

Overview and Certification

Brockton 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 Brockton 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. RAB letter
 - b. Public Comments and LHA Responses
 - c. Cover sheet for tenant satisfaction surveys

Overview and Certification**State-Aided Public Housing Developments**

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

Dev No	Type	Development Name	Num Bldgs	Year Built	Dwelling Units
667-04	Elderly	CROSBY GARDENS 667-04	1	1982	74
705-2A	Family	GOLDEN CIRCLE 705-2A	8	1956	19
667-02	Elderly	KENNEDY DRIVE 667-02	17	1962	120
667-1A	Elderly	RAINBOW TERRACE 667-1A	10	1957	64
705-01	Family	WALNUT-CROWELL 705-01	9	1982	18
200-02	Family	WASHBURN HEIGHTS 200-02	11	1951	50
	Elderly	Elderly units in smaller developments	1		6
	Other	Special Occupancy units	2		18
Total			59		369

Massachusetts Rental Voucher Program (MRVP)

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

Brockton Housing Authority manages 294 MRVP vouchers.

Federally Assisted Developments

Brockton Housing Authority also manages Federally-assisted public housing developments and/or federal rental subsidy vouchers serving 3835 households.

LHA Central Office

Brockton Housing Authority
 45 Goddard Road, P.O. Box 7070, Brockton, MA, 02303-7070
 Thomas Thibeault, Executive Director
 Phone: 508-588-6880
 Email: tom.thibeault@brocktonhousingauthority.com

LHA Board of Commissioners

	<u>Role</u>	<u>Category</u>	<u>From</u>	<u>To</u>
Taylor Harris	Member		09/29/2023	08/31/2028
Ernest Pettiford	Vice-Chair		04/30/2022	04/30/2027
Carol Roberts	Treasurer	Federal Tenant Rep	02/08/2019	02/08/2024
Timothy Sullivan	Chair	Labor Appointee	06/30/2022	06/30/2027
Janet Trask	Member	State Appointee	12/23/2021	01/12/2025

Resident Advisory Board

	<u>Date of Recognition by LHA</u>	<u>Date LHA Reviewed Draft AP with RAB</u>
Brockton RAB	01/01/1999	09/19/2024

Plan History

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

	REQUIREMENT	DATE COMPLETED
A.	Advertise the public hearing on the LHA website.	07/30/2024
B.	Advertise the public hearing in public postings.	07/30/2024
C.	Notify all LTO's and RAB, if there is one, of the hearing and provide access to the Proposed Annual Plan.	07/30/2024
D.	Post draft AP for tenant and public viewing.	07/31/2024
E.	Hold quarterly meeting with LTO or RAB to review the draft AP. (Must occur before the LHA Board reviews the Annual Plan.)	09/19/2024
F.	Annual Plan Hearing. Hosted by the LHA Board, with a quorum of members present. (For Boston, the Administrator will host the hearing.)	09/26/2024
G.	Executive Director presents the Annual Plan to the Board.	09/26/2024
H.	Board votes to approve the AP. (For Boston Housing Authority, the Administrator approves and submits the AP.)	09/26/2024

Certification

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

I, Thomas Thibeault, Executive Director of the Brockton Housing Authority, certify on behalf of the Housing Authority that I have conducted an annual review of all Brockton 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 Brockton 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, Thomas Thibeault, Executive Director of the Brockton 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: 10/17/2024

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)	\$3,072,493.85		Total of all FF awards minus prior FF spending
LHA Emergency Reserve	\$460,874.08		Amount to reserve for emergencies
Net FF Funds (First 3 Years of the CIP)	\$2,611,619.77	\$2,359,688.21	Funds to plan & amount actually planned in the first 3 years of the CIP
ADA Set-aside	\$5,914.01	\$6,000.00	Accessibility projects
DMH Set-aside	\$10,115.63	\$10,588.00	Dept. of Mental Health facility
DDS Set-aside	\$0.00	\$0.00	Dept. of Developmental Services facility
Unrestricted Formula Funding (FF)	\$2,595,590.13	\$2,343,100.21	Funds awarded by DHCD to be used on projects selected by the LHA and approved by DHCD.
Special DHCD Funding	\$4,291,874.44	\$4,291,874.44	Targeted awards from DHCD
Community Development Block Grant (CDBG) Funds	\$0.00	\$0.00	Federal funds awarded by a city or town for specific projects.
Community Preservation Act (CPA) Funds	\$0.00	\$0.00	Community Preservation Act funds awarded by a city or town for specific projects.
Operating Reserve(OR) Funds	\$0.00	\$0.00	Funds from the LHA's operating budget.
Other Funds	\$0.00	\$0.00	Funds other than those in the above categories. See explanation below.
Total funds and planned spending	\$6,903,494.21	\$6,651,562.65	Total of all anticipated funding available for planned projects and the total of planned spending.

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

Capital Improvement Plan (CIP)

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

Cap Hub Project Number	Project Name	Development(s)	Total Cost	Amount Spent Prior to Plan	Remaining Planned for 2024	fy2025 Planned	fy2026	fy2027	fy2028	fy2029
044088	2nd Flr Balcony Repairs-667-1A	RAINBOW TERRACE 667-1A & KENNEDYdRIVE 667-2	\$919,841	\$772,330	\$0	\$147,512	\$0	\$0	\$0	\$0
044092	Window replacement 667-5	ANN L. WARD HOUSE CONGREGATE 667-05	\$111,139	\$111,139	\$0	\$0	\$0	\$0	\$0	\$0
044095	ARPA FF: Common Entry Door Assembly Replacement 667-1A &667-2	Rainbow 667-1A & Kennedy 667-2	\$1,624,968	\$1,025,158	\$0	\$300	\$0	\$0	\$0	\$0
044096	ARPA FF: 667-2 Kennedy Drive CC Creative Placemaking	KENNEDY DRIVE 667-02	\$1,489,780	\$1,167,174	\$0	\$210,707	\$0	\$0	\$0	\$0
044098	667-1A Rainbow Terrace Roof & Drain RPLMT	RAINBOW TERRACE 667-1A	\$754,800	\$719,153	\$0	\$0	\$0	\$0	\$0	\$0
044099	ARPA Targeted Award: Fire Alarm Rplmt 200-2, 667-4&5,689-1, 705-2A	667-04, 667-05, 689-01, 705-2a	\$2,519,900	\$0	\$0	\$559,504	\$1,955,409	\$0	\$0	\$0
044100	HTP Boiler Warranty Rplcmt 667-4	CROSBY GARDENS 667-04	\$79,450	\$0	\$0	\$79,450	\$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
044101	Chimney replacement & structural repairs 667-1A	RAINBOW TERRACE 667-1A	\$28,287	\$0	\$0	\$27,260	\$1,027	\$0	\$0	\$0
044102	Paving (Rainbow) 667-1A	RAINBOW TERRACE 667-1A	\$177,000	\$0	\$0	\$56,462	\$120,539	\$0	\$0	\$0
044103	Exterior Door Replacement 689-1	EDWINA MARTIN 689-01	\$16,454	\$0	\$0	\$16,454	\$0	\$0	\$0	\$0
044104	Elevator Upgrades 667-5	ANN L. WARD HOUSE CONGREGATE 667-05	\$271,500	\$0	\$0	\$60,744	\$210,757	\$0	\$0	\$0
•	Electrical	WASHBURN HEIGHTS 200-02	\$1,730,290	\$0	\$0	\$0	\$135,037	\$591,686	\$1,003,569	\$0
•	Kitchen and bath upgrade, Building 1	KENNEDY DRIVE 667-02	\$302,500	\$0	\$0	\$0	\$0	\$0	\$144,251	\$158,250
•	Kitchen and bath upgrade, Building 2	KENNEDY DRIVE 667-02	\$302,500	\$0	\$0	\$0	\$0	\$0	\$144,251	\$158,250
•	Kitchen and bath upgrade, Building 3	KENNEDY DRIVE 667-02	\$325,542	\$0	\$0	\$0	\$0	\$0	\$155,239	\$170,304
•	Carpet replacement in apts	CROSBY GARDENS 667-04	\$366,025	\$0	\$0	\$174,544	\$191,482	\$0	\$0	\$0
•	DMH Flooring replacement	Belair Street 689-02	\$10,588	\$0	\$0	\$10,588	\$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
•	Asphalt Pavement Replacement	GOLDEN CIRCLE 705-2A	\$114,744	\$0	\$0	\$114,744	\$0	\$0	\$0	\$0
•	Window Replacement	GOLDEN CIRCLE 705-2A	\$382,345	\$0	\$0	\$182,327	\$200,019	\$0	\$0	\$0

FUNDS IN ADDITION TO ANNUAL FORMULA FUNDING AWARD

Cap Hub Project Number	Project Name	DHCD Special Award Comment	Special DHCD Awards				Other Funding			
			Emergency Reserve	Compliance Reserve	Sustain-ability	Special Awards	CDBG	CPA	Operating Reserve	Other Funds
044095	ARPA FF: Common Entry Door Assembly Replacement 667-1A & 667-2	asbestos removal	\$0	\$104,300	\$0	\$570,000	\$0	\$0	\$0	\$0
044096	ARPA FF: 667-2 Kennedy Drive CC Creative Placemaking	ARPA Formula Funding	\$0	\$0	\$0	\$1,214,826	\$0	\$0	\$0	\$0
044099	ARPA Targeted Award: Fire Alarm Rplmt 200-2, 667-4&5, 689-1, 705-2A	arpa targ	\$0	\$0	\$0	\$2,519,900	\$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.

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

- Other

We are unable to arrange the projects (due to cost constraints of CIMS) to fit exactly in the 3 years' cap share amounts. We're very close.

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.

Brockton Housing Authority has not requested additional funding.

3. Overall goals of the Housing Authority's CIP

There are four large projects involving ARPA funds grants. The bulk of our FF CAP Share will be spent on projects for Roofs (Rainbow Terrace) and Windows (Golden Circle), and one large project for Electrical System replacement at Washburn Heights.

We have two paving projects planned (Rainbow Terrace and Golden Circle). Additional projects include chimney repairs at Rainbow, Elevator upgrades at Ann Ward House, and Carpet replacement in the apartments at Crosby Gardens. And we have the ever-hopeful projects for Kitchen and Bath upgrades at Kennedy Drive.

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 have prioritized the Electrical System at Washburn Heights over the Kitchen remodel at Kennedy Drive. All projects remain in the plan.

5. Requirements of previous CIP approval

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

6. Quarterly capital reports

Our most recent quarterly capital report (form 80 and 90) was submitted on 03/01/2024.

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 09/30/2024.

8. Project priorities

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

9. High priority deficiencies

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

See attached

10. Accessibility

We have identified the following accessibility deficiencies in our portfolio:

ADA hardware and bathrooms.

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

We are installing ADA hardware on the Exterior Door replacement project at our 689-1 development, and ADA-compatible bathrooms in the Creative Placemaking community room improvements.

11. Special needs development

Brockton 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 07/18/2024.

12. Energy and water consumption

Our 12 most recent monthly energy reports are for months 5/2023 to 4/2024.

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
	667-05	667-05		705-2A
		667-1A		667-02
				705-01
				200-02
				667-04
				667-05
				667-1A

The high water numbers are not usage; it is the cost of water/sewer in Brockton.

The high gas and electric usage at 667-05 is based on the calculation of the leased congregate unit (that houses 15 people, but only counts as a single unit).

13. Energy or water saving initiatives

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

14. Vacancy rate

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

3% c. 667 (DHCD Goal 2%)

0% c. 200 (DHCD Goal 2%)

0% c. 705 (DHCD Goal 2%)

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

The vacancy rate is not due to CIP projects.

Maintenance and Repair Plan

Maintenance Objective

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

About This Maintenance and Repair Plan

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

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

Classification and Prioritization of Maintenance Tasks

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

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

Emergency Request System

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

METHOD	CONTACT INFO.	TIMES
Call Answering Service	508-588-6880	All Times
Call LHA at Phone Number	508-588-6880	All Times

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 Brockton Housing Authority main office.

QUALIFYING EMERGENCY WORK REQUESTS
Fires of any kind (Call 911)
Gas leaks/ Gas odor (Call 911)
No electric power in unit
Electrical hazards, sparking outlets
Broken water pipes, flood
No water/ unsafe water
Sewer or toilet blockage
Roof leak
Lock outs
Door or window lock failure
No heat
No hot water
Snow or ice hazard condition
Dangerous structural defects
Inoperable smoke/CO detectors, beeping or chirping
Elevator stoppage or entrapment
Inoperable refrigerator
Assist Public Safety Agencies (Fire Dept, Police, Board of Health)
Any Health and Safety issues related to severe weather events

Normal Maintenance Request Process

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

METHOD	CONTACT INFO.	TIMES
Text Phone Number		
Call Answering Service	508-588-6880	All
Call Housing Authority Office	508-588-6880	All
Submit Online at Website		
Email to Following Email		
Other		

Work Order Management

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

Type of work order system:

Work order classification used:

Emergency	
Vacancy	
Preventative Maintenance	
Routine	
Inspections	
Tenant Requests	

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

C. Our work order process includes the following steps:

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

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

We use HAB for work orders, all types.

Maintenance Plan Narrative

Following are Brockton Housing Authority’s answers to questions posed by DHCD.

A. Narrative Question #1: How would you assess your Maintenance Operations based on feedback you’ve received from staff, tenants, DHCD’s Performance Management Review (PMR) & Agreed Upon Procedures (AUP), and any other sources?

The BHA maintenance staff makes every effort to service the resident’s maintenance requests in a timely manner. Health and safety emergency calls are answered within 24 hours. Feedback has been mostly positive considering the staffing levels available. We had a positive report on our PMR this year. The BHA maintenance department has a very good working relationship with the Brockton Fire Department, Board of Health, City Inspectional Division, and the Utilites Department amongst others to resolve any issues that may arise. Different issues always arise that we will have to deal with and we will always continue to work to improve our operations.

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

The BHA maintenance Department has worked diligently with the maintenance staff and office staff to complete the over 14,000 work orders that we receive annually and to get the open work orders to acceptable levels. There are no changes with our vacancy crew. The vacancies are being turned around at acceptable levels. Vacancy waivers are being requested on state units as needed with no penalties attached.

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

Our focus is to work to get all the outstanding annual inspection work orders completed. We are working on a plan with maintenance staff and the Asset Managers for scheduling work and proper tenant notification to complete any open annual inspection work orders. The Maintenance staff along with the Asset Managers completed the 3-day NSPIRE inspection training earlier this year and are all certified.

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	\$886,747.00	\$50,000.00
Last Fiscal Year Actual Spending	\$1,247,715.00	\$100.00
Current Fiscal Year Budget	\$971,821.00	\$50,000.00

E. Unit Turnover Summary

# Turnovers Last Fiscal Year	38
Average time from date vacated to make Unit "Maintenance Ready"	16 days
Average time from date vacated to lease up of unit	21 days

Attachments

These items have been prepared by the Brockton 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.

Brockton Housing Authority

Maintenance Plan 2021

Brockton Housing Authority

Maintenance Plan

Table of Contents

MAINTENANCE PLAN DOCUMENT - DESCRIPTION, INSTRUCTIONS.....	1
SECTION 1 - MAINTENANCE PLAN SUMMARY.....	2
Housing Authority General Maintenance & Repair Statement of Priorities.....	3
Emergency Response System-Standard Operating Procedure (SOP) (2 pages).....	4
Normal Maintenance Response System-Standard Operating Procedure (SOP).....	6
Maintenance Plan Narrative.....	7
Work Order Management.....	8
SECTION 2 - MAINTENANCE SCHEDULES AND CHECKLISTS	
Preventive Maintenance Schedule and Checklist.....	9
Routine Maintenance Schedule and Checklist.....	17
Unit Inspection Schedule - Buildings, Grounds and Units.....	20

Housing Authority General Maintenance & Repair Statement of Priorities

- I. **Emergencies** ■ Emergencies are only those conditions which are immediately threatening to the life or safety of our residents, staff, or structures.
 - Goal: initiated with 24 to 48 hours.
- II. **Vacancy Refurbishment** ■ Work necessary to make empty units ready for new tenants.
 - After emergencies the refurbishment of vacancies for immediate re-occupancy has the highest priority for staff assignments. Everyday a unit is vacant is a day of lost rent.
 - Goal: vacancy work orders are completed within 30 calendar days or if not completed within that timeframe, LHA has a waiver.
- III. **Preventive Maintenance** - Work which must be done to preserve and extend the useful life of various elements of your physical property and avoid emergency situations.
 - A thorough Preventive Maintenance Program and Schedule that deals with all elements of the physical property is provided later in the document.
 - The Preventive Maintenance Program is reviewed and updated annually and as new systems and facilities are installed.
- IV. **Programmed Maintenance** - Work which is important and is completed to the greatest extent possible within time and budget constraint. Programmed maintenance is grouped and scheduled to make their completion as efficient as possible. Sources of programmed maintenance include:
 - i. 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.)
 - ii. Inspections are the other source of programmed maintenance.
 - Inspections are visual and operational examinations of parts of our property to determine their condition.
 - All dwelling units, buildings and properties must be inspected at least annually.
 - Goal: Inspection work orders are completed within 30 calendar days from the date of inspection. There may be exceptions to this goal where emergencies such as Excessive snow removal or a large number of vacant units become available that will cause the inspection work orders to delay. If it is determined by the Authority that the inspection work order cannot be completed in the regular operations of the Authority they will be 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 will be addressed in a professional and efficient manner. If the request cannot be completed due to budget constraints the resident will be informed and the Authority will determine if it should become part of the Capital plan discussion with the residents.
 - 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 may be added and completed in a timely manner as a part of the Deferred Maintenance Plan and/or CIP.

~~Emergency Response System - Standard Operating Procedure (SOP) (2 pages)~~

Emergency Response System - Two Key Parts:

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

System for Responding to Emergencies:

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

YES	NO
X	

2. List of Emergencies.

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

EMERGENCY
Fires of any kind
Gas leaks
Fire Alarm trouble in building and or inoperable smoke/CO in unit
Electric power failures ONLY if the whole unit or building is affected
Elevator stoppage
Broken water pipes
Sewer blockage
Toilet clogs
Roof drain blockage
Roof leak
Security lock failure
Lock outs
No heat
Inoperative refrigerator only if following day is NOT a regular business day
Snow or ice storm
Structural Deficiencies
Assist Public Safety Agencies (Fire Dept. Police Board of Health) with health and safety issues
Any Health and Safety issues related to severe weather events

Maintenance Plan Summary

NOT CONSIDERED EMERGENCIES	
Faucet Dripping	A Hole in the Wall
Closet Door off Track	The Door Squeaks
Screen Hs Hole in it	There are Cob Webs in the Corner
Stove Burner Is not Working	The Paint is Peeling

3. How can tenants get in contact with the LHA if they have an Emergency anytime of day or night?

(Complete all that apply and fill in the accompanying details)

METHOD	CONTACT INFO	TIMES
Can Call (Answering Service) at Phone Number	508-583-5645	Weekdays 4:30pm-8:00am Weekend & Holidays 24 Hours

4. Has LHA distributed this Emergency Contact procedure to:

	YES	NO
Tenants	X	
Staff	X	
Answering Service (if applicable)	X	

Normal Maintenance Response System - Standard Operating Procedure (SOP)

Non-Emergency Response System:

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

System for Responding to Non-Emergencies:

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

YFS	NO
X	

2. How can tenants get in contact with the LHA if they have a ~~Jtoi-Ememery~~ emergency anyime of day or night?
(check all that apply and fill in the accompanying details)

METHOD	CONTACT INFO.	TIMES
Can Call (Answering Service) at Phone Number	508-583-5645	4:30pm-8:00am M-F 24 hours on weekends and holidays
Can Call LHA at Phone Number	508-583-5645	8:00am to 4:30pm PM Monday-Friday

3. Has LHA distributed this Contact procedure to:

	YES	NO
Tenants	X	
Staff	X	
Answering Service (if applicable)	X	

Maintenance Plan Summary

Maintenance Plan Narrative

Narrative Question # 1	How would you assess your Maintenance Operations based on feedback your received from staff, tenants, DHCP (PMR & AUP), and any other sources?
Work orders are done in a timely manner, We respond to emergencies immediately, Maintenance & vacancy turnaround times are completed within time frames allotted.	

Narrative Question # 2	What changes have you made to maintenance operations since your last Annual Plan submission?

Narrative Question # 3	What are your maintenance goals for this coming year?
To improve on dispatching work orders and closing completed work orders more efficiently using technology that is available.	

y Maintenance Budget Summary			
	Overall Budget	Extraordinary Maintenance	Date
Current Fiscal Year Budget	\$5,119,231		6/30/2021
Current Fiscal Year Spent to date	\$3,245,831		6/30/2021

A Unit Summary	
//Turnovers last Fiscal year	45
Average time to make Unit "Maintenance Ready"	22
Average time to Lease -up unit	

Additional LN A Comments

Maintenance Plan Summary

Work Order Management

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

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

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

Emergency	X
Vacancy	x
Preventive Maintenance	X
Inspections	X
Routine	X
Tenant Requests	X
Other-Please specify BHA Requests	X

Work Order Process:

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

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

Preventive Maintenance Schedule and Checklist

Maintenance Schedules and Checklists

Trash / Recycling Room														
TASK	Frequency	By	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec
Clean, mop floor, wash out containers	Daily	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Cans (Trash/Recycle) - Regular pickup	Bi-Weekly/ Weekly	Vendor	X	X	X	X	X	X	X	X	X	X	X	X
Landscaping														
Aerate lawn/overseed/top dress with compost	N/A													
Mulch landscape beds	Annually	Staff/ Vendor				X								
Shrubs, Trees (remove broken, dead, deformed branches)	Weekly / Seasonal	Staff/ Vendor	X	X	X	X	X	X	X	X	X	X	X	X
Remove weeds (don't let weeds go to seed)	As Needed	Staff/ Vendor	X	X	X	X	X	X	X	X	X	X	X	X
Protect Shrubs (winter)	N/A													
Pest / Disease - Monitor, Integrated Pest Mgmt. & Natural Gardening. DON'T use products harmful to environment	As Needed	Vendor				X	X	X	X	X	X	X		
Watering/Irrigation - soak (dryout before watering again)	N/A													
Irrigation System														
Spring (Start) / Fall (Shutdown) - blow out lines	N/A													
Grounds														
Signage - inspect, clean, repair as needed	Monthly	Staff/ Vendor	X	X	X	X	X	X	X	X	X	X	X	X
Walks, Paving, Curbs - monitor, clean, repair as needed	Monthly	Staff/ Vendor	X	X	X	X	X	X	X	X	X	X	X	X
Parking Lot - Monitor condition, clean and reseal as needed	Annually	Staff/ Vendor									X			
Fence - monitor condition, clean and repaint as needed	Annually	Staff/ Vendor				X								

Maintenance Schedules and Checklists

Mechanical, Electrical Systems Preventive Maintenance															
HVAC (Heating, Ventilation, Air Conditioning)															
TASK	Frequency	By	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec	
FURNACE, AHU-Filter Changing / Cleaning, Service	Annually	Staff/ Vendor									X				
FCU, Window AC Filters, Duct Cleaning - Clean. Replace as needed	Annually	Vendor					X						X		
Air Source Heat Pumps - Check Oil	N/A														
Co-Gen System	Bi-Annually	Vendor					X						X		
Water system															
Test/Check Water Temperatures	Bi-Annually / Annually	Staff					X					X			
Lubricate valves and pumps	Bi-Annually	Vendor					X					X			
Clean, Test integrity, Change Washers	As Needed	Staff													
Test pressure	As Needed	Vendor	X	X	X	X	X	X	X	X	X	X	X	X	
Plumbing															
Toilets - check for leaks, running water	Annually	Staff													
Faucets and shut-offs - check for leaks, drips	Annually	Staff						X							
Boilers/HW Tanks - Inspect, service	Quarterly	Staff/ Vendor			X			X			X			X	
Pumps-sump pump in basement, confirm operational	Monthly	Staff	X	X	X	X	X	X	X	X	X	X	X	X	
Fire Sprinklers															
Inspect, Test Backflow	Annually	Vendor						X							
Sanitary system															
Clean, Lubricate valves and pumps	Bi-Annually	Vendor					X					X			
Replace toilet mechanism	Every 5yrs	Vendor									X				
Test system integrity	Annually	Vendor									X				

Maintenance Schedules and Checklists

Storm drain system														
TASK	Frequency	By	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec
Clean, Lubricate valves and pumps	Bi-Annually	Vendor					X					X		
Test system integrity	Annually	Staff/ Vendor									X			
Electrical system														
Tighten connections to electrical panels	As Needed	Vendor	Recommended by DHCD's Handbook. However, if this was never performed, then it should be performed by licensed EC after an infrared test by a Testing Company											
Clean, Test	As Needed	Vendor												
Fire Alarms														
System (Hardwired) - Clean, Test	Annually	Vendor							X					
Fire Extinguishers - Test, Recharge, Replace (if necessary)	Annually	Vendor							X					
Generator														
Test	Weekly	Automatic	X	X	X	X	X	X	X	X	X	X	X	X
Lubricate	Every 10hrs use	Vendor												
Small Generators	Monthly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Emergency Lighting (Not on Generator)														
Recharge batteries	Annually	Staff							X					
Test	Quarterly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
ALL Light Fixtures														
Lighting - clean fixtures, replace lamps as needed	Monthly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Security systems														
Test system	Monthly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Elevator system														
Test lights	Monthly	Vendor	X	X	X	X	X	X	X	X	X	X	X	X
Mechanical - professional service contract	Quarterly / Annually	Vendor			X			X			X			X
Solid waste disposal system														
Clean compactors, Lubricate machinery	Monthly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Lubricate trash chute doors	Bi-Annually	Vendor				X						X		

Maintenance Schedules and Checklists

Dwelling Unit Preventive Maintenance														
Heat and smoke detectors														
TASK	Frequency	By	J a n	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Battery Heat / Smoke Detectors - Test, Change batteries	Annually	Staff									X			
Test hardwired detectors (with System)	Annually	vendor									X			
Pest control														
Notify Residents, Install Chemicals	Weekly or As Needed	Vendor		X	X	X	X	X	X	X	X	X	X	X
Floors														
Refinish floors	At Turnover													
Ceilings														
Refinish	At Turnover													
Walls														
Refinish	At Turnover													
Re-caulk (kitchen and bath)	At Turnover													
Kitchen fixtures														
KITCHEN - Clean Range, Microwave, Refrigerator	At Turnover	Staff												
GAS STOVE - Valve and line cleaning	As Needed	Vendor												
UNIT APPLIANCES-clean interior and exterior, vacuum under and behind	As needed	Resident												
HVAC fixtures														
Air Source Heat Pumps - Vacuum, Clean Condenser	N/A													
Unit Forced Hot Water - Check for Air locks. Bleed	Annually	Staff									X	X		
Unit Electrical Baseboard- Vacuum around fins	Annually	Staff										X		
Unit Forced Hot Air - Vacuum Vents	Annually	Resident										X		
Unit Bathroom Fans - Inspect, Vacuum, Clean covers	Annually	Vendor						X						

Maintenance Schedules and Checklists

Machine Preventive Maintenance															
Automobile															
TASK	Frequency	By	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec	
Lubricate, Change Filters	Per Manufacturers Recommendations	Vendor Staff										X			
Change tires	Rotate Annually	Vendor										X			
Replace brakes, other fixed life parts	Per Manufacturers Recommendations	Vendor Staff										X			
Change brushes on sweepers	Annually	Staff												X	
Annual Sticker (Vehicles, Trailers)	Annually	Vendor													
Small Engines															
ALL WORK by Staff	Per Manufacturers Recommendations	Staff													
OIL - Check Level, Change, Replace Filter	Per Manufacturers Recommendations	Staff													
Air Filter - Replace Foam/Paper Air cleaner	Per Manufacturers Recommendations (OR Every Season)	Staff													
Replace Spark Plug, In-line Fuel Filter	Per Manufacturers Recommendations (OR Every 100 Hrs)	Staff													
Prep Work Season Start, Season End)	Bi-Annually or as Needed	Staff									X	X			
Snow Removal and Sanding Equipment	Annually	Staff									X	X			

Routine Maintenance Schedule and Checklist

Maintenance Schedules and Checklists

Building Routine Maintenance														
Building Interior														
TASK	Frequency	By	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Hallways, Stairs, Lobbies, Community Rm - Vacuum carpet, mop floors, sweep and Vacuum public spaces	Daily	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Wash windows in public areas	Weekly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Toilets - Clean public toilets/restrooms	Daily	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Clean Staff toilets/restrooms	Daily	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Offices- Sweep 7 Vacuum offices	Daily	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Light Bulbs - Replace if burnt out in common areas and offices	Weekly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Elevators- Clean cab walls and doors	Daily	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Sweep / Mop/Vacuum elevator floors	Daily	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Trash Chutes, Dumpsters- Clean trash chutes	Daily	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Clean dumpster areas	Daily	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Other Routine Maintenance														
Inventory, Equipment & Vehicles														
TASK	Frequency	By	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Service & Repair Snowblowers	Annually	Staff									X			
Service & Repair Plows	Annually	Staff									X			
Routine Service on Vehicles	As Needed	Staff												
Clean and sharpen tools	As Needed	Staff												
NOTE: Routine (and Emergency) Work Orders will be created due to results from Inspections Maintenance Tasks.														

Unit Inspections Schedule

Dwelling Unit Inspections Schedule and Checklist														
LHA NAME: Brockton			Year:2020											
TASK	Frequency	By	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Rainbow Terrace-667-1 A														
Buildings 1 & 2	Annually	Managers	X											
Buildings 3 & 4	Annually	Managers		X										
Buildings 5 & 6	Annually	Managers			X									
Buildings 7 & 8	Annually	Managers				X								
Kennedy Drive-667-2														
Buildings 1 & 2 & 3 & 4	Annually	Managers					X							
Buildings 5 & 6 & 7 & 8	Annually	Managers						X						
Buildings 9 & 10 & 11 & 12	Annually	Managers							X					
Buildings 13 & 14 & 15	Annually	Managers								X				
Crosby Gardens-667-4														
MI 74 Units	Annually	Managers									X			
Washburn Heights-200-2														
MI 50 Units	Annually	Managers										X		
Golden Circle-705-2A														
MI 19 Units	Annually	Managers											X	
Walnut/Crowell- 705-1														
MI 18 Units	Annually	Managers											X	
25-27 Turner 15-17 Essex														
33-35 West Chestnut 705-3													X	
MI 6 Units	Annually	Managers											X	
Heat and smoke detectors														
TASK	Frequency	By	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec
Battery Heat / Smoke Detectors - Inspect Condition	Annually	Managers				X						X		
Inspect System Heat detectors (in Units)	Annually	Vendor				X						X		
Pest control	Monthly / Quarterly	Vendor	X	X	X	X	X	X	X	X	X	X	X	X
Inspect Unit														
Floors, Ceilings, Walls														
Floors (Wood, Vinyl, Tile)	Annually					X					X			
Kitchen fixtures														
KITCHEN-Inspect Appliances	Annually	Managers				X					X			

Main tenants schedules and Checklists

GAS STOVE - Inspect	Bi-Annually/ Annually	Vendor									X			
Kitchen, Bath - Cabinets, fixtures	Bi-Annually/ Annually	Managers				X					X			
HVAC fixtures														
Bath Fans	Annually	Vendor										X		
Fans, Baseboard, Vents - Inspect (dust, debris)	Annually	Managers				X					X			

Submitted By:

BHA Executive Director

Date

Thomas G. Thibeault

Print Name

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 12/31/2023. 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 Brockton Housing Authority operating reserve at the end of fiscal year 2023 was \$99,394.00, which is 6.7% 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 Brockton Housing Authority.						
REVENUE						
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	\$1,525,500.00	\$1,680,511.00	\$1,655,000.00	-1.5%	\$368.76
3111	Shelter Rent - Tenants - Fraud/Retroactive	\$0.00	\$0.00	\$0.00	0%	\$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	\$200.00	\$28,875.00	\$25,000.00	-13.4%	\$5.57
3611	Interest on Investments - Restricted	\$0.00	\$0.00	\$0.00	0%	\$0.00
3690	Other Revenue	\$15,600.00	\$84,608.00	\$15,000.00	-82.3%	\$3.34
3691	Other Revenue - Retained	\$3,250.00	\$2,065.00	\$7,000.00	239%	\$1.56
3692	Other Revenue - Operating Reserves	\$0.00	\$0.00	\$0.00	0%	\$0.00
3693	Other Revenue - Energy Net Meter	\$3,250.00	\$2,065.00	\$0.00	-100%	\$0.00
3801	Operating Subsidy - EOHLC (4001)	\$1,427,241.00	\$1,124,634.00	\$1,330,418.00	18.3%	\$296.44
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	\$2,975,041.00	\$2,922,758.00	\$3,032,418.00	3.8%	\$675.67

Consolidated Budget (400-1) for all state-aided 667 (Elderly), 200 (family), and 705 (scattered site family) developments owned by Brockton Housing Authority.						
EXPENSES						
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	\$347,570.00	\$276,623.00	\$368,102.00	33.1%	\$82.02
4120	Compensated Absences	\$0.00	\$43,563.00	\$0.00	-100%	\$0.00
4130	Legal	\$23,000.00	\$7,881.00	\$23,000.00	191.8%	\$5.12
4140	Members Compensation	\$5,200.00	\$5,562.00	\$5,700.00	2.5%	\$1.27
4150	Travel & Related Expenses	\$2,411.00	\$838.00	\$2,521.00	200.8%	\$0.56
4170	Accounting Services	\$18,000.00	\$13,456.00	\$18,000.00	33.8%	\$4.01
4171	Audit Costs	\$11,750.00	\$14,510.00	\$4,000.00	-72.4%	\$0.89
4180	Penalties & Interest	\$0.00	\$0.00	\$0.00	0%	\$0.00
4190	Administrative Other	\$165,554.00	\$108,437.00	\$157,963.00	45.7%	\$35.20
4191	Tenant Organization	\$1,760.00	\$0.00	\$1,760.00	100%	\$0.39
4100	TOTAL ADMINISTRATION	\$575,245.00	\$470,870.00	\$581,046.00	23.4%	\$129.47
4310	Water	\$325,032.00	\$323,165.00	\$300,157.00	-7.1%	\$66.88
4320	Electricity	\$316,373.00	\$288,178.00	\$371,993.00	29.1%	\$82.89
4330	Gas	\$131,944.00	\$113,634.00	\$166,984.00	46.9%	\$37.21
4340	Fuel	\$0.00	\$0.00	\$0.00	0%	\$0.00
4360	Net Meter Utility Debit/Energy Conservation	\$0.00	\$4,129.00	\$0.00	-100%	\$0.00
4390	Other	\$0.00	\$0.00	\$0.00	0%	\$0.00
4391	Solar Operator Costs	\$7,000.00	\$9,862.00	\$8,000.00	-18.9%	\$1.78
4392	Net Meter Utility Credit (Negative Amount)	\$-7,000.00	\$-13,991.00	\$-8,000.00	-42.8%	\$-1.78
4300	TOTAL UTILITIES	\$773,349.00	\$724,977.00	\$839,134.00	15.7%	\$186.97

Consolidated Budget (400-1) for all state-aided 667 (Elderly), 200 (family), and 705 (scattered site family) developments owned by Brockton Housing Authority.						
EXPENSES						
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	\$351,089.00	\$230,088.00	\$347,895.00	51.2%	\$77.52
4420	Materials & Supplies	\$145,812.00	\$208,726.00	\$215,080.00	3%	\$47.92
4430	Contract Costs	\$389,846.00	\$808,901.00	\$408,846.00	-49.5%	\$91.10
4400	TOTAL MAINTENANCE	\$886,747.00	\$1,247,715.00	\$971,821.00	-22.1%	\$216.54
4510	Insurance	\$109,914.00	\$122,445.00	\$142,230.00	16.2%	\$31.69
4520	Payment in Lieu of Taxes	\$15,000.00	\$13,363.00	\$15,120.00	13.1%	\$3.37
4540	Employee Benefits	\$393,671.00	\$235,732.00	\$395,814.00	67.9%	\$88.19
4541	Employee Benefits - GASB 45	\$0.00	\$310,303.00	\$0.00	-100%	\$0.00
4542	Pension Expense - GASB 68	\$0.00	\$240,302.00	\$0.00	-100%	\$0.00
4570	Collection Loss	\$20,000.00	\$157,075.00	\$50,000.00	-68.2%	\$11.14
4571	Collection Loss - Fraud/Retroactive	\$0.00	\$0.00	\$0.00	0%	\$0.00
4580	Interest Expense	\$0.00	\$0.00	\$0.00	0%	\$0.00
4590	Other General Expense	\$0.00	\$0.00	\$0.00	0%	\$0.00
4500	TOTAL GENERAL EXPENSES	\$538,585.00	\$1,079,220.00	\$603,164.00	-44.1%	\$134.39
4610	Extraordinary Maintenance	\$50,000.00	\$100.00	\$50,000.00	49900%	\$11.14
4611	Equipment Purchases - Non Capitalized	\$32,000.00	\$700.00	\$32,000.00	4471.4%	\$7.13
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	\$538,597.00	\$0.00	-100%	\$0.00
4600	TOTAL OTHER EXPENSES	\$82,000.00	\$539,397.00	\$82,000.00	-84.8%	\$18.27
4000	TOTAL EXPENSES	\$2,855,926.00	\$4,062,179.00	\$3,077,165.00	-24.2%	\$685.64

Consolidated Budget (400-1) for all state-aided 667 (Elderly), 200 (family), and 705 (scattered site family) developments owned by Brockton Housing Authority.						
SUMMARY						
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	\$2,975,041.00	\$2,922,758.00	\$3,032,418.00	3.8%	\$675.67
4000	TOTAL EXPENSES	\$2,855,926.00	\$4,062,179.00	\$3,077,165.00	-24.2%	\$685.64
2700	NET INCOME (DEFICIT)	\$119,115.00	\$-1,139,421.00	\$-44,747.00	-96.1%	\$-9.97
7520	Replacements of Equip. - Capitalized	\$0.00	\$0.00	\$0.00	0%	\$0.00
7540	Betterments & Additions - Capitalized	\$0.00	\$0.00	\$0.00	0%	\$0.00
7500	TOTAL NONOPERATING EXPENDITURES	\$0.00	\$0.00	\$0.00	0%	\$0.00
7600	EXCESS REVENUE OVER EXPENSES	\$119,115.00	\$-1,139,421.00	\$-44,747.00	-96.1%	\$-9.97

Explanation of Budget Accounts

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

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

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

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

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

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

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

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

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

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

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

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

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

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

3802: Operating Subsidy – MRVP/AHVP Landlords:

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

4520: Payments in Lieu of Taxes:

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

Narrative Responses to the Performance Management Review (PMR) Findings

The Performance Management Review conducted by the Department of Housing and Community Development (DHCD) for the 2023 LHA fiscal year resulted in the following ratings. Criteria which received a 'Corrective Action' rating show both a reason for the rating and a response by the LHA. The reason indicates Brockton Housing Authority's understanding of why they received the rating, while the responses describe their goals and the means by which they will meet or improve upon the performance-based assessment standards established by DHCD in the PMR. When the PMR rating is 'Operational Guidance', the LHA may have responded, but was not required to.

Category: Management

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

Rating: No Findings

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

Rating: Corrective Action

Reason: The Brockton Housing Authority received a corrective action rating for Tenants Accounts Receivables (TAR) due to the 4th quarter report being submitted 1 day late. The final step to submit the quarterly report was inadvertently missed resulting in the report being deemed late.

Response: Staff is aware of the issue and is confident that moving forward that all submission steps will be completed within 60 days of the quarter end.

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

Rating: Operational Guidance

Criterion: Completion of mandatory online board member training

Rating: No Findings

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

Rating: No Findings

Criterion: Staff completed relevant certifications or trainings

Rating: No Findings

Category: Financial

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

Rating: No Findings

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

Rating: Corrective Action

Reason: The Brockton Housing Authority received a corrective action rating for Operating Reserve because reserve levels did not meet the minimum required amount. The Authority's State portfolio is aging which is resulting in maintenance expenses exceeding income.

Response: The Authority is working closely with EOHLA to supplement the reserve levels as funds become available.

Category: Capital Planning

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

Rating: Operational Guidance

Category: CHAMP

Criterion: Paper applications are available, received and entered into CHAMP

Rating: No Findings

Criterion: Vacancies are recorded correctly and occupied using CHAMP

Rating: Corrective Action

Reason: The Brockton Housing Authority received a corrective action rating for Champ Criteria 2a because of how our software system (HAB) was reporting transfers.

Response: The information was reported correctly in HAFIS but HAB was not accurately recording transfers. The software issue has been resolved and vacancy data will be correctly submitted within 30 days.

Category: Facility Management - Inspection Standards and Practices

Criterion: 100% of units inspected during FYE under review

Rating: No Findings

Criterion: Unit inspection reports create, track, and report work orders for inspection repairs, and inspection WOs completed within 30 days or add to DM / CIP

Rating: Operational Guidance

Criterion: Unit inspection reports accurately reflect necessary repairs

Rating: No Findings

Category: Facility Management - Vacancy Turnover Standards and Practices

Criterion: Work orders created for every vacancy and completed within 30 days (or waiver requested)

Rating: No Findings

Criterion: Vacancy turnover work orders accurately reflect necessary repairs

Rating: No Findings

Category: Facility Management - Preventive Maintenance Standards and Practices

Criterion: LHA Preventive Maintenance Plan accurately reflects all necessary work to maximize life of LHA components

Rating: No Findings

Category: Facility Management - Work Order Types and Systems

Criterion: All emergency work orders are created, tracked, reported and completed within 48 hours

Rating: No Findings

Criterion: All requested work orders are created, tracked, reported and completed within 14 days or added to DM/CIP

Rating: No Findings

Explanation of PMR Criteria Ratings

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

CRITERION	DESCRIPTION
CHAMP	
Paper applications	<p>Paper applications are available, received and entered into CHAMP</p> <ul style="list-style-type: none"> • No Findings: Paper applications are available; And paper applications are date and time stamped correctly; And 90% of new paper applications are entered into CHAMP within 15 calendar days of date/time stamp; And 2% or less of new paper applications are entered more than 30 days after date/time stamp • Operational Guidance: Paper applications are available; And paper applications are date and time stamped and entered correctly; And 75% - 89% of new paper applications are entered into CHAMP within 15 calendar days; And 3% - 5% of new paper applications are entered more than 30 days after date/time stamp <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"> • No Findings: All vacancies during the fiscal year are recorded in DHCD's Housing Applications Vacancy System within 30 days; And the housed Applicant ID and Pull List ID match between DHCD's Housing Applications Vacancy System and CHAMP for unit occupied during the fiscal year, excluding administrative transfers; And 25% or less of occupied units have data entry errors • Operational Guidance: All vacancies during the fiscal year are recorded in DHCD's Housing Applications Vacancy System, all vacancies are not recorded within 30 days; Or the Housed Applicant ID and Pull List ID match between DHCD's Housing Applications Vacancy System and CHAMP for units occupied during the fiscal year, excluding administrative transfers; And greater than 25% of occupied units have data entry errors • Corrective Action: All vacancies during the fiscal year are not recorded in DHCD's Housing Applications Vacancy System; Or the Housed Applicant ID and Pull List ID do not match (or data is missing) between DHCD's Housing Applications Vacancy System and CHAMP for units occupied during the fiscal year, excluding administrative transfers

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

CRITERION	DESCRIPTION
Health & Safety	
Health & safety violations	DHCD has observed conditions at the LHA's developments and reported health and safety violations. The LHA has certified the number of corrected violations in each category.
Facility Management – Inspection Standards and Practices	
100% Unit Inspections	<p>All units inspected at LHA during FY under review</p> <ul style="list-style-type: none"> • No Findings: 100% of units inspected <p>Corrective Action: Less than 100% of units inspected</p>
LHA Inspections Reports/Work Orders	<p>Unit inspection reports create, track, and report work orders for inspection repairs, and inspection WOs completed within 30 days or add to DM/CIP</p> <ul style="list-style-type: none"> • No Findings: All inspection work orders/lease violations are created, tracked, and reported; And non-health and safety work orders for inspection repairs/lease violations are completed within 30 days or added to DM/CIP; And health and safety work orders for inspection repairs/lease violations are addressed within 48 hours • Operational Guidance: All health and safety inspection work orders/lease violations are created, tracked, reported and completed within 48 hours; And LHA fail to create, track, or report no more than 1 or 2 (based on LHA size) non-EHS (exigent health and safety) deficiencies; Or LHA failed to complete any non-EHS work orders/lease violations appropriately • Corrective Action: Any EHS work orders/lease violations not created, tracked, reported, or completed; Or 1 of the following: LHA failed to create, track or report a) More than 1 non-EHS deficiency (small LHA); b) More than 2 non-EHS deficiencies (Medium/Large)
Accuracy of LHA Inspections	<p>Unit inspection reports accurately reflect necessary repairs</p> <ul style="list-style-type: none"> • No Findings: c.667 unit has less than 2 EHS deficiencies and c.200/705 unit has less than 3 EHS deficiencies • Operational Guidance: c.667 unit has 2 EHS deficiencies or c.200/705 has 3 EHS deficiencies <p>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</p>
Facility Management – Vacancy Turnover Standards and Practices	

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"> • No Findings: Vacancy work orders are created, tracked and reported for every unit and reflect all work in unit; And Vacancy work orders are Maintenance Ready in <=30 days for c.667 units or <=45 days for c.200/705 units or have approved waiver • Operational Guidance: Vacancy work orders are created, tracked and reported for every unit; And work orders do not reflect all work completed in unit; Or vacancy work orders are Maintenance Ready in 31-45 days for c.667 and 46-60 days for c.200/705 and no approved waiver <p>Corrective Action: Vacancy work orders are not created, tracked and reported for every unit; Or vacancy work orders are Maintenance Ready in >45 days for c.667 and >60 days for c.200/705 and have no approved waiver</p>
Accuracy and Standard of Vacancy Turnovers	<p>Vacancy turnover work orders accurately reflect necessary repairs</p> <ul style="list-style-type: none"> • No Findings: c.667 unit less than 2 EHS deficiencies and c.200/705 less than 3 EHS deficiencies • Operational Guidance: c.667 2 EHS deficiencies or c.200/705 3 EHS deficiencies <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>
Facility Management – Preventative Maintenance Standards and Practices	
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"> • No Findings: c.667 unit less than 2 EHS deficiencies and c.200/705 less than 3 EHS deficiencies • Operational Guidance: c.667 2 EHS deficiencies or c.200/705 3 EHS deficiencies <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>
Work Order Types and Systems	
Emergency Work Orders	<p>All emergency work orders are created, tracked, reported and completed within 48 hours</p> <ul style="list-style-type: none"> • No Findings: All emergency work orders under review are created, tracked, reported and completed within 48 hours • Operational Guidance: All emergency work orders completed within 48 hours; Less than 100% but greater than or equal to 80% of work orders under review are correctly created, tracked and reported administratively

CRITERION	DESCRIPTION
	<ul style="list-style-type: none"> • Corrective Action: Not all emergency work orders are completed within 48 hours; Or less than 80% of work orders under review are correctly created, tracked and reported administratively
Requested Work Orders	<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"> • No Findings: All requested work orders under review are created, tracked, and reported; All work is complete within 14 days or added to DM/CIP • Operational Guidance: All requested work orders completed within 14 days or added to DM/CIP; And less than 100% of work orders under review are correctly created, tracked and reported <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 Brockton Housing Authority:

Policy	Last Ratified by Board Vote	Notes
*Rent Collection Policy	01/24/2019	
*Personnel Policy	06/24/2021	Reviewed each year
*Capitalization Policy	12/31/2003	
*Procurement Policy	09/24/2020	
*Grievance Policy	01/22/2004	
Smoking Policy	08/01/2018	
Reasonable Accommodations Policy	10/27/2022	
Language Access Plan	09/20/2018	
Fair Housing Marketing Plan	10/27/2022	
Other – Define in the ‘Notes’ column	01/27/2022	Telework Policy

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

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

Waivers

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

Description	Reason	Date Waiver Approved by DHCD	Date Expired
Waiver to leave RCAT	Staff Capacity	05/16/2021	05/15/2024

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.

- RAB letter
- Public Comments and LHA Responses
- Cover sheet for tenant satisfaction surveys

September 27, 2024

To Whom It May Concern,

This letter serves as a certification that the Director of Asset Management met with members of Brockton Housing Authority Resident Advisory Board (RAB) on September 19, 2024. Members were informed of the availability of the draft Annual Plan and encouraged to submit written comments regarding the Brockton Housing Authority 2025 Annual Plan

Sincerely,

A handwritten signature in black ink, appearing to read 'Carol Roberts', with a long horizontal flourish extending to the right.

Carol Roberts
President

Brockton Housing Resident Advisory Board

Brockton

Housing

Authority

Timothy J. Sullivan, Chairman
Ernest Pettiford, Vice Chairman
Carol Roberts, Treasurer
Taylor Harris, Assistant Treasurer
Janet Trask, Member

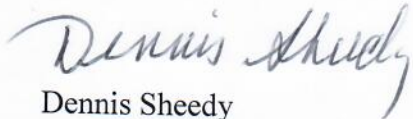
Thomas Thibeault, Executive Director

**Importante! Por favor haga traducir este aviso inmediatamente.
Saa se infomasyon impotan! Fe yon moun tradui li pou wou tout suite.
Importante! Mande traduzir este aviso immediatam**

September 27, 2024

The draft annual plan for the Brockton Housing Authority was made available to the residents on July 31, 2024. The public hearing was held on September 26, 2024 and there were no comments made or submitted. The Brockton Housing Authority Board of Commissioners subsequently approved the Plan at the close of the comment period.

BROCKTON HOUSING AUTHORITY



Dennis Sheedy
Director of Asset Management
Brockton Housing Authority
Abington Housing Authority

Brockton Housing Authority
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P.O. Box 7070
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(508) 588-6880 / Fax (508) 588-8271

#24-09
Regular Meeting of September 26, 2024
Extract

Chairman Timothy Sullivan called the meeting to order at 2:00 PM. Upon a roll call, those present and absent were as follows:

PRESENT

Janet Trask
Taylor Harris
Carol Roberts
Timothy Sullivan

ABSENT

Ernest Pettiford

Mr. Sheedy explained the Approval of 2025 Annual Plan and Five Year Capital Plan. The 2025 State Annual Plan for the Brockton Housing Authority is being presented to the Board for approval. The annual plan is a requirement as part of the Housing Reform Act of 2013. The Plan is compiled of policies, budgets and plans that have been approved by the Board in the past. It provides public insight into the operations of the Authority. The Plan has been posted on the BHA's website and posted at the Authority's state properties. Commissioner Trask made a motion, seconded by Commissioner Harris to approve the Brockton Housing Authority 2025 State Annual Plan and Five Year Capital Plan as presented. Upon a roll call vote, the ayes and nays were as follows:

AYES


Janet Trask
Carol Roberts
Taylor Harris
Timothy Sullivan

NAYS


None

The Chairman thereupon declared the motion carried.

I do hereby attest that the above is a true and correct extract for the minutes of the Regular Meeting of September 26, 2024.



Thomas G. Thibeault, Secretary



Date

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.