

**Overview and Certification**

# Dracut Housing Authority

## Annual Plan for Fiscal Year 2025

### 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 Dracut Housing Authority's Annual Plan for their 2025 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. Public Comments
  - b. 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.

<b>Dev No</b>	<b>Type</b>	<b>Development Name</b>	<b>Num Bldgs</b>	<b>Year Built</b>	<b>Dwelling Units</b>
667-2A	Elderly	Mammoth Rd 667-2A	1	1991	18
667-2C	Elderly	Parker Avenue 667-2C	1	1991	20
705-03	Family	Perron Lane Family Housing 705-03	12	1990	19
667-2B	Elderly	Pleasant St (condos) 667-2B	8	1987	15
	Family	Family units in smaller developments	11		17
	Other	Special Occupancy units	2		8
<b>Total</b>			<b>35</b>		<b>97</b>

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

<b>Dev No</b>	<b>Type</b>	<b>Development Name</b>	<b>Num Bldgs</b>	<b>Year Built</b>	<b>Dwelling Units</b>
667-01	Elderly	HANSON GLEN 667-01	12	1980	80

**Federally Assisted Developments**

Dracut Housing Authority also manages Federally-assisted public housing developments and/or federal rental subsidy vouchers serving 115 households.

LHA Central Office

Dracut Housing Authority  
 971 Mammoth Road, Dracut, MA, 01826  
 Mary Karabatsos, Executive Director  
 Phone: 978-957-3515  
 Email: drahouse@aol.com

LHA Board of Commissioners

	<u>Role</u>	<u>Category</u>	<u>From</u>	<u>To</u>
Tom Bomil	Vice-Chair		05/01/2020	05/01/2025
Andre Dubuque			05/01/2022	05/01/2027
Charles Kanavos	Member		05/01/2019	05/01/2024
George Nangle	Treasurer		05/01/2023	05/01/2028
Matthew Sheehan	Chair	State Appointee	01/26/2020	01/26/2025

Plan History

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

	<u>REQUIREMENT</u>	<u>DATE COMPLETED</u>
A.	Advertise the public hearing on the LHA website.	04/24/2024
B.	Advertise the public hearing in public postings.	04/24/2024
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.	04/24/2024
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.)	06/17/2024
G.	Executive Director presents the Annual Plan to the Board.	06/17/2024
H.	Board votes to approve the AP. (For Boston Housing Authority, the Administrator approves and submits the AP.)	06/17/2024

## Certification

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

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

This certification applies to the following applications:

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

### CERTIFICATION FOR SUBMISSION OF THE ANNUAL PLAN

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

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

Date of certification: 06/21/2024

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

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

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

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

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

The CIP includes the following parts:

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

**Capital Improvement Plan (CIP)**

**Aggregate Funding Available for Projects in the First Three Years of the CIP:**

Category of Funds	Allocation	Planned Spending	Description
Balance of Formula Funding (FF)	\$1,322,165.84		Total of all FF awards minus prior FF spending
LHA Emergency Reserve	\$132,216.58		Amount to reserve for emergencies
Net FF Funds (First 3 Years of the CIP)	\$1,189,949.26	\$529,619.33	Funds to plan & amount actually planned in the first 3 years of the CIP
ADA Set-aside	\$1,859.00	\$1,868.55	Accessibility projects
DMH Set-aside	\$0.00	\$0.00	Dept. of Mental Health facility
DDS Set-aside	\$2,575.82	\$2,575.82	Dept. of Developmental Services facility
Unrestricted Formula Funding (FF)	\$1,185,514.44	\$525,174.96	Funds awarded by DHCD to be used on projects selected by the LHA and approved by DHCD.
Special DHCD Funding	\$353,918.02	\$343,918.02	Targeted awards from DHCD
Community Development Block Grant (CDBG) Funds	\$0.00	\$0.00	Federal funds awarded by a city or town for specific projects.
Community Preservation Act (CPA) Funds	\$0.00	\$0.00	Community Preservation Act funds awarded by a city or town for specific projects.
Operating Reserve(OR) Funds	\$0.00	\$0.00	Funds from the LHA's operating budget.
Other Funds	\$0.00	\$0.00	Funds other than those in the above categories. See explanation below.
<b>Total funds and planned spending</b>	<b>\$1,543,867.28</b>	<b>\$873,537.35</b>	<b>Total of all anticipated funding available for planned projects and the total of planned spending.</b>

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

Dracut 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 2024	fy2025 Planned	fy2026	fy2027	fy2028	fy2029
079078	Roof Repair	Perron Lane	\$75,762	\$67,647	\$7,615	\$0	\$0	\$0	\$0	\$0
079087	Bathroom modernization - Bld 6 - Unit 4	Pleasant St (condos) 667-2B	\$9,177	\$0	\$0	\$9,177	\$0	\$0	\$0	\$0
079089	Install New Generator - Community Center	Parker Avenue 667-2C	\$105,678	\$9,064	\$14,340	\$0	\$0	\$0	\$0	\$0
079095	Bathroom modernization - Bld 10, Unit A1	Pleasant St (condos) 705-C0 705-C0	\$8,644	\$0	\$0	\$8,644	\$0	\$0	\$0	\$0
079097	Envelope Repairs	SCATTERED SITE-SLADEN 705-C7	\$10,245	\$0	\$0	\$10,245	\$0	\$0	\$0	\$0
079100	COVID-19 Office Adaptaion: Door and seating	Mammoth Rd 667-2A	\$9,900	\$0	\$0	\$9,900	\$0	\$0	\$0	\$0
079103	ARPA Targeted Award - Dracut - 667-2C Fire Alarm System, Zoned, Complete	Parker Avenue 667-2C	\$131,290	\$0	\$0	\$116,830	\$5,000	\$0	\$0	\$0
079104	ARPA FF: Phase 2-Replacement of 4 roof	Perron Lane Family Housing 705-03	\$95,281	\$0	\$600	\$0	\$0	\$0	\$0	\$0
079106	Congregate kitchen modernization	Mammoth Rd 667-2A	\$65,546	\$0	\$0	\$61,896	\$0	\$0	\$0	\$0
079107	Parker Ave Roof replacement	Parker Avenue 667-2C	\$156,630	\$0	\$1,130	\$141,661	\$0	\$0	\$0	\$0
079109	EMG Mold abatement	Perron Lane Family Housing 705-03	\$34,031	\$0	\$0	\$12,882	\$0	\$0	\$0	\$0

Capital Improvement Plan (CIP)

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

Cap Hub Project Number	Project Name	Development(s)	Total Cost	Amount Spent Prior to Plan	Remaining Planned for 2024	fy2025 Planned	fy2026	fy2027	fy2028	fy2029
079110	VU24 Unit rehab 27 Perron Lane	Perron Lane Family Housing 705-03	\$134,508	\$0	\$0	\$59,687	\$74,822	\$0	\$0	\$0
•	Kitchen modernization, partial	Parker Avenue 667-2C	\$188,617	\$0	\$0	\$0	\$0	\$93,895	\$94,723	\$0
•	Paint hall ways	Perron Lane Special Needs 689-01	\$11,344	\$0	\$0	\$0	\$11,344	\$0	\$0	\$0
•	Perron Lane Roof replacement Phase 2	Perron Lane Family Housing 705-03	\$50,774	\$0	\$0	\$0	\$0	\$0	\$50,774	\$0
•	Selective sidewalk repairs / replacement	Perron Lane Family Housing 705-03	\$12,479	\$0	\$0	\$12,479	\$0	\$0	\$0	\$0
•	Replace Exterior doors, windows, and siding	SCATTERED SITE-BOLTON AVE 705-C8	\$83,542	\$0	\$0	\$25,020	\$58,523	\$0	\$0	\$0
•	Kitchen and Bathroom renovation	SCATTERED SITE-BOLTON AVE 705-C8	\$61,530	\$0	\$0	\$0	\$61,530	\$0	\$0	\$0
•	Porch replacement (Front and side)	SCATTERED SITE-BOLTON AVE 705-C8	\$12,426	\$0	\$0	\$0	\$12,426	\$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	Sustainability	Special Awards	CDBG	CPA	Operating Reserve	Other Funds
079103	ARPA Targeted Award - Dracut - 667-2C Fire Alarm System, Zoned, Complete	ARPA Targeted	\$0	\$0	\$0	\$131,290	\$0	\$0	\$0	\$0
079104	ARPA FF: Phase 2-Replacement of 4 roof	ARPA Formula Funding	\$0	\$0	\$0	\$78,121	\$0	\$0	\$0	\$0
079110	VU24 Unit rehab 27 Perron Lane	VU - unit 27	\$0	\$0	\$0	\$134,508	\$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.

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

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

Projects, which are already in bidding or construction in year 1 exceed the capshare.

#### **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.

Dracut Housing Authority has not requested additional funding.

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

To continue to work on roof and exterior improvements while address severely worn vacant units

#### **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:

We created a couple urgent projects for porch replacements

#### **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 01/15/2024.

**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 03/19/2024.

**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**

Dracut Housing Authority has one or more special needs (167 or 689 programs) development. We have completed the service provider input process according to the required procedures detailed in the lease agreement and held an annual meeting with the service provider staff at all special needs developments as of 02/12/2024.

**12. Energy and water consumption**

Our 12 most recent monthly energy reports are for months 4/2023 to 3/2024.

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-C8

705-C2

The water usage is high at the 705 scattered site. Maintenance is looking into potential leaks and will remind the residents of the water usage policy

**13. Energy or water saving initiatives**

Dracut 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-2025-Dracut Housing Authority-01037 had an energy audit under the Low-Income Energy Affordability Network (LEAN) program on 03/15/2019

**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%)

2.8% c. 705 (DHCD Goal 2%)

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

705 has several typical unit turns as well as newly created project 079-705-03-0-24-445 for 5 Perron Lane

Maintenance and Repair Plan**Maintenance Objective**

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

**About This Maintenance and Repair Plan**

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

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

### Classification and Prioritization of Maintenance Tasks

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

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

### Additional Remarks by the Dracut Housing Authority

HAB



**Emergency Request System**

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

<b>METHOD</b>	<b>CONTACT INFO.</b>	<b>TIMES</b>
Call Answering Service	978-957-3515	Any time (day or night)
Call LHA at Phone Number	978-957-3515	Any time (day or night)

Residents have been notified to that they should call 911 in emergency 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 Dracut Housing Authority main office.

<b>QUALIFYING EMERGENCY WORK REQUESTS</b>
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:

<b>METHOD</b>	<b>CONTACT INFO.</b>	<b>TIMES</b>
Text Phone Number		
Call Answering Service	978-957-3515	5:00 PM - 8:30 AM - Mon - Friday &
Call Housing Authority Office	978-957-3515	8:30 AM - 5:00 PM Mon - Friday
Submit Online at Website		
Email to Following Email	mkarabatsos@dracutha.co	All times
Other		

**Work Order Management**

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

Type of work order system:

Work order classification used:

Emergency	
Vacancy	
Preventative Maintenance	
Routine	
Inspections	
Tenant Requests	

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

C. Our work order process includes the following steps:

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

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

Deferred work orders are also a classification that we use

**Maintenance Plan Narrative**

Following are Dracut 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 received positive feedback from our tenants related to our maintenance department. The maint. dept. works diligently to to turn vacancies over within the allotted time frames.

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

We have purchase a new tractor in order to address landscaping needs.

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

We will be transferring maintenance staff to different developments so the basically have knowledge of the different properties.

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	\$276,202.00	\$55,741.00
Last Fiscal Year Actual Spending	\$284,985.00	\$51,392.00
Current Fiscal Year Budget	\$286,952.00	\$55,000.00

E. Unit Turnover Summary

# Turnovers Last Fiscal Year	8
Average time from date vacated to make Unit "Maintenance Ready"	26 days
Average time from date vacated to lease up of unit	34 days

**Attachments**

These items have been prepared by the Dracut 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.

Preventive maintenance is work undertaken according to a schedule to prevent breakdown of major mechanical systems and equipment, and to prevent the deterioration of apartments and equipment. The DHA Preventive Maintenance Program will include regular comprehensive inspections and repairs of all units, equipment, buildings, and common areas. Identifying these maintenance needs will help the authority reduce the frequency and severity of breakdowns and service interruptions. These inspections will include checking, measuring, observing, and correcting deficiencies found in the units, major mechanical systems, equipment/vehicles, exterior of units, and grounds.

The DHA Preventive Maintenance Program will be the key to achieving control of maintenance. It will reduce resident-generated work orders to a manageable level, speed up vacancy turnaround since units will be generally in better condition upon a vacate, and provide information to management for follow-up with regard to care of the unit by the occupant.

The Maintenance Department will have more control over the scheduling of Preventive Maintenance than it has over routine corrective or emergency maintenance. Repair needs caught early will prevent emergencies, save dollars later, and substantially reduce resident generated work-orders. The Preventive Maintenance inspections and work also will help establish a record of deterioration which may signal modernization needs that can be systematically planned and scheduled. This maintenance will avoid waiting for a major crisis to occur before addressing a predictable problem.

The DHA Preventive Maintenance Schedule will identify when tasks need to be completed. The system in place will record the date each inspection was conducted; who did it, and a process for ensuring that needed work is completed. This process will assign accountability to inspectors, and provides a sense of responsibility for their work.

When the Preventive Maintenance Program requires work that is predictable and repetitive (such as cleaning burners or replacing filters), maintenance staff will tend to work from a schedule. If inspections identify a need for unanticipated repairs, or replacements, the staff will generate work orders. If work orders are generated, they will be identified as routine or emergency and will follow the work assignment process. A schedule of unit inspections will be prepared at the beginning of each calendar year and monitored each month to ensure that all units are inspected at least annually.

- Circulators
- Domestic hot water tanks

## 2. SECURITY SYSTEMS

- Exterior lighting
- Public hallway lighting
- Building doors and locks

## 3. FIRE AND LIFE SAFETY SYSTEMS

- Emergency generators
- Fire extinguishers
- Emergency lighting/exit lights
- Sprinkler systems
- Fire alarm systems

## 4. ROOFS

- Roof inspection
- Gutter cleaning

## 5. PLUMBING

- Catch basins
- Sanitary drains

## 6. VEHICLES

- Safety inspection
- Tune up
- Fluid check

## 7. ANNUAL INSPECTIONS

- Dwelling units

## 9. COMMON AREAS

- Grounds
- Hallways and stairwells
- Community rooms and rest rooms

## 10. PEST CONTROL

## **1. Vehicle Inspection:**

- Check all fluid levels: crank case, transmission, etc..
- Check antifreeze, radiator rust inhibitor 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
- Check heater and defroster
- Check wiper blades for wear
- Check underbody for corrosion and hose off

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

## **3. Unit inspections – schedule 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 becomes aware of the property conditions and any lease enforcement issues.

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

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



( )

2

3. Oil circulator pumps.
4. Clean dryer vents.
5. Inventory tools, equipment, refrigerators and stoves in stock.
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.

### **February Preventative Maintenance Tasks**

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 and linoleum flooring if appropriate.
6. Clear common hallways and stairs free from all obstructions. According to the State Sanitary code 105 CMR 410.451 – No person shall obstruct any exist 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.
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.

### **March Preventative Maintenance Tasks**

1. Re-set 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

2. Clean dryer vents, exhaust vents and roof vent motors.
3. Service lawn equipment.
4. Inspect roofs and siding.
5. Clean common area flooring and carpeting.
6. Cleaning of parking areas, roadways, driveways, walkways and storm drains.
7. Inspect trees and trim as needed.
8. Check smoke detectors and carbon monoxide detectors during annual inspections.
9. Check for proper AC installations.

### **May Preventative Maintenance Tasks**

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.
8. Fertilize lawns.
9. Lease enforcement: Cooking grills and fire pits. 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.
10. All cooking grills should be used at a minimum of 10 feet from all structures.

### **June Preventative Maintenance Tasks**

1. Summer boiler shut-down and PM service (non-heating season June 16<sup>th</sup> to September 14<sup>th</sup>).
2. Change A/C, heat and air handler filters.
3. Check interior emergency lighting.
4. Weed and edge all planting beds every two weeks.
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.

2. Inspect gutters, downspouts and splash blocks, repair as needed.
3. Inspect common area windows.
4. Inspect and repair site fencing.

### **August Preventative Maintenance Tasks**

1. Strip, wax and buff VCT and linoleum flooring.
2. Lease enforcement: Common hallways and stairs free from all obstructions. 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 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 Tasks**

1. Check electrical panels in boiler rooms and all common areas.
2. Domestic hot water systems.
3. Boiler tune – up.
4. Clean storage rooms and maintenance areas.
5. Touch up all common area paint.
6. Clean heater vents in all common areas.
7. Removal of all ACs.

### **October Preventative Maintenance Tasks**

1. October 7<sup>th</sup> – October 13<sup>th</sup>- Fire Prevention Month. Schedule fire systems annual inspections and upgrades.
2. Boiler tune up.
3. Change a/c, heat and air handler filters.
4. Annual cleaning of all gutters.
5. Leaf removal.
6. Prune and trim all shrubs and bushes.

## **November Preventative Maintenance Tasks**

1. Reset light timers and clocks back 1 hour for daylight saving time.
2. Inspect trees and trim as needed.
3. Clean common area carpets and flooring.
4. Check on blocked egresses from community buildings.
5. 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 Tasks**

1. Monitor and issue on-going snow removal work orders.
2. Check and replace flags as needed.
3. 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.

- Circulators
- Domestic hot water tanks

## 2. SECURITY SYSTEMS

- Exterior lighting
- Public hallway lighting
- Building doors and locks

## 3. FIRE AND LIFE SAFETY SYSTEMS

- Emergency generators
- Fire extinguishers
- Emergency lighting/exit lights
- Sprinkler systems
- Fire alarm systems

## 4. ROOFS

- Roof inspection
- Gutter cleaning

## 5. PLUMBING

- Catch basins
- Sanitary drains

## 6. VEHICLES

- Safety inspection
- Tune up
- Fluid check

## 7. ANNUAL INSPECTIONS

- Dwelling units

## 9. COMMON AREAS

- Grounds
- Hallways and stairwells
- Community rooms and rest rooms

## 10. PEST CONTROL

## **1. Vehicle Inspection:**

- Check all fluid levels: crank case, transmission, etc..
- Check antifreeze, radiator rust inhibitor 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
- Check heater and defroster
- Check wiper blades for wear
- Check underbody for corrosion and hose off

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

## **3. Unit inspections – schedule 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 becomes aware of the property conditions and any lease enforcement issues.

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

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





3. Oil circulator pumps.
4. Clean dryer vents.
5. Inventory tools, equipment, refrigerators and stoves in stock.
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.

### **February Preventative Maintenance Tasks**

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 and linoleum flooring if appropriate.
6. Clear common hallways and stairs free from all obstructions. According to the State Sanitary code 105 CMR 410.451 – No person shall obstruct any exist 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.
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.

### **March Preventative Maintenance Tasks**

1. Re-set 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

2. Clean dryer vents, exhaust vents and roof vent motors.
3. Service lawn equipment.
4. Inspect roofs and siding.
5. Clean common area flooring and carpeting.
6. Cleaning of parking areas, roadways, driveways, walkways and storm drains.
7. Inspect trees and trim as needed.
8. Check smoke detectors and carbon monoxide detectors during annual inspections.
9. Check for proper AC installations.

### **May Preventative Maintenance Tasks**

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.
8. Fertilize lawns.
9. Lease enforcement: Cooking grills and fire pits. 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.
10. All cooking grills should be used at a minimum of 10 feet from all structures.

### **June Preventative Maintenance Tasks**

1. Summer boiler shut-down and PM service (non-heating season June 16<sup>th</sup> to September 14<sup>th</sup>).
2. Change A/C, heat and air handler filters.
3. Check interior emergency lighting.
4. Weed and edge all planting beds every two weeks.
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.

2. Inspect gutters, downspouts and splash blocks, repair as needed.
3. Inspect common area windows.
4. Inspect and repair site fencing.

### **August Preventative Maintenance Tasks**

1. Strip, wax and buff VCT and linoleum flooring.
2. Lease enforcement: Common hallways and stairs free from all obstructions. 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 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 Tasks**

1. Check electrical panels in boiler rooms and all common areas.
2. Domestic hot water systems.
3. Boiler tune – up.
4. Clean storage rooms and maintenance areas.
5. Touch up all common area paint.
6. Clean heater vents in all common areas.
7. Removal of all ACs.

### **October Preventative Maintenance Tasks**

1. October 7<sup>th</sup> – October 13<sup>th</sup>- Fire Prevention Month. Schedule fire systems annual inspections and upgrades.
2. Boiler tune up.
3. Change a/c, heat and air handler filters.
4. Annual cleaning of all gutters.
5. Leaf removal.
6. Prune and trim all shrubs and bushes.

## **November Preventative Maintenance Tasks**

1. Reset light timers and clocks back 1 hour for daylight saving time.
2. Inspect trees and trim as needed.
3. Clean common area carpets and flooring.
4. Check on blocked egresses from community buildings.
5. 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 Tasks**

1. Monitor and issue on-going snow removal work orders.
2. Check and replace flags as needed.
3. 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.

H.M.S. for Windows

winWORK Work Orders  
Work Order Detail Report

TENANT NAME	CLOSED DATE	PRI
Lane, Dracut, MA 01826 ut Water Department)	6/15/2022	P
SUBCONTRACTOR TOTALS:		
	6/15/2022	P
Lane, Dracut, MA 01826		
Maria D Camillo		
SUBCONTRACTOR TOTALS:		
	9/12/2022	P
Lane, Dracut, MA		
Non-dwelling		
ane, Dracut, MA		
Non-dwelling		
ystem.		
SUBCONTRACTOR TOTALS:		
	9/12/2022	P
Lane, Dracut, MA 01826		
Sandra Dirocco		
SUBCONTRACTOR TOTALS:		
	10/21/2022	P
Lane, Dracut, MA 01826		
the property.		
SUBCONTRACTOR TOTALS:		
	10/24/2022	P
Lane, Dracut, MA 01826		
Non-dwelling		
1 - Bldgs/Grounds/Commo		
Perron Lane entrance.		
SUBCONTRACTOR TOTALS:		
	11/9/2022	P
Lane, Dracut, MA 01826		
Non-dwelling		
1 - Bldgs/Grounds/Commo		
Perron Lane.		
SUBCONTRACTOR TOTALS:		
	11/22/2022	P
Lane, Dracut, MA 01826		
Non-dwelling		
1 - Bldgs/Grounds/Commo		
val of the property.		
SUBCONTRACTOR TOTALS:		
	11/30/2022	P
Lane, Dracut, MA 01826		
Non-dwelling		
1 - Bldgs/Grounds/Commo		
is.		
SUBCONTRACTOR TOTALS:		
	12/21/2022	P
Lane, Dracut, MA 01826		
Non-dwelling		
1 - Bldgs/Grounds/Commo		
are needed.		
SUBCONTRACTOR TOTALS:		
		P

**H.M.S. for Windows**  
**winWORK Work Orders**  
**Work Order Detail Report**

TENANT NAME

CLOSED DATE

PRI

ane, Dracut, MA

Non-dwelling

P

SUBCONTRACTOR TOTALS: \_\_\_\_\_

LABOR TOTALS:

MATERIAL TOTALS:

SUBCONTRACTOR TOTALS:

**Grand Totals:**

*Ten Charge*

\$0.00

\$0.00

\$0.00

*HA Cost*

\$0.00

\$0.00

\$0.00

I, \_\_\_\_\_ HAVE READ THE DRACUT HOUSING  
AUTHORITY'S PREVENTATIVE MAINTENANCE POLICY. I FULLY UNDERSTAND  
THIS POLICY AND WILL ENSURE TO THE BEST OF MY ABILITY TO ADHERE TO THE  
GUIDELINES WITHIN.

\_\_\_\_\_  
Signature of Maintenance Staff

\_\_\_\_\_  
Date



PREVENTATIVE MAINTENANCE PLAN  
DRACUT HOUSING AUTHORITY

901 MAMMOTH ROAD  
PARKER AVENUE  
MYRON STREET  
BOUCHARD AVENUE  
VARNUM AVENUE  
TURGEON AVENUE  
SLADEN STREET  
HAMPSON STREET  
COVENTRY GARDEN

PREVENTATIVE MAINTENANCE PLAN  
901 MAMMOTH ROAD

- CLEAN BOILER MAGS ANNUALLY.
- TURN OFF HEAT COILS IN SPRING AND TURN ON JUST BEFORE WINTER.
- TURN OFF OUTSIDE WATER AT B1 AND B6 BEFORE WINTER AND TURN ON IN THE SPRING.
- CHECK ALL PUMPS AND CONTROLS FOR ANY LOOSE WIRES OR CORROSION.
- HAVE FIRE ALARMS TESTED ANNUALLY.
- INSPECT STRUCTURE ANNUALLY FOR ANY DEFECTS.
- INSPECT UNITS ANNUALLY.
- INSPECT ELECTRICAL PANEL ANNUALLY
- INSPECT WATER HEATER ANNUALLY

THIS PREVENTATIVE MAINTENANCE PLAN IS SUBMITTED BY BRIAN MARTIN  
MARCH 1, 2017

PREVENTATIVE MAINTENANCE PLAN  
PARKER AVENUE

- \*CLEAN BOILER MAGS ANNUALLY
- \* CHECK ALL PUMPS AND CONTROLS FOR LOOSE WIRES OR CORROSION
- \* HAVE FIRE ALARMS TESTED ANNUALLY
- \* INSPECT STRUCTURE ANNUALLY FOR ANY DEFECTS
- \* INSPECT ALL UNITS ANNUALLY
- \* INSPECT ELECTRICAL PANEL ANNUALLY
- \* INSPECT WATER ANNUALLY

THIS PREVENTATIVE MAINTENANCE PLAN IS SUBMITTED BY BRIAN MARTIN  
MARCH 1, 2017

PREVENTATIVE MAINTENANCE PLAN  
MYRON STREET

(HEATED BY GAS)

- INSPECT BOILER ANNUALLY
- CHANGE FILTERS EVERY 3 MONTHS
- INSPECT SUMP PUMP ANNUALLY
- CHANGE BATTERIES IN SMOKE AND CARBON MONOXIDE DETECTORS  
TWICE A YEAR
- INSPECT STRUCTURE ANNUALLY
- INSPECT ELECTRICAL PANEL ANNUALLY
- INSPECT WATER HEATER ANNUALLY

THIS PREVENTATIVE MAINTENANCE PLAN IS SUBMITTED BY BRIAN MARTIN  
MARCH 1, 2017

PREVENTATIVE MAINTANENCE PLAN  
BOUCHARD AVENUE

(HEATED BY GAS)

- INSPECT BOILER ANNUALLY AND HAVE CLEANED
- INSPECT SUMP PUMP
- CHANGE BATTERIES IN SMOKE AND CARBON MONOXIDE DETECTORS  
TWICE A YEAR
- INSPECT STRUCTURE ANNUALLY
- INSPECT ELECTRICAL PANEL ANNUALLY
- INSPECT WATER HEATER ANNUALLY
- INSPECT UNIT ANNUALLY

PREVENTATIVE MAINTENANCE PLAN SUBMITTED BY BRIAN MARTIN  
MARCH 1, 2017

PREVENTATIVE MAINTANENCE PLAN  
VARNUM AVENUE

(HEATED BY OIL)

- INSPECT BOILER ANNUALLY AND HAVE CLEANED

CHANGE BATTERIES IN SMOKE AND CARBON MONOXIDE DETECTORS  
TWICE A YEAR

- INSPECT STRUCTURE ANNUALLY
- INSPECT ELECTRICAL PANEL ANNUALLY
- INSPECT WATER HEATER ANNUALLY
- INSPECT UNIT ANNUALLY
- INSPECT FENCE ANNUALLY

PREVENATATIVE MAINTENANCE PLAN SUBMITTED BY BRIAN MARTIN  
MARCH 1, 2017

PREVENTATIVE MAINTENANCE PLAN  
TURGEON AVENUE

(HEATED BY OIL)

- INSPECT FURNANCE ANNUALLY AND HAVE CLEANED.
- CHANGE FILTER EVERY 3 MONTHS
- CHANGE BATTERIES TWICE A YEAR IN SMOKE AND CARBON MONOXIDE DETECTORS.
- INSPECT STRUCTURE ANNUALLY
- INSPECT ELECTRICAL PANEL ANNUALLY
- INSPECT WATER HEATER ANNUALLY

PREVENTATIVE MAINTENANCE PLAN SUBMITTED BY BRIAN MARTIN  
MARCH 1, 2017

PREVENTATIVE MAINTANENCE PLAN  
SLADEN STREET

(HEATED BY OIL)

- INSPECT BOILER ANNUALLY AND HAVE CLEANED
- INSPECT SUMP PUMP ANNUALLY
- CHANGE BATTERIES IN SMOKE AND CARBON MONOXIDE DETECTORS  
TWICE A YEAR
- INSPECT STRUCTURE ANNUALLY
- INSPECT ELECTRICAL PANEL ANNUALLY
- INSPECT WATER HEATER ANNUALLY
- INSPECT UNIT ANNUALLY

PREVENTATIVE MAINTENANCE PLAN SUBMITTED BY BRIAN MARTIN  
MARCH 1, 2017



PREVENTATIVE MAINTANENCE PLAN  
47 AND 49/ 61 AND 63 HAMPSON STREET

(HEATED BY GAS)

- INSPECT ALL FOUR FURNANCES ANNUALLY AND HAVE CLEANED
- CHANGE FILTERS ON ALL FOUR FURNACES EVERY 3 MONTHS
- CHANGE BATTERIES IN SMOKE AND CARBON MONOXIDE DETECTORS TWICE A YEAR IN ALL FOUR UNITS
- INSPECT BOTH STRUCTURES ANNUALLY
- INSPECT ALL FOUR ELECTRICAL PANELS ANNUALLY
- INSPECT ALL FOUR WATER HEATER ANNUALLY
- INSPECT ALL FOUR UNITS ANNUALLY

PREVENTATIVE MAINTENANCE PLAN SUBMITTED BY BRIAN MARTIN  
MARCH 1, 2017

PREVENTATIVE MAINTENANCE PLAN  
204 PLEASANT STREET (COVENTRY GARDENS)

- HAVE FIRE ALARMS INSPECTED ANNUALLY
- HAVE UNITS INSPECTED ANNUALLY
- INSPECT ELECTRICAL PANEL ANNUALLY

THIS PREVENTATIVE MAINTENANCE PLAN IS SUBMITTED BY BRIAN MARTIN  
MARCH 1, 2017

**Dracut Housing Authority  
Preventative Maintenance  
65 Phineas St, Perron Ln, Bolton Ave, Hildreth St, Tanglewood Dr.**

**January**

- Snow Removal
- Oil/Grease Tractor Snow Thrower
- Clear around Fire Hydrants
- Shampoo Carpet 65 Phineas community room
- Check Salt Inventory
- Exterior light / Photo cells inspection 65 Phineas
- Clean 65 Phineas Community Room/ Weekly
- Clean around Perron Ln Dumpster / Weekly

**February**

- Snow Removal
- Oil/ Grease tractor Snow Thrower
- Clear around Fire Hydrants
- Check Salt Inventory
- Clean 65 Phineas Garage
- Clean 65 Phineas Community Room/ Weekly
- Clean around Perron Ln Dumpster / Weekly

**March**

- Snow Removal
- Oil/Grease Tractor Snow Thrower
- Clear around Fire Hydrants
- Check Salt Inventory
- Repair Plow Divots
- Tune-Ups for Landscaping Equipment
- Check Roofing/Gutters
- Clean 65 Phineas Community Room/ Weekly
- Clean around Perron Ln Dumpster / Weekly

**April**

- Clean/Change Air Filters on Home Furnaces
- Reline Parking spaces
- Repair Damage from Snow Removal
- Repair Damaged Sidewalks
- Repair Damaged Vinyl Siding on Buildings
- Clean Gutters
- Clean 65 Community Room/ Weekly
- Clean around Perron Ln Dumpster / Weekly
- Inspect clean Clubhouse/Swings at 65 Phineas(Cluster 4 and Community Room)

### May

- Paint fence at 65 Phineas
- Paint Benches at 65 Phineas
- Paint light Poles at 65 Phineas
- Prune shrubs
- Plant Annual Flowers/Mulch
- Repair Grass as needed
- Clean 65 Phineas Garage
- Clean 65 Phineas Community Room/ Weekly
- Clean around Perron Ln Dumpster / Weekly

### June

- Trim overgrown Tree limbs
- Clean Dryer Vent
- Clean 65 Phineas Community Room/ Weekly
- Clean around Perron Ln Dumpster / Weekly

### July

- Powerwash buildings as needed at 65 Phineas
- Repair/Replace Damaged traffic or Entrance signs
- Exterior lights/ photo cell inspection 65 Phineas
- Clean 65 Phineas Community Room/ Weekly
- Clean around Perron Ln Dumpster / Weekly

### August

- Clean 65 Phineas Community Room/ Weekly
- Clean around Perron Ln Dumpster / Weekly
- Tune-up Landscaping Equipment
- Clean/Inspect Utility Rooms Phineas Street

### September

- Clean 65 Phineas Community Room/ Weekly
- Clean around Perron Ln Dumpster / Weekly
- Service John Deere tractor and equipment
- Trim overgrowth and greenery

### October

- Clean 65 Phineas Community Room/ Weekly
- Clean around Perron Ln Dumpster / Weekly
- Plant annual Fall Flowers
- Leaf clean up 65 Phineas
- Leaf clean up Perron Ln.
- Clean/Repair Gutters @ Phineas/Perron
- Winterize Clubhouse/Swings Phineas
- Winterize Plows

### November

- Clean 65 Phineas Community Room/ Weekly
- Clean around Perron Ln Dumpster / Weekly
- Leaf clean up 65 Phineas
- Leaf clean up Perron Ln.
- Check Salt Inventory

### **December**

- Clean 65 Phineas Community Room/ Weekly
- Clean around Perron Ln Dumpster / Weekly
- Snow removal
- Clean Dryer Vents
- Winter Decor

### **Inspections:**

- Annual Inspections (Phineas St, Perron Ln, Homes)
- BEF Alarms (Phineas St, Perron Ln)
- Bell Pump (sump pump Perron Ln)
- Lucky Oil ( home boilers – oil)
- ASAP Fire & Safety ( 2-11 Perron Ln, Phineas St)

**Dracut Housing Authority  
Preventative Maintenance  
971 Mammoth Rd**

**January**

- Snow Removal
- Oil/Grease Tractor Snow Thrower
- Clear around Fire Hydrants
- Check Salt Inventory
- Exterior light / Photo cells inspection
- Clean Community Room/ Weekly

**February**

- Snow Removal
- Oil/ Grease tractor Snow Thrower
- Clear around Fire Hydrants
- Check Salt Inventory
- Clean Garage
- Clean Community Room/ Weekly

**March**

- Snow Removal
- Oil/Grease Tractor Snow Thrower
- Clear around Fire Hydrants
- Check Salt Inventory
- Repair Plow Divots
- Set up Outside Water Spickets
- Tune-Ups for Lawn Equipment
- Check Roofing/Gutters
- Clean Community Room/ Weekly

**April**

- Reline Parking spaces
- Repair Damage from Snow Removal
- Repair Damaged Sidewalks
- Repair Damaged Vinyl Siding on Buildings
- Clean Gutters
- Inspect/Clean Swings and Benches

**May**

- Power wash fence on Mammoth Rd
- Power wash Gazebo
- Paint Benches near Community room

- Paint light Poles
- Prune shrubs
- Plant Annual Flowers/Mulch
- Repair Grass as needed
- Check/Repair Pond Dam

### **June**

- Trim overgrown Tree limbs
- Clean Dryer Vent
- Paint railings along stairs

### **July**

- Trim overgrowth around Pond
- Repair/Replace Damaged traffic or Entrance signs
- Exterior lights/ photo cell inspection

### **August**

- Tune-up Landscaping Equipment
- Inspect Pond Pump

### **September**

- Service John Deere tractor and equipment
- Trim overgrowth and greenery

### **October**

- Plant annual Fall Flowers
- Clean/Repair Gutters
- Winterize Swings
- Winterize Plows

### **November**

- Leaf clean
- Check Salt Inventory
- Winterize Outdoor Water Spickets
- A/C covers around Main Office

### **December**

- Winter Decor
- Snow removal
- Clean Dryer Vents

### **Inspections:**

- Annual Inspection
- BEF Alarms

- ASAP Fire & Safety



# **DRACUT HOUSING AUTHORITY MAINTENANCE PLAN**

**APPROVED BY THE BOARD OF COMMISSIONERS ON  
JANUARY 29, 2018**

The Dracut 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 program.

## **1. MAINTENANCE SYSTEM**

The Dracut 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;
- f. A strict enforcement of OSHA guidelines and regulations.

## **PRIORITY SYSTEM**

The work priorities adopted by the Dracut 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 Dracut 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.

## **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 be 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;
- D. Dracut Housing 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**

The Dracut 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, if possible.

## **TRAINING**

***In order to allow its staff members to perform to the best of their abilities, the Dracut 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 the Housing Authority properties can be categorized by the source of the work. Each piece of work originates from either an emergency, 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 Dracut 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 if 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 Dracut 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 order 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 Dracut 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 Supervisor (Deputy Director, Executive Director) is responsible for developing and implementing a system that ensures an average turn-around time of (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 Dracut Housing Authority has established a Vacancy Procedure (see Addendum B).

The 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 Dracut 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 condition, electrical, life safety and plumbing.

## **INSPECTION PROGRAM**

The Dracut 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 Dracut 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 Dracut 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 require 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 Dracut 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 in sections hall note all deficiencies and ensure that these deficiencies are recorded on a work order within twenty-four hours of the inspection. The Dracut Housing Authority will complete all inspection-generated work items within thirty (30) days of the inspection.

Nothing in this policy shall prevent any Dracut 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 appropriate person.

**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 Dracut 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 Dracut 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 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 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 Dracut 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 flowers, shrubbery, beds and trees. Maintenance of benches, fences and snow removal (when required).

### **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 Dracut 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, 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 or responded to before the resident calls.

It is the policy of the Dracut 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 routing and preventive maintenance. By following this procedure, the Dracut 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 way.

### **3. CONTRACTING FOR SERVICES**

The Dracut Housing Authority will contract for maintenance services when it is in the best interest 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 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 Dracut 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.



## WORK ORDER PROCEDURE

All work requests and activities performed by Maintenance Personnel must be recorded on work orders. All requested repairs by residents must be called into the Housing Authority office.

All requests for service will immediately be data entered into the work order system. If an emergency exists, the staff member will immediately notify (by telephone or text) the maintenance staff person who is responsible for that particular project. If for some reason that person is not available the Housing Authority office will notify another maintenance staff person, via telephone or text about the emergency situation.

The Maintenance Personnel will perform the necessary repairs. The maintenance personnel will complete the appropriate section of the work order form with detailed duties performed, denoting number of man hours and materials used. The maintenance staff person will sign the work order indicating work is completed. The completed work order will be given to the Deputy Director who will enter the data and close out the work order in the housing software system.

## WORK ORDER CLASSIFICATION

Work order classification is the most critical item in the prioritization and scheduling of work tasks. Work order classifications and response time recommended standards are as follows:

The following is a list of Maintenance Categories listed in order of priorities for efficiency:

- **Emergency** – work which must be done immediately. Conditions which are immediately threatening to the life or safety of the residents, staff or structures, such as: fires or any kind, gas leaks, electric power failure, broken water pipes, sewer blockage, roof drain blockage, roof leak, security lock failure, no heat, inoperative refrigerator, snow or ice storm. Maintenance personnel should act immediately upon an emergency work order.
- **Preparation of vacant unit** – after emergencies, the preparation of vacant units for immediate re-occupancy should have the highest priority for staff assignments. Vacancy work should not be abandoned when a resident makes a maintenance request that is not a priority/emergency. Vacant units should be prepared within 14 days. This time will vary depending on the scope of work needed to be performed.

- **Preventive Maintenance** – work which must be done to preserve and extend the useful life of various elements of the physical property and to avoid emergency situation as per the Preventive Maintenance Plan.
  
- **Programmed Maintenance** – work orders which are important and should be completed to the greatest extent possible within time and budget constraints.
  - **Routine Work** – includes those tasks that need to be done on a regular basis to keep physical property in good shape, such as picking up litter, sweeping public spaces, cleaning/sharpening tools, attending training sessions, shoveling snow/plowing, raking leaves, maintaining inventory, etc.
  - **Inspections** – Inspections are visual and operational examinations of part of the property to determine conditions, such as; broken windows, dripping faucets, raised tiles, shrubs, trees, lawns, damages in units, boilers, etc.
  
- **Requested Maintenance** – work which is requested by residents or others. Requests from residents or others for maintenance which does not fall into any of the categories above.

Response time standards – attend to within three – seven days.

- **Annual Unit Inspections** – Annual housing inspection work items are those identified during annual unit inspections.

Response time standards – should be completed within 20 days (except for emergencies).

# Unit Turn-over Form

## General Areas (Living room, bedrooms, hallways)

Remove all trash, debris or tenant belongings if left behind in unit. Performed by/Date done:

Remove all electrical covers, door hardware, cabinet hardware, and light fixtures and clean all. Performed by/Date done:

Remove all carpeting or other flooring if replacing as well as vinyl baseboards. Performed by/Date done:

Remove window shades. Repair or replace window locks. Check window balances. Performed by/Date done:

Remove and repair or replace doors if needed. Performed by/Date done:

Repair walls and ceilings and clean if needed. Performed by/Date done:

Paint all walls and ceilings. Performed by/Date done:

Treat, varnish or paint cabinet doors, woodwork, window frames or doors. Performed by/Date done:

## Kitchen

Thoroughly clean all cabinets, countertops, kitchen sink, plumbing fixtures. Repair or replace as needed. Performed by/Date done:

Thoroughly clean range hood and vent filter or replace as needed. Performed by/Date done:

Thoroughly clean and sanitize stove and refrigerator. Repair or replace as necessary:

○ Stove: Replace drip pans, repair or replace stove burners, remove and clean control knobs (replace if not readable), recalibrate oven temperature, check gaskets and repair as needed.

○ Refrigerator: Remove all racks and shelves and clean. Clean inside of freezer and refrigerator thoroughly. Check temperature for both freezer and refrigerator and check door gaskets. Repair or replace as needed.

Performed by/Date done:

## Bathroom

Replace toilet with low-flow toilet if not already done.

Performed by/Date done:

Clean toilet thoroughly. Replace toilet seat (leave plastic on seat cover). Ensure toilet is secure and check water feed line.

Performed by/Date done:

Check all plumbing fixtures: Shower and tub valves are working correctly and are not leaking. Sink faucet is working correctly and is not leaking. Check all drains for leaking or signs of corrosion. Check and ensure all stoppers are working correctly.

Performed by/Date done:

Replace all tooth brush holders and soap dishes as needed. Check, repair, and replace any shower rods, towel racks, toilet paper holders, or grab bars as needed.

Performed by/Date done:

Re-caulk shower walls as needed. Remove any mildewed caulking at top of tubs and sinks, clean all mildew away from surfaces, re-caulk sink and tub to walls. Check caulking at floor and tub. Clean all tub and sink surfaces to remove dirt and any hard water deposits. Clean and shine all fixtures as needed.

Performed by/Date done:

Clean all shower walls, all room walls and ceiling, and floors.

Performed by/Date done:

Clean vanity and medicine cabinet thoroughly. Repair or replace medicine cabinet or vanity as needed.

Performed by/Date done:

## Completion of Turn-over

Repair or replace any VGT/Vinyl flooring as needed.

Performed by/Date done:

Strip and wax any flooring as needed or sand and poly any hardwood floors as needed.

Performed by/Date done:

Repair or replace any carpeting. Shampoo carpets.

Performed by/Date done:

Repair or replace any vinyl baseboards that have been removed.

Performed by/Date done:

Wash and clean all windows and replace window shades.

Performed by/Date done:

Replace locks to unit.

Performed by/Date done:

F. RUSSELL TAYLOR, JR.  
Chairman

DEBRA DEWITT AHERN  
Vice-Chairman

GEORGE M. NANGLE  
Treasurer

JOSSE FORCIER  
Assistant-Treasurer

MATTHEW J. SHEEHAN  
Secretary



MARY T. KARABATSOS  
Executive Director

# DRACUT HOUSING AUTHORITY

971 MAMMOTH ROAD  
DRACUT MASSACHUSETTS 01826

TEL: (978) 957-3515  
FAX: (978) 957-3399

Property	Resident		
Apartment No.	Unit Size	Move-In Inspection Date	Move-Out Inspection Date

Item	Condition		Cost to Correct
	Move-In	Move-Out	
<b>ENTRANCE/HALLS</b>			
Steps and landings			
Handrails			
Doors			
Hardware/Locks			
Floors/Coverings			
Walls/Coverings			
Ceilings			
Windows/Coverings			
Lighting <sup>1</sup>			
Electrical Outlets			
Closets <sup>2</sup>			
Fire alarms/equipment			
<b>LIVING ROOM</b>			
Floor/Coverings			
Walls/Coverings			
Ceiling			
Windows/Covering			
Lighting <sup>1</sup>			
Electrical outlets			

Item	Condition		Cost to Correct
	Move-In	Move-Out	
<b>DINING ROOM</b>			
Floor/Coverings			
Walls/Coverings			
Ceiling			
Windows/Coverings			
Lighting <sup>1</sup>			
Electrical outlets			
<b>KITCHEN</b>			
Range			
Refrigerator			
Sink/Faucets <sup>3</sup>			
Floor/Coverings			
Walls/Coverings			
Ceiling			
Windows/Coverings			
Lighting <sup>1</sup>			
Electrical outlets			
Cabinets			
Closets/Pantry <sup>2</sup>			
Exhaust fan			
Fire alarms/equipment			
<b>BEDROOM(S)</b>			
Doors and locks			
Floor/Coverings			
Walls/Coverings			
Ceiling			
Windows/Covering			
Closets <sup>2</sup>			
Lighting <sup>1</sup>			
Electrical outlets			

Item	Condition		Cost to Correct
	Move-In	Move-Out	
<b>BATHROOM(S)</b>			
Sink/Faucets <sup>3</sup>			
Shower/Tub <sup>3</sup>			
Curtain rack/Door			
Towel rack			
Toilet			
Doors/Locks			
Floor/Coverings			
Walls/Coverings			
Ceiling			
Windows/Coverings			
Closets <sup>2</sup>			
Cabinets			
Exhaust fan			
Lighting <sup>1</sup>			
Electrical outlets			
<b>OTHER EQUIPMENT</b>			
Heating Equipment			
Air-conditioning unit(s)			
Hot-water heater			
Smoke/Fire alarms			
Thermostat			
Door bell			
<b>TOTAL</b>			
1. Fixtures, Bulbs, Switches, and Timers 2. Floor/Walls/Ceiling, Shelves/Rods, Lighting 3. Water pressure and Hot water			

**Move-In**

This unit \*\*is in decent, safe and sanitary condition. \*\* Any deficiencies identified in this report will be remedied within 30 days of the date the tenant moves into the unit.

\_\_\_\_\_

Manager's Signature

I have inspected the apartment and found \*\*this unit to be in decent, safe and sanitary condition. Any deficiencies are noted above.\*\* I recognize that I am responsible for keeping the apartment in good condition, with the exception of normal wear. In the event of damage, I agree to pay the cost to restore the apartment to its original condition.

\_\_\_\_\_

Resident's Signature

\_\_\_\_\_

Resident's Signature

	By	Date
Prepared	_____	_____
Reviewed	_____	_____
Prepared	_____	_____
Reviewed	_____	_____

**Move-Out**

\_\_\_\_\_

Manager's Signature

Agree with move-out inspection

Disagree with move-out inspection

If disagree, list specific items of disagreement.

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Resident's Signature

\_\_\_\_\_

Resident's Signature

	By	Date
Prepared	_____	_____
Reviewed	_____	_____
Prepared	_____	_____
Reviewed	_____	_____



**DRACUT HOUSING AUTHORITY'S  
MAINTENANCE PLAN**

**ADOPTED BY THE BOARD OF COMMISSIONERS  
ON JANUARY 29, 2018**

I, \_\_\_\_\_ HAVE READ THE DRACUT HOUSING  
AUTHORITY'S MAINTENANCE PLAN. I FULLY UNDERSTAND  
THIS POLICY AND WILL ENSURE TO THE BEST OF MY ABILITY TO ADHERE TO THE  
GUIDELINES WITHIN.

\_\_\_\_\_  
**Signature of Maintenance Staff**

\_\_\_\_\_  
**Date**

The Dracut Housing Authority may choose to defer work items due to budget and man power restraints.

The Executive Director and Deputy Director can determine if a maintenance work item may be deferred. If the determination is made to defer a work item, a work order is generated for that item and the item is marked "deferred". No work item will be deferred if the work is determined necessary for decent, safe and sanitary housing standards.

Deferred maintenance item reports will be reviewed by the Executive Director, Deputy Director and Maintenance Staff on a quarterly basis.

The deferred maintenance items will be reviewed prior to capital improvement planning and prior to submission of the budget on an annual basis to determine if the work items need to be grouped and considered for larger modernization projects. Deferred maintenance work items will be kept in an "open" classification until the work is completed.

Adopted by the DHA Board of Commissioners — October 16, 2017

04/12/2022

3:17:23 PM

Kelley

Filter group: BASE WO- Filters

Filter name: Deferred Maintenance

**H.M.S. for Windows**  
**winWORK Work Orders**  
**Work Order Summary Report**

W.O. #	Work to perform	Tenant	Priority	Date Logged	Status	Charges
13673	Holes in the siding at building 11 , bott	Non-dwelling	DM	04-21-2021	Closed	Tenant
13674	Repair winter damage through out, clea	Non-dwelling	DM	04-21-2021	Closed	
13675	Repair spalling and loose cement on ex	Non-dwelling	DM	04-21-2021	Closed	
	<b>Work Orders for</b>	<b>04/21/2021</b>				<b>3</b>
13706	Floor board splinters on deck. Generat	Jeannette L Chandonnet	DM	04-28-2021	Closed	
13707	Floor board splintered on deck. Genera	Colette M Marion	DM	04-28-2021	Closed	
13708	Replace splintered floor board on deck.	Rita E LaBrie	DM	04-28-2021	Closed	
13709	Replaced top rail on deck- splintered.	Dorothy M Potvin	DM	04-28-2021	Closed	
13710	Replace splintered floor boards on dec	Francis E Mahoney	DM	04-28-2021	Closed	
13711	Replace broken spindle on deck. Gene	Patricia Welch	DM	04-28-2021	Closed	
13712	Replace top board on deck rail-deterior	Gertrude Whipple	DM	04-28-2021	Closed	
	<b>Work Orders for</b>	<b>04/28/2021</b>				<b>7</b>
13932	The soffit is rotting on the Club House	Non-dwelling	DM	07-01-2021	Closed	
	<b>Work Orders for</b>	<b>07/01/2021</b>				<b>1</b>
14191	Cabinet door is on order at Home Depo	Sandra Wood	DM	07-16-2021	Closed	
	<b>Work Orders for</b>	<b>07/16/2021</b>				<b>1</b>
14192	The part for the Oven has been ordered	Non-dwelling	DM	08-07-2021	Closed	
	<b>Work Orders for</b>	<b>08/07/2021</b>				<b>1</b>
14403	Remove and install new vinyl sliding d	William E Coffin	DM	09-02-2021	Closed	
14404	Remove and install new vinyl sliding d	Michael Larkin	DM	09-02-2021	Closed	
14405	Remove and install new vinyl sliding d	Denise Milinazzo	DM	09-02-2021	Closed	
14476	Remove and install new vinyl sliding d	Howard L Gordon	DM	09-02-2021	Closed	
	<b>Work Orders for</b>	<b>09/02/2021</b>				<b>4</b>
14193	The bathroom fan has been ordered fro	Madina Kabba	DM	09-10-2021	Closed	
	<b>Work Orders for</b>	<b>09/10/2021</b>				<b>1</b>
14260	Install new door hinges and gaskets for	Judith Gilbert	DM	09-29-2021	Closed	
	<b>Work Orders for</b>	<b>09/29/2021</b>				<b>1</b>
14730	The handrails in the stairwell need to b	Non-dwelling	DM	01-01-2022	Closed	
	<b>Work Orders for</b>	<b>01/01/2022</b>				<b>1</b>

04/12/2022

3:17:23 PM

Kelley

Filter group: BASE WO- Filters

Filter name: Deferred Maintenance

H.M.S. for Windows  
winWORK Work Orders  
Work Order Summary Report

W.O. #	Work to perform	Tenant	Priority	Date Logged	Status	Charges Tenant
14567	The back door in the basement needs to be replaced. <b>Work Orders for</b>	Denise J Huard 01/19/2022	DM	01-19-2022	Closed	
14692	Check flashing on front door. <b>Work Orders for</b>	Lisa DeCosta 02/28/2022	DM	02-28-2022	Open	
14721	There is a piece of board in the boiler room. <b>Work Orders for</b>	Denise J Huard 03/09/2022	DM	03-09-2022	Open	
14738	Please remove the broken pieces of wood. <b>Work Orders for</b>	Non-dwelling 03/18/2022		03-18-2022	Open	

**Tenant Totals:**

**H.A. Totals:**

**Total # of WO: 24**

### 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 09/30/2023. It also shows the approved budget for the current year (2024) 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 Dracut Housing Authority operating reserve at the end of fiscal year 2023 was \$194,435.00, which is 53.1% 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 Dracut Housing Authority.						
<b>REVENUE</b>						
Account Number	Account Class	2023 Approved Revenue Budget	2023 Actual Amounts Received	2024 Approved Revenue Budget	% Change from 2023 Actual to 2024 Budget	2024 Dollars Budgeted per Unit per Month
3110	Shelter Rent -Tenants	\$497,460.00	\$510,149.00	\$536,112.00	5.1%	\$501.98
3111	Shelter Rent - Tenants - Fraud/Retroactive	\$0.00	\$10,872.00	\$0.00	-100%	\$0.00
3115	Shelter Rent -Federal Section 8\MRVP One-time Leased up Rev.	\$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	\$150.00	\$355.00	\$500.00	40.8%	\$0.47
3611	Interest on Investments - Restricted	\$0.00	\$0.00	\$0.00	0%	\$0.00
3690	Other Revenue	\$1,700.00	\$1,445.00	\$1,500.00	3.8%	\$1.40
3691	Other Revenue - Retained	\$5,400.00	\$11,913.00	\$13,600.00	14.2%	\$12.73
3692	Other Revenue - Operating Reserves	\$0.00	\$0.00	\$0.00	0%	\$0.00
3693	Other Revenue - Energy Net Meter	\$5,400.00	\$6,714.00	\$0.00	-100%	\$0.00
3801	Operating Subsidy - EOHLC (4001)	\$182,536.00	\$158,573.00	\$200,774.00	26.6%	\$187.99
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	\$692,646.00	\$700,021.00	\$752,486.00	7.5%	\$704.57

Consolidated Budget (400-1) for all state-aided 667 (Elderly), 200 (family), and 705 (scattered site family) developments owned by Dracut Housing Authority.						
<b>EXPENSES</b>						
Account Number	Account Class	2023 Approved Expense Budget	2023 Actual Amounts Spent	2024 Approved Expense Budget	% Change from 2023 Actual to 2024 Budget.	2024 Dollars Budgeted per Unit per Month
4110	Administrative Salaries	\$70,487.00	\$70,684.00	\$72,602.00	2.7%	\$67.98
4120	Compensated Absences	\$0.00	\$3,049.00	\$0.00	-100%	\$0.00
4130	Legal	\$3,000.00	\$0.00	\$7,000.00	100%	\$6.55
4140	Members Compensation	\$0.00	\$0.00	\$0.00	0%	\$0.00
4150	Travel & Related Expenses	\$923.00	\$-76.00	\$913.00	-1301.3%	\$0.85
4170	Accounting Services	\$8,099.00	\$7,781.00	\$8,100.00	4.1%	\$7.58
4171	Audit Costs	\$8,300.00	\$8,273.00	\$4,500.00	-45.6%	\$4.21
4180	Penalties & Interest	\$0.00	\$0.00	\$0.00	0%	\$0.00
4190	Administrative Other	\$34,920.00	\$35,913.00	\$25,757.00	-28.3%	\$24.12
4191	Tenant Organization	\$0.00	\$0.00	\$0.00	0%	\$0.00
4100	TOTAL ADMINISTRATION	\$125,729.00	\$125,624.00	\$118,872.00	-5.4%	\$111.30
4310	Water	\$54,000.00	\$50,128.00	\$55,000.00	9.7%	\$51.50
4320	Electricity	\$50,000.00	\$46,399.00	\$60,000.00	29.3%	\$56.18
4330	Gas	\$18,000.00	\$17,105.00	\$20,000.00	16.9%	\$18.73
4340	Fuel	\$0.00	\$0.00	\$0.00	0%	\$0.00
4360	Net Meter Utility Debit/Energy Conservation	\$10,800.00	\$13,428.00	\$0.00	-100%	\$0.00
4390	Other	\$7,000.00	\$5,480.00	\$6,000.00	9.5%	\$5.62
4391	Solar Operator Costs	\$7,700.00	\$11,311.00	\$10,000.00	-11.6%	\$9.36
4392	Net Meter Utility Credit (Negative Amount)	\$-18,500.00	\$-24,739.00	\$-10,000.00	-59.6%	\$-9.36
4300	TOTAL UTILITIES	\$129,000.00	\$119,112.00	\$141,000.00	18.4%	\$132.02

Consolidated Budget (400-1) for all state-aided 667 (Elderly), 200 (family), and 705 (scattered site family) developments owned by Dracut Housing Authority.						
<b>EXPENSES</b>						
Account Number	Account Class	2023 Approved Expense Budget	2023 Actual Amounts Spent	2024 Approved Expense Budget	% Change from 2023 Actual to 2024 Budget	2024 Dollars Budgeted per Unit per Month
4410	Maintenance Labor	\$83,602.00	\$87,590.00	\$89,536.00	2.2%	\$83.84
4420	Materials & Supplies	\$30,000.00	\$34,086.00	\$33,500.00	-1.7%	\$31.37
4430	Contract Costs	\$162,600.00	\$163,309.00	\$163,916.00	0.4%	\$153.48
4400	TOTAL MAINTENANCE	\$276,202.00	\$284,985.00	\$286,952.00	0.7%	\$268.68
4510	Insurance	\$24,552.00	\$25,683.00	\$24,800.00	-3.4%	\$23.22
4520	Payment in Lieu of Taxes	\$10,700.00	\$10,700.00	\$10,700.00	0%	\$10.02
4540	Employee Benefits	\$95,800.00	\$92,409.00	\$90,537.00	-2%	\$84.77
4541	Employee Benefits - GASB 45	\$0.00	\$57,926.00	\$0.00	-100%	\$0.00
4542	Pension Expense - GASB 68	\$0.00	\$0.00	\$0.00	0%	\$0.00
4570	Collection Loss	\$0.00	\$1,931.00	\$0.00	-100%	\$0.00
4571	Collection Loss - Fraud/Retroactive	\$0.00	\$10,872.00	\$0.00	-100%	\$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	\$131,052.00	\$199,521.00	\$126,037.00	-36.8%	\$118.01
4610	Extraordinary Maintenance	\$55,741.00	\$51,392.00	\$55,000.00	7%	\$51.50
4611	Equipment Purchases - Non Capitalized	\$7,500.00	\$9,026.00	\$7,500.00	-16.9%	\$7.02
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	\$115,469.00	\$0.00	-100%	\$0.00
4600	TOTAL OTHER EXPENSES	\$63,241.00	\$175,887.00	\$62,500.00	-64.5%	\$58.52
4000	TOTAL EXPENSES	\$725,224.00	\$905,129.00	\$735,361.00	-18.8%	\$688.54



Consolidated Budget (400-1) for all state-aided 667 (Elderly), 200 (family), and 705 (scattered site family) developments owned by Dracut Housing Authority.						
<b>SUMMARY</b>						
Account Number	Account Class	2023 Approved Budget	2023 Actual Amounts	2024 Approved Budget	% Change from 2023 Actual to 2024 Budget	2024 Dollars Budgeted per Unit per Month
3000	TOTAL REVENUE	\$692,646.00	\$700,021.00	\$752,486.00	7.5%	\$704.57
4000	TOTAL EXPENSES	\$725,224.00	\$905,129.00	\$735,361.00	-18.8%	\$688.54
2700	NET INCOME (DEFICIT)	\$-32,578.00	\$-205,108.00	\$17,125.00	-108.3%	\$16.03
7520	Replacements of Equip. - Capitalized	\$10,000.00	\$0.00	\$10,000.00	100%	\$9.36
7540	Betterments & Additions - Capitalized	\$0.00	\$0.00	\$0.00	0%	\$0.00
7500	TOTAL NONOPERATING EXPENDITURES	\$10,000.00	\$0.00	\$10,000.00	100%	\$9.36
7600	EXCESS REVENUE OVER EXPENSES	\$-42,578.00	\$-205,108.00	\$7,125.00	-103.5%	\$6.67

## Explanation of Budget Accounts

The following explains how each of the line items is to be prepared.

3110: Shelter Rent: The shelter rent projection should be based on the current rent roll plus anticipated changes expected from annual rent re-determinations or as a result of regulatory amendments.

3111: Shelter Rent – Tenants - Fraud/Retroactive: This account should be used for the reporting of total rent receipts from residents due to unreported income. These are often called fraud or retroactive balances. In cases where deficit LHAs discover, pursue cases, and have entered into a written fraud/retroactive re-payment agreement **with a present or former tenant who did not report income**, the LHA will be allowed to retain two-thirds of the funds recovered. One third of the total dollar amount recovered should be included in the LHA's quarterly or year-end Operating Statement as Shelter Rent, account #3111, and two-thirds of this total dollar amount should be included in Other Revenue-Retained, account #3691.

3115: Shelter Rent - Section 8: This account applies only to those developments receiving support through the federal government's Housing and Urban Development (HUD) Section 8 New Construction and/or Substantial Rehab Programs.

3190: Non-Dwelling Rental: This account should be credited with the rents, other than tenants rents reported in line 3110 and 3115, including charges for utilities and equipment, billed to lessees of non-dwelling facilities as well as apartments rented for non-dwelling purposes, such as social service programs.

3400: Administrative Fee- MRVP/AHVP: This account should be credited with Administrative Fees to be received for the MRVP/AHVP Program. The MRVP/AHVP administrative fee is \$50.00 per unit per month, as of July 1, 2020.

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

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

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

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

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

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

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

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

3802: Operating Subsidy – MRVP/AHVP Landlords:

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

4520: Payments in Lieu of Taxes:

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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



**Narrative Responses to the Performance Management Review (PMR) Findings**

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

Explanation of PMR Criteria Ratings

CRITERION	DESCRIPTION
<b>Management</b>	
Occupancy Rate	<p>The rating is calculated using the following formula: (Total Number of Occupied units on Monthly Report divided by (Total Number of Units Minus Units that Received a Waiver Minus Number of Units Vacant less than 30 days on Monthly Report)</p> <ul style="list-style-type: none"> <li>• “No Findings” : Occupancy Rate is at or above 98%</li> <li>• Operational Guidance: Occupancy rate is at 95% up to 97.9%</li> <li>• Corrective Action: Adjusted occupancy rate is less than 95%</li> </ul>
Tenant Accounts Receivable (TAR)	<p>This criterion calculates the percentage of uncollected rent and related charges owed by starting with the amount reported by the LHA, as uncollected balances for the TAR (Account 1122 from the Balance Sheet) minus Normal Repayment Agreements* divided by Shelter (Tenant) Rent (account 3110 from the Operating Statement)</p> <ul style="list-style-type: none"> <li>• “No Findings” : At or below 2%</li> <li>• “Operational Guidance” : More than 2% , but less than 5%</li> <li>• “Corrective Action” : 5% or more</li> </ul>
Certifications and Reporting Submissions	<p>Housing authorities are required to submit 4 quarterly vacancy certifications by end of the month following quarter end; 4 quarterly operating statements and 4 Tenant Accounts Receivable (TAR) reports within 60 days of quarter end.</p> <ul style="list-style-type: none"> <li>• “No Findings” : At least 11 of the required 12 reports were submitted and at least 9 were submitted on time.</li> <li>• “Operational Guidance” : Less than 11 of the required 12 reports were submitted and/or less than 9 were submitted on time.</li> </ul>
Board Member Training	<p>Percentage of board members that have completed the mandatory online board member training.</p> <ul style="list-style-type: none"> <li>• “No Findings” : 80% or more completed training</li> <li>• “Operational Guidance” : 60-79.9% completed training</li> <li>• “Corrective Action” : &lt;60 % completed training</li> </ul>
Staff Certifications and Training	<p>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.</p> <ul style="list-style-type: none"> <li>• No Findings: LHAs completed the required number of trainings</li> <li>Corrective Action: LHAs have not completed any trainings</li> </ul>
Annual Plan (AP) Submitted	<p>Housing authorities are required to submit an annual plan every year.</p> <ul style="list-style-type: none"> <li>• “No Findings” =Submitted on time</li> <li>• “Operational Guidance” =Up to 45 days late</li> <li>• “Corrective Action” =More than 45 days late</li> </ul>

CRITERION	DESCRIPTION
<b>CHAMP</b>	
Paper applications	<p>Paper applications are available, received and entered into CHAMP</p> <ul style="list-style-type: none"> <li>• 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</li> <li>• 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</li> </ul> <p>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</p>
Vacancies occupied using CHAMP	<p>Vacancies are recorded correctly and occupied using CHAMP</p> <ul style="list-style-type: none"> <li>• 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</li> <li>• 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</li> <li>• 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</li> </ul>

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

CRITERION	DESCRIPTION
<b>Health &amp; Safety</b>	
Health & safety violations	DHCD has observed conditions at the LHA's developments and reported health and safety violations. The LHA has certified the number of corrected violations in each category.
<b>Facility Management – Inspection Standards and Practices</b>	
100% Unit Inspections	All units inspected at LHA during FY under review <ul style="list-style-type: none"> <li>• No Findings: 100% of units inspected</li> </ul> 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 <ul style="list-style-type: none"> <li>• 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</li> <li>• 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</li> <li>• 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)</li> </ul>
Accuracy of LHA Inspections	Unit inspection reports accurately reflect necessary repairs <ul style="list-style-type: none"> <li>• No Findings: c.667 unit has less than 2 EHS deficiencies and c.200/705 unit has less than 3 EHS deficiencies</li> <li>• Operational Guidance: c.667 unit has 2 EHS deficiencies or c.200/705 has 3 EHS deficiencies</li> </ul> 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
<b>Facility Management – Vacancy Turnover Standards and Practices</b>	

CRITERION	DESCRIPTION
Vacancy Turnover Work Orders	<p>Work orders created for every vacancy and completed within 30 days (or waiver requested)</p> <ul style="list-style-type: none"> <li>• 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 &lt;=30 days for c.667 units or &lt;=45 days for c.200/705 units or have approved waiver</li> <li>• 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</li> </ul> <p>Corrective Action: Vacancy work orders are not created, tracked and reported for every unit; Or vacancy work orders are Maintenance Ready in &gt;45 days for c.667 and &gt;60 days for c.200/705 and have no approved waiver</p>
Accuracy and Standard of Vacancy Turnovers	<p>Vacancy turnover work orders accurately reflect necessary repairs</p> <ul style="list-style-type: none"> <li>• No Findings: c.667 unit less than 2 EHS deficiencies and c.200/705 less than 3 EHS deficiencies</li> <li>• Operational Guidance: c.667 2 EHS deficiencies or c.200/705 3 EHS deficiencies</li> </ul> <p>Corrective Action: c.667 equal to or greater than 3 EHS deficiencies or c.200/705 equal to or greater than 4 EHS deficiencies</p>
<b>Facility Management – Preventative Maintenance Standards and Practices</b>	
LHA Preventative Maintenance Schedule Accuracy and Implementation of Preventative Schedules	<p>LHA preventative maintenance schedule accurately reflects all necessary work to maximize the life of LHA components</p> <ul style="list-style-type: none"> <li>• No Findings: c.667 unit less than 2 EHS deficiencies and c.200/705 less than 3 EHS deficiencies</li> <li>• Operational Guidance: c.667 2 EHS deficiencies or c.200/705 3 EHS deficiencies</li> </ul> <p>Corrective Action: c.667 equal to or greater than 3 EHS deficiencies or c.200/705 equal to or greater than 4 EHS deficiencies</p>
<b>Work Order Types and Systems</b>	
Emergency Work Orders	<p>All emergency work orders are created, tracked, reported and completed within 48 hours</p> <ul style="list-style-type: none"> <li>• No Findings: All emergency work orders under review are created, tracked, reported and completed within 48 hours</li> <li>• 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</li> </ul>

CRITERION	DESCRIPTION
	<ul style="list-style-type: none"> <li>• 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</li> </ul>
Requested Work Orders	<p>All requested work orders are created, tracked, reported and completed within 14 days or added to DM/CIP</p> <ul style="list-style-type: none"> <li>• 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</li> <li>• 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</li> </ul> <p>Corrective Action: Not all requested work orders are completed within 14 days or added to DM/CIP</p>

## Policies

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

<b>Policy</b>	<b>Last Ratified by Board Vote</b>	<b>Notes</b>
*Rent Collection Policy	04/24/1917	
*Personnel Policy	02/22/1916	
*Capitalization Policy	03/21/1916	
*Procurement Policy	02/12/1918	
*Grievance Policy	06/18/1918	
Affirmative Action Policy	10/19/2020	DHA Affirmative Action Policy
Credit/Debit Card Policy	02/22/1916	
Criminal Offender Records Information (CORI) Policy	09/15/2008	
Fair Housing Marketing Plan	05/26/2020	
Sexual Harassment Policy	10/19/2020	DHA Sexual Harassment Policy
Smoking Policy	02/22/2016	
Other – Define in the ‘Notes’ column	09/23/2009	Extermination guidelines
Other – Define in the ‘Notes’ column	12/21/2015	Disposition Policy
Other – Define in the ‘Notes’ column	09/15/2014	Exclusion for Veteran's Disability
Other – Define in the ‘Notes’ column	11/20/2017	Wage Match Policy
Other – Define in the ‘Notes’ column	06/01/2015	Maintenance Uniform Policy



<b>Policy</b>	<b>Last Ratified by Board Vote</b>	<b>Notes</b>
Other – Define in the ‘Notes’ column	09/15/2014	Cell Phone Policy
Other – Define in the ‘Notes’ column	01/23/2017	Dracut Housing Authority By-Laws
Other – Define in the ‘Notes’ column	06/18/2018	Communication Policy
Other – Define in the ‘Notes’ column	01/29/2018	Maintenance Plan
Other – Define in the ‘Notes’ column	03/19/2018	EIV System Security Policy
Other – Define in the ‘Notes’ column	02/25/2019	Section 8 Administrative Plan
Other – Define in the ‘Notes’ column	09/23/2019	DHA Vehicle Policy
Other – Define in the ‘Notes’ column	02/25/2019	Violence Against Women Act
Other – Define in the ‘Notes’ column	02/05/2019	Internal Control & Accounting Policy
Other – Define in the ‘Notes’ column	03/19/2018	DHA Admissions & Continued Occupancy Policy
Fair Housing Marketing Plan	10/19/2020	DHA Fair Housing & Reasonable Accommodations
Other – Define in the ‘Notes’ column	10/19/2020	Resident & Public Participation Policy - Board Meetings
Language Access Plan	04/25/2022	
Reasonable Accommodations Policy	10/19/2020	We will check the date on that and update asap

\* 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**

Dracut 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.

<b>Description</b>	<b>Reason</b>	<b>Date Waiver Approved by DHCD</b>	<b>Date Expired</b>
Waiver to join RCAT	Waited to see how the Program was working.	07/01/2019	

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

## **Attachments**

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

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

- Public Comments
- Cover sheet for tenant satisfaction surveys

June 21, 2024

To Whom It May Concern:

Please be advised that on Monday, June 17<sup>th</sup> a public hearing was held for the Dracut Housing Authority's State Annual Plan. The hearing took place at 5:15 p.m. There were no comments or questions from the public.

Sincerely,

A handwritten signature in black ink that reads "Mary T. Karabatsos". The signature is written in a cursive style with a large initial "M".

Mary T. Karabatsos  
Executive Director



## **Resident Surveys – Background**

Since 2016 DHCD has been working with the Center for Survey Research (CSR) at the University of Massachusetts Boston to survey residents in the state public housing units it oversees. The surveys are confidential, mailed directly to 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).

## **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.

## **Round Three Surveys (2023 – 2027)**

Round Three of the surveys began in 2023. CSR surveyed about one-third of the elderly/disabled units and one-third of family units in Fall 2023. Data has not been received from these recent mailings.