupied units have data entry errors • Corrective Action: All vacancies during the fiscal year are not recorded in DHCD's Housing Applications Vacancy System; Or the Housed Applicant ID and Pull List ID do not match (or data is missing) between DHCD's Housing Applications Vacancy System and CHAMP for units occupied during the fiscal year, excluding administrative transfers

CRITERION	DESCRIPTION
Financial	
Adjusted Net Income	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. Underspending Rating: • "No Findings" : 0 to 9.9% • "Operational Guidance": 10 to 14.9% • "Corrective Action": 15% or higher Overspending Rating: • "No Findings" : 0 to -4.9% • "Operational Guidance": -5% to -9.9% • "Corrective Action": -10% or below
Operating Reserves	Current Operating Reserve as a percentage of total maximum reserve level. Appropriate reserve level is buffer against any unforeseen events or expenditures. • "No Findings" :35%+ of maximum operating reserve • "Operational Guidance": 20% to 34.9% of maximum operating reserve • "Corrective Action": <20% of maximum operating reserve
Capital Planning	
Capital Spending	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 • "No Findings" = at least 80% • "Operational Guidance" = At least 50% • "Corrective Action" = Less than 50%

CRITERION	DESCRIPTION
Health & Safety	
Health & safety violations	DHCD has observed conditions at the LHA's developments and reported health and safety violations. The LHA has certified the number of corrected violations in each category.
Facility Management – Inspection Standards and Practices	
100% Unit Inspections	All units inspected at LHA during FY under review • No Findings: 100% of units inspected Corrective Action: Less than 100% of units inspected
LHA Inspections Reports/Work Orders	Unit inspection reports create, track, and report work orders for inspection repairs, and inspection WOs completed within 30 days or add to DM/CIP • No Findings: All inspection work orders/lease violations are created, tracked, and reported; And non-health and safety work orders for inspection repairs/lease violations are completed within 30 days or added to DM/CIP; And health and safety work orders for inspection repairs/lease violations are addressed within 48 hours • Operational Guidance: All health and safety inspection work orders/lease violations are created, tracked, reported and completed within 48 hours; And LHA fail to create, track, or report no more than 1 or 2 (based on LHA size) non-EHS (exigent health and safety) deficiencies; Or LHA failed to complete any non-EHS work orders/lease violations appropriately • Corrective Action: Any EHS work orders/lease violations not created, tracked, reported, or completed; Or 1 of the following: LHA failed to create, track or report a) More than 1 non-EHS deficiency (small LHA); b) More than 2 non-EHS deficiencies (Medium/Large)
Accuracy of LHA Inspections	Unit inspection reports accurately reflect necessary repairs • No Findings: c.667 unit has less than 2 EHS deficiencies and c.200/705 unit has less than 3 EHS deficiencies • Operational Guidance: c.667 unit has 2 EHS deficiencies or c.200/705 has 3 EHS deficiencies Corrective Action: c.667 has equal to or greater than 3 EHS deficiencies or c.200/705 unit has equal to or greater than 4 EHS deficiencies
Facility Management – Vacancy Turnover Standards and Practices	

CRITERION	DESCRIPTION
Vacancy Turnover Work Orders	Work orders created for every vacancy and completed within 30 days (or waiver requested) • No Findings: Vacancy work orders are created, tracked and reported for every unit and reflect all work in unit; And Vacancy work orders are Maintenance Ready in <=30 days for c.667 units or <=45 days for c.200/705 units or have approved waiver • Operational Guidance: Vacancy work orders are created, tracked and reported for every unit; And work orders do not reflect all work completed in unit; Or vacancy work orders are Maintenance Ready in 31-45 days for c.667 and 46-60 days for c.200/705 and no approved waiver Corrective Action: Vacancy work orders are not created, tracked and reported for every unit; Or vacancy work orders are Maintenance Ready in >45 days for c.667 and >60 days for c.200/705 and have no approved waiver
Accuracy and Standard of Vacancy Turnovers	Vacancy turnover work orders accurately reflect necessary repairs • No Findings: c.667 unit less than 2 EHS deficiencies and c.200/705 less than 3 EHS deficiencies • Operational Guidance: c.667 2 EHS deficiencies or c.200/705 3 EHS deficiencies Corrective Action: c.667 equal to or greater than 3 EHS deficiencies or c.200/705 equal to or greater than 4 EHS deficiencies
Facility Management – Preventative Maintenance Standards and Practices	
LHA Preventative Maintenance Schedule Accuracy and Implementation of Preventative Schedules	LHA preventative maintenance schedule accurately reflects all necessary work to maximize the life of LHA components • No Findings: c.667 unit less than 2 EHS deficiencies and c.200/705 less than 3 EHS deficiencies • Operational Guidance: c.667 2 EHS deficiencies or c.200/705 3 EHS deficiencies Corrective Action: c.667 equal to or greater than 3 EHS deficiencies or c.200/705 equal to or greater than 4 EHS deficiencies
Work Order Types and Systems	
Emergency Work Orders	All emergency work orders are created, tracked, reported and completed within 48 hours • No Findings: All emergency work orders under review are created, tracked, reported and completed within 48 hours • Operational Guidance: All emergency work orders completed within 48 hours; Less than 100% but greater than or equal to 80% of work orders under review are correctly created, tracked and reported administratively

CRITERION	DESCRIPTION
	• Corrective Action: Not all emergency work orders are completed within 48 hours; Or less than 80% of work orders under review are correctly created, tracked and reported administratively
Requested Work Orders	All requested work orders are created, tracked, reported and completed within 14 days or added to DM/CIP • No Findings: All requested work orders under review are created, tracked, and reported; All work is complete within 14 days or added to DM/CIP • Operational Guidance: All requested work orders completed within 14 days or added to DM/CIP; And less than 100% of work orders under review are correctly created, tracked and reported Corrective Action: Not all requested work orders are completed within 14 days or added to DM/CIP

Policies

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

Policy	**Last Ratified by Board Vote**	**Notes**
*Rent Collection Policy	01/05/2005	
*Personnel Policy	01/05/2005	
*Capitalization Policy	01/05/2005	
*Procurement Policy	01/05/2005	
*Grievance Policy	01/05/2005	
Fair Housing Marketing Plan	09/22/2022	
Reasonable Accommodations Policy	09/12/2022	
Affirmative Action Policy	09/12/2022	

* 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

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

Description	Reason	Date Waiver Approved by DHCD	Date Expired
Waiver to join RCAT	Board Vote to use RCAT	01/01/2019	01/01/2025

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

Glossary

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

AHVP: Alternative Housing Voucher Program

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

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

ANUEL: Allowable Non-Utility Expense Level

AP: Annual Plan

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

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

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

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

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

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

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

CNA: Capital Needs Assessment

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

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

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

DHCD: Massachusetts Department of Housing & Community Development

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

FF: Formula Funding

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

FYE: Fiscal Year End

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

HHA: Host Housing Authority for the RCAT program.

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

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

LHA: Local Housing Authority

LTO: Local Tenants Organization

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

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

MOR: Management and Occupancy Report

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

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

Performance Management Review (PMR):

PMR: Performance Management Review

RCAT: Regional Capital Assistance Team

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

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

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

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

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

Attachments

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

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

- Cover sheet for tenant satisfaction surveys

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, Fall 2021, and Fall 2022. CSR surveyed all family units in Fall 2020.

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.