# Notice of Public Hearing

## THE BOSTON HOUSING AUTHORITY
## invites all tenants and the general public to a review of the Authority's Proposed Annual Plan for Fiscal Year 2028

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

1. Proposed Capital Improvement Plan
2. Proposed Maintenance and Repair Plan
3. Current Operating Budget
4. Responses to the Performance Management Review (PMR) findings
5. List of housing authority policies
6. List of waivers from governing regulations of the Executive Office of Housing and Livable Communities (EOHLC)
7. Other elements

Hearing time and date: 10:00 AM on 12/14/2026

Hearing location: Boston City Hall
1 City Hall Plaza, Room 801
Boston, Ma 02201

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

- Copies of the Annual Plan are available at the Authority's office or may be reviewed online at https://publichousingfacilityreview.mass.gov/Public?ap=351
- Comments may be submitted orally at the hearing, by emailing the housing authority office, or by submitting written comments at the housing authority office. Comments must be received no later than the close of the public hearing.
- For reasonable accommodation requests contact the housing authority office by 12/7/2026 at 4:00 PM
- Contact information for BOSTON HOUSING AUTHORITY:
  Office: 52 Chauncy Street Boston, MA 02111
  Phone: 617-988-4000
  Email: BHAAdmin@bostonhousing.org

# Detailed Instructions for Remote Access

There will be a second public hearing, on-line, with registration on December 14, 2026 at 6 pm at https://tinyurl.com/bha2027annualplanshearing. After registering, you will receive a confirmation email with information about joining the meeting.

# Aviso de audiencia pública

## EL/LA BOSTON HOUSING AUTHORITY

invita a todos los arrendatarios y al público en general a una revisión del Plan Anual Propuesto por la autoridad para el año fiscal 2028

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

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

| | |
|---|---|
| Fecha y hora de la audiencia: | 10:00 AM on 12/14/2026 |
| Lugar de la audiencia: | Boston City Hall<br>1 City Hall Plaza, Room 801<br>Boston, Ma 02201 |

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

- Puede obtener copias del Plan anual en la oficina de la autoridad o consultar el Plan por Internet en https://publichousingfacilityreview.mass.gov/Public?ap=351. El Plan está disponible únicamente en inglés.
- Si desea hacer comentarios, puede hacerlo oralmente en la audiencia o enviar los comentarios por correo electrónico o postal a la oficina de la autoridad de vivienda. Los comentarios se deben recibir antes del cierre de la audiencia pública.
- Si tiene una solicitud razonable en relación con una discapacidad, póngase en contacto con la oficina de la autoridad de vivienda antes del 12/14/2026 a las 10:00 AM.
- Información de contacto de BOSTON HOUSING AUTHORITY:

  Oficina: 52 Chauncy Street Boston, MA 02111

  Teléfono: 617-988-4000

  Correo electrónico: BHAAdmin@bostonhousing.org

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# <u>សេចក្តីជូនដំណឹងអំពីសវនការសាធារណៈ:</u>

# BOSTON HOUSING AUTHORITY

## អញ្ជើញអ្នកជួល
## និងសាធារណជនទូទៅទាំងអស់ឲ្យទៅពិនិត្យមើលឡើងវិញនូវផែនការប្រចាំឆ្នាំដែលបានដាក់ស្នើ
## របស់អាជ្ញាធរសម្រាប់ឆ្នាំសារពើពន្ធ 2028

ផែនការប្រចាំឆ្នាំមានគោលបំណងផ្តល់ការយល់ដឹងអំពីប្រតិបត្តិការ
និងផែនការរបស់អាជ្ញាធរសម្រាប់ឆ្នាំសារពើពន្ធខាងមុខនេះ
ព្រោះវាប៉ះពាល់ដល់លំនៅដ្ឋានសាធារណៈដែលជួយដោយរដ្ឋរបស់អាជ្ញាធរ។ ផែនការប្រចាំឆ្នាំដែលបានដាក់ស្នើ
មានធាតុដូចខាងក្រោម៖

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

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| កាលបរិច្ឆេទ និងម៉ោងសវនការ៖ | 10:00 AM នៅ 12/14/2026 |
| ទីកន្លែងសវនការ៖ | Boston City Hall<br>1 City Hall Plaza, Room 801<br>Boston, Ma 02201 |

គេហជន និងសាធារណជនទូទៅត្រូវបានអញ្ជើញឱ្យពិនិត្យមើលឡើងវិញនូវផែនការប្រចាំឆ្នាំមុនពេលបើកសវនាការ
ហើយអាចបញ្ចូនមតិសាធារណៈដូចបានកត់សម្គាល់ខាងក្រោម។
អាជ្ញាធរត្រូវគិតគូរពីកង្វល់នានារបស់អង្គការរបស់អ្នកជួលក្នុងមូលដ្ឋាន (LTO) ឬក្រុមប្រឹក្សាយោបល់គេហជន (RAB)
អំពីតម្រូវការ និងអាទិភាពនានា ហើយបញ្ចូលតម្រូវការ និងអាទិភាពទាំងនោះមួយចំនួន
ឬទាំងអស់ទៅក្នុងសេចក្តីព្រាងផែនការ បើអាជ្ញាធរយល់ថាសមស្របជាមួយការគ្រប់គ្រងដែលត្រឹមត្រូវ។ មតិសំខាន់ៗ
នឹងត្រូវបានសង្ខេប និងបញ្ចូលទៅក្នុងផែនការប្រចាំឆ្នាំ នៅពេលវាត្រូវបានដាក់ជូនក្រសួងអភិវឌ្ឍសហគមន៍ និងលំនៅដ្ឋាន
(EOHLC)។

- សេចក្តីចម្លងនៃផែនការប្រចាំឆ្នាំ មាននៅការិយាល័យរបស់អាជ្ញាធរ ឬអាចពិនិត្យមើលឡើងវិញលើបណ្តាញតាមរយៈ
  https://publichousingfacilityreview.mass.gov/Public?ap=351។ មានជាភាសាអង់គ្លេសតែប៉ុណ្ណោះ។
- មតិនានាអាចត្រូវបានផ្តល់ដោយផ្ទាល់មាត់នៅក្នុងសវនាការ ដោយផ្ញើអ៊ីមែលទៅការិយាល័យអាជ្ញាធរលំនៅដ្ឋាន
  ឬដោយដាក់មតិជាលាយលក្ខណ៍អក្សរនៅការិយាល័យអាជ្ញាធរលំនៅដ្ឋាន។
  មតិនានាត្រូវតែផ្តល់ឱ្យបានមុនពេលបិទសវនាការសាធារណៈ។
- សម្រាប់សំណើសុំការស្នាក់នៅសមរម្យ សូមទាក់ទងការិយាល័យអាជ្ញាធរលំនៅដ្ឋានត្រឹមថ្ងៃ 12/14/2026 នៅម៉ោង
  10:00 AM។
- ព័ត៌មានទំនាក់ទំនងសម្រាប់ BOSTON HOUSING AUTHORITY៖
  ការិយាល័យ៖ 52 Chauncy Street Boston, MA 02111
  ទូរស័ព្ទ៖ 617-988-4000
  អ៊ីមែល៖ BHAAdmin@bostonhousing.org

# Detailed Instructions for Remote Access

There will be a second public hearing, on-line, with registration on December 14, 2026 at 6 pm at https://tinyurl.com/bha2027annualplanshearing. After registering, you will receive a confirmation email with information about joining the meeting.

# Thông báo Điều trần Công khai

## BOSTON HOUSING AUTHORITY xin mời tất cả những người thuê nhà và cộng đồng đến tham dự buổi đánh giá Kế hoạch Hàng năm Đề xuất cho Năm Tài chính của Cơ quan Quản lý 2028

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

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

Ngày và giờ điều trần: 10:00 AM và 12/14/2026

Địa điểm điều trần: Boston City Hall
1 City Hall Plaza, Room 801
Boston, Ma 02201

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

- Các bản sao của Kế hoạch Hàng năm sẵn có tại văn phòng Cơ quan Quản lý hoặc quý vị có thể xem trực tuyến tại https://publichousingfacilityreview.mass.gov/Public?ap=351. Các bản này chỉ có bằng Tiếng Anh.
- Các ý kiến đóng góp có thể được nộp bằng lời tại buổi điều trần, gửi email cho văn phòng cơ quan quản lý gia cư, hoặc nộp ý kiến bằng văn bản tại văn phòng cơ quan quản lý gia cư. Các ý kiến đóng góp phải được nhận không muộn hơn giờ kết thúc phiên điều trần.
- Để đưa ra các yêu cầu về biện pháp điều chỉnh đặc biệt hợp lý, hãy liên hệ với văn phòng cơ quan quản lý gia cư trước 12/14/2026 lúc 10:00 AM.
- Thông tin liên hệ cho BOSTON HOUSING AUTHORITY:
  Văn phòng: 52 Chauncy Street Boston, MA 02111
  Điện thoại: 617-988-4000
  Email: BHAAdmin@bostonhousing.org

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# 开公众听证会的通知

## BOSTON HOUSING AUTHORITY 邀请所有租户和公众

### 对本管理局的{　}财政年度建议的《年度计划》进行审查

该《年度计划》旨在深入了解本管理局的运作和下一财政年度的计划，因为它们会影响到管理局的有国家援助的公共住房。建议的年度计划包括以下内容：2028

1.建议的资本改善计划

2.建议的维修计划

3.当前的运营预算

4.对绩效管理审查（PMR）调查结果的回应

5.住房管理局政策一览表

6.从住房和社区发展部（EOHLC）的法规可豁免的条例清单

7.其他基本点

听证会时间和日期: 10:00 AM 在 12/14/2026

听证会地点: Boston City Hall
1 City Hall Plaza, Room 801
Boston, Ma 02201

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

- 可以在管理局的办公室获得《年度计划》的副本，或者可以上网进入 https://publichousingfacilityreview.mass.gov/Public?ap=351 在线查看。那些副本或网上内容是用英语的。
- 各位要提出评论，可以在听证会上通过口头方式、或通过向住房管理局的办公室发送电子邮件、或在住房管理局的办公室当面提交书面评论。所有评论必须在公众听证会结束之前收到。
- 对于合理的需通融的要求，请在{时间}之前通过10:00 AM 在 12/14/2026 与住房管理局的办公室联系。
- BOSTON HOUSING AUTHORITY 的联系方式：
  办公室：52 Chauncy Street Boston, MA 02111
  电话：617-988-4000
  电子邮件：BHAAdmin@bostonhousing.org

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# Aviso de Audiência Pública

## O BOSTON HOUSING AUTHORITY
## convida todos os locatários e o público em geral para uma revisão do plano anual proposto pela Autoridade para o ano fiscal 2028

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

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

| | |
|---|---|
| Data e hora da audiência: | 10:00 AM on 12/14/2026 |
| Local da audiência: | Boston City Hall<br>1 City Hall Plaza, Room 801<br>Boston, Ma 02201 |

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

- Cópias do Plano Anual estão disponíveis no escritório da Autoridade ou podem ser analisadas on-line em https://publichousingfacilityreview.mass.gov/Public?ap=351 . Estas estão apenas no idioma inglês.
- Os comentários podem ser apresentados oralmente na audiência, por e-mail para o escritório da autoridade habitacional ou por escrito para o escritório da autoridade habitacional. Os comentários devem ser recebidos, no máximo, até o encerramento da audiência pública.
- Para solicitações razoáveis de acomodação, entre em contato com o escritório da autoridade habitacional em 12/14/2026 às 10:00 AM.
- Informações de contato para BOSTON HOUSING AUTHORITY:
  Escritório: 52 Chauncy Street Boston, MA 02111
  Telefone: 617-988-4000
  E-mail: BHAAdmin@bostonhousing.org

# Detailed Instructions for Remote Access

There will be a second public hearing, on-line, with registration on December 14, 2026 at 6 pm at https://tinyurl.com/bha2027annualplanshearing. After registering, you will receive a confirmation email with information about joining the meeting.

# Уведомление о публичном слушании

## BOSTON HOUSING AUTHORITY
## приглашает всех жильцов и представителей общественности принять участие в рассмотрении предлагаемого Управлением Годового плана на фискальный год 2028

Целью Годового плана является представление сведений о деятельности и планах Управления на предстоящий фискальный год в том, что касается предоставления социального жилья Управлением при поддержке государства. Предлагаемый Годовой план включает следующие разделы:

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

Время слушания: 10:00 AM Дата слушания 12/14/2026

Место проведения слушания:
Boston City Hall
1 City Hall Plaza, Room 801
Boston, Ma 02201

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

- Копии Годового плана можно получить в офисе Управления или на сайте: https://publichousingfacilityreview.mass.gov/Public?ap=351 . Документы доступны только на английском языке.
- Замечания можно сделать устно в ходе слушания, а также отправить их по электронной почте в офис Жилищного управления или оставив их в письменном виде в офисе Управления. Замечания должны быть получены до закрытия публичного слушания.
- Разумные запросы о размещении можно направить в офис Жилищного управления до 12/14/2026 10:00 AM
- Контактная информация BOSTON HOUSING AUTHORITY
  Офис: 52 Chauncy Street Boston, MA 02111
  Телефон: 617-988-4000
  Адрес эл. почты: BHAAdmin@bostonhousing.org

# Detailed Instructions for Remote Access

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# Avi Odisyon Piblik

## BOSTON HOUSING AUTHORITY
## ap envite tout lokatè ak piblik la an jeneral nan yon revizyon Plan Anyèl pou Ane Fiskal la ke Administrasyon an Pwopoze 2028

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

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

Dat ak lè odisyon: 10:00 AM nan dat 12/14/2026

Adrès odisyon an: Boston City Hall
1 City Hall Plaza, Room 801
Boston, Ma 02201

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

- Kopi Plan Anyèl yo disponib nan biwo Administrasyon an oswa w ka revize anliy nan https://publichousingfacilityreview.mass.gov/Public?ap=351. Sa yo se nan lang Anglè sèlman.
- Yo gendwa soumèt kòmantè yo vèbalman nan odisyon an, pa imèl bay biwo administrasyon lojman an, oswa nan soumisyon kòmantè ekri w yo nan biwo administrasyon lojman an. Yo ta dwe voye kòmantè yo nan yon moman ki pa pi ta pase odisyon piblik la.
- Pou demand akomodasyon rezonab kontakte biwo administrasyon lojman an kote w ap 12/14/2026 a 10:00 AM.
- Enfòmasyon kontak pou BOSTON HOUSING AUTHORITY:
  Biwo: 52 Chauncy Street Boston, MA 02111
  Telefòn: 617-988-4000
  Imèl: BHAAdmin@bostonhousing.org

# Detailed Instructions for Remote Access

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# BOSTON HOUSING AUTHORITY
# Proposed Annual Plan for Fiscal Year 2028
# 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 EOHLC.

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 BOSTON HOUSING AUTHORITY's Annual Plan for their 2028 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, which may include:
    a. Approval documents and any Public Comments
    b. Tenant Satisfaction Survey
    c. Performance Management Review report
    d. Other documents added by LHA

## State-Aided Public Housing Developments

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

| Dev No | Type | Development Name | Num Bldgs | Year Built | Dwelling Units |
|---|---|---|---|---|---|
| 705-01 | Family | 23-25 Bowdoin St. / 81 E. Berkley | 2 | 1930 | 13 |
| 705-03 | Family | 36 - 42 Harwood Street and 33 Winston Rd | 5 | 1992 | 10 |
| 200-07 | Family | ARCHDALE | 6 | 1950 | 285 |
| 200-05 | Family | FAIRMOUNT | 37 | 1951 | 202 |
| 200-04 | Family | FANEUIL | 10 | 1950 | 258 |
| 667-01 | Elderly | FRANKLIN FIELD 667-1 | 7 | 1963 | 40 |
| 667-02 | Elderly | FRANKLIN FIELD 667-2 | 7 | 1963 | 64 |
| 200-10 | Family | GALLIVAN BLVD. | 130 | 1953 | 251 |
| 667-03 | Elderly | MONSIGNOR POWERS | 1 | 1976 | 69 |
| 705-06 | Family | Scattered Sites | 61 | 1988 | 119 |
| 200-12 | Family | SOUTH STREET | 9 | 1953 | 132 |
| 200-01 | Family | WEST BROADWAY | 20 | 1949 | 485 |
| | Elderly | Elderly Elderly units in smaller developments | 1 | | 5 |
| | Other | Other Special Occupancy units | 9 | | 52 |
| Total | | | 305 | | 1985 |

## LHA Central Office

BOSTON HOUSING AUTHORITY
52 Chauncy Street Boston, MA 02111

Kenzie Bok, Executive Director
Phone: 617-988-4000
Email: BHAAdmin@bostonhousing.org

## LHA Board of Commissioners

| Role | Category | From | To |
|---|---|---|---|

## Additional Remarks

Hsg Dev Table edits: Dev No 705-03 has 2 Bldgs; 667-01 type is family; 667-03 has 68 Dwelling Units (DUs); 705-06 has 45 Bldgs and 90 DUs; near bottom Elderly appears 2x, should be 'Elderly units in smaller developments'. BHA has 652 MRVP vouchers. BHA manages Federally-assisted public hsg dev's and/or rental subsidy vouchers serving approximately 25,315 households.

## 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. | 10/29/2026 |
| B. | Advertise the public hearing in public postings. | 10/29/2026 |
| C. | Notify all LTOs or RAB (if there is one) of the hearing and provide access to the Proposed Annual Plan. | 10/29/2026 |
| D. | Post draft AP for tenant and public viewing. | 10/28/2026 |
| E. | Hold quarterly meeting with LTO or RAB to review the draft AP. (Must occur before the LHA Board reviews the Annual Plan.) | 11/19/2026 |
| F. | Annual Plan Hearing. Hosted by the LHA Board, with a quorum of members present. (For Boston, the Administrator will host the hearing.) | 12/14/2026 |
| G. | Executive Director presents the Annual Plan to the Board. | 1/21/2027 |
| H. | Board votes to approve the AP. (For Boston Housing Authority, the Administrator approves and submits the AP.) | 1/28/2027 |

This Annual Plan (AP) will be reviewed by the Executive Office of Housing and Livable Communities (EOHLC) following the public comment period, the public hearing, and LHA approval.

# Capital Improvement Plan (CIP) Description

## What Is the Capital Improvement Plan?

The Capital Improvement Plan (CIP) is a five-year plan that outlines major repairs and improvements to housing authority properties. It describes each project's scope, estimated cost, and timeline, while reflecting the Local Housing Authority's prioritization of its most critical needs, particularly those related to resident health and safety. The plan also identifies how projects may be funded and when they are anticipated to take place, based on the Massachusetts Executive Office of Housing and Livable Communities (EOHLC) fiscal year (July 1 through June 30).

## How Projects Are Funded Each Year

Each year, every Local Housing Authority (LHA) receives a Formula Funding Award from EOHLC. This annual award provides the primary source of funding for new projects included in the CIP. While funding levels may vary, it is generally reasonable to anticipate that similar award amounts will be available over the next two years, which helps inform project planning and scheduling. LHAs may also apply for additional "special awards" from EOHLC for specific projects that meet certain criteria, such as emergency repairs, regulatory compliance, or energy and water conservation improvements.

## Why Plans and Costs May Change

The CIP is a planning document and must be submitted to EOHLC for review and approval. While the plan reflects current cost estimates, project budgets often increase between the time they are planned and when construction begins. As a result, available funding may not go as far as originally anticipated, and some projects may need to be adjusted, delayed, or completed in phases.

## Why Project Schedules Can Shift

Because the CIP is updated each year, project schedules and priorities may change over time. In particular, previously unidentified conditions or urgent repair needs may arise after the plan is developed; due to their impact on health, safety, or building integrity, these issues may take precedence over projects that were previously scheduled. When this occurs, the plan may be updated through CIP Revision.

To better understand how a plan has changed—including which projects were advanced, delayed, or added—it is helpful to compare the current year's CIP with the prior year's CIP. This comparison can show how EOHLC funding decisions and plan revisions have affected project timing and priorities.

## Other Funding Sources

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. However, not all of these funding sources are available every year, or in all communities.

The CIP includes the following parts:

1. A list of existing projects approved in last year's CIP Plan or added to the plan through CIP Revision during the year.
2. A list of planned capital projects showing spending per fiscal year.
3. 'Narrative Questions' with a variety of additional information.

# Active and Proposed Projects with Projected Spending by Fiscal Year

| Active Projects | | | |
|---|---|---|---|
| **Project #** | **Project Title** | **Development** | **Total Development Cost** |
| 035498 | ARPA FF: Site Utilities Drainage | FAIRMOUNT | $202,115.00 |
| 035499 | ARPA FF: ECM Control Replacement | ARCHDALE | $818,288.33 |
| 035527 | AIP: 667 Routine Turnovers | | $0.00 |
| 035536 | BHA Project # 2421 01_02 Mod at Fairmount | | $95,000.00 |
| 035537 | "BHA Project # 1854-13_02 Building Envelope " | Scattered Sites | $335,757.83 |
| 035538 | "BHA Project # 1854-14_02 Windows and Doors " | Scattered Sites | $120,118.72 |
| 035539 | "BHA Project # 1854-18_02 Basement Insulation " | Scattered Sites | $29,820.95 |
| 035540 | "BHA Project # 1854-16_02 ERV and Controls " | Scattered Sites | $74,692.90 |
| 035541 | "BHA Project # 1854-17_02 Heat Pump and Domestic Hot Water " | Scattered Sites | $218,884.16 |
| 035542 | BHA Project # 2495-02 Creative Place-Making Award | ARCHDALE | $504,000.00 |
| 035365 | FF: building envelope - 49 Tremont St. Charlestown | 49 Tremont Street - Charlestown | $352,144.17 |
| 035411 | Auth-Wide: Stair Hall Improvements (Phase I) BHA#1259-01 | WEST BROADWAY | $0.00 |
| 035424 | FF: SUST-CSI 2019: Building Envelope and Mechanicals - Msgr Powers Phase I | MONSIGNOR POWERS | $6,966,063.54 |
| 035427 | FF: Authority Wide New Building Envelope BHA 1562-01 | Scattered Sites | $0.00 |
| 035429 | BHA#2419-01_02 Roofing at Archdale (Bldgs 1 & 2) | WEST BROADWAY | $1,082,410.00 |
| 035454 | Authority Wide Comprehensive Site Survey | GALLIVAN BLVD. | $60,000.00 |
| 035470 | SUST-CSI 2019: Msgr Powers Phase II - HVAC, and associated work | MONSIGNOR POWERS | $10,645,144.98 |
| 035480 | Site beautification (Private grant) | | $695,620.00 |
| 035486 | ARPA Targeted: Boston Fire Alarm Upgrade -BHA Project #2065-02 | 19 Winston Road (DMH) | $3,590,152.98 |
| 035487 | ARPA Targeted: Boston Fed Pac Panel Upgrade -BHA Project #2067-02 | ARCHDALE | $986,197.21 |
| 035503 | BHA Project #2094-01_02 UST Stablization(2) 15,000 Tanks / AST Installation | FANEUIL | $661,967.42 |

| Active Projects | | | |
|---|---|---|---|
| 035505 | BHA Project #1947-02 - Envelope Improvement TA Only - No FF | SOUTH STREET | $412,204.53 |
| 035508 | "BHA Project #2092-01_Investigative Site Development Study - Tremont | Torrey Street | $156,062.21 |
| 035509 | BHA Project #2093-01_Investigative Site Development Study - Wentworth & Torrey | 1492 Tremont Street - Dorchester | $104,115.49 |
| 035510 | BHA Project # 2068-02 Envelope | Scattered Sites | $0.00 |
| 035513 | BHA Project # 2097-02_ Wire Access Points at 4 State Sites - Phase I | GALLIVAN BLVD. | $273,040.00 |
| 035515 | BHA Project #2172-02 BWSC Emergency Underground Water Main Repairs | GALLIVAN BLVD. | $2,100.00 |
| 035517 | BHA Project #2171-01 Drone Aerial Imaging | SOUTH STREET | $4,465.00 |
| 035519 | BHA 2222-02 Stove Replacement with Induction Stoves | FRANKLIN FIELD 667-2 | $427,912.13 |
| 035521 | DMH Tree Trimming - Authority Wide | 19 Winston Road (DMH) | $52,099.00 |
| 035522 | 2193-01 Ramp Replacement | Scattered Sites | $235,000.00 |
| 035523 | BHA Project # 2285-01 Resiliency Feasibility Study at West Broadway | WEST BROADWAY | $40,000.00 |
| 035524 | BHA Project # 2282-01\|02 25A Energy Pilot | FRANKLIN FIELD 667-1 | $0.00 |
| 035525 | BHA Project No. 2321-01_02 Archdale Parkland Playground - No Capital Funds | ARCHDALE | $1,072,984.70 |
| 035526 | BHA Project # 2338-01\|02 SUST Gas Stove Electrification -Archdale | ARCHDALE | $2,451,408.73 |
| 035528 | 2050-11 Transformer Replacement Phase II | WEST BROADWAY | $732,629.44 |
| 035529 | 2099-11 Load Center Upgrades | GALLIVAN BLVD. | $1,608,980.00 |
| 035530 | 2051-11 Vault Transformer Replacement | SOUTH STREET | $1,588,007.68 |
| 035531 | 2087-11 Standby Emergency Generator System | MONSIGNOR POWERS | $449,379.37 |
| 035532 | 1854-11 Building Envelope Restoration at 21 Maryland Street | Scattered Sites | $1,379,902.82 |
| 035533 | Building \| Site Utility Upgrades | FRANKLIN FIELD 667-1 | $3,419,832.01 |
| 035534 | BHA Prj #2342-01\|02 Site Beautification Phase II (Private grant - no FF) | FRANKLIN FIELD 667-1 | $651,710.00 |
| Total | | | $42,500,211.30 |

| **Proposed Projects** | | | |
|---|---|---|---|
| **FY2027** | | **Available Formula Funding:** | **$3,702,454.46** |
| **Project Title** | **Development** | **Total Development Cost** | **Special Award(s) Requested** |
| Interior Stair Repairs | SOUTH STREET | $1,756,712.00 | |
| As Needed Authority-wide Building Envelope Repairs - Phase II | FRANKLIN FIELD 667-1 | $644,188.00 | |
| BHA Project # 2198 01_02 Common Area Lighting Upgrades | FRANKLIN FIELD 667-1 | $72,450.00 | |
| BHA Project #0000-01 Elevator Modernization | MONSIGNOR POWERS | $479,658.00 | |
| BHA Project # 2511-02 Comprehensive Heating Plant Upgrades | FRANKLIN FIELD 667-1 | $522,750.00 | $522,750.00 |
| Total | | $3,475,758.00 | $522,750.00 |

| **Proposed Projects** | | |
|---|---|---|
| **FY2028** | **Anticipated Formula Funding:** | **$3,702,454.46** |
| **Project Title** | **Development** | **Total Development Cost** |
| Unit Modernization - Kitchens and Bath - Scattered Sites | 49 Tremont Street - Charlestown | $907,500.00 |
| Kitchen / Bath Modernization 2010 - OCC | ARCHDALE | $2,248,722.00 |
| As Needed Authority-wide Building Envelope Repairs - Phase II | ARCHDALE | $225,000.00 |
| Authority Wide Stair Hall Improvements - Phase II | ARCHDALE | $225,000.00 |
| Total | | $3,606,222.00 |

| **Proposed Projects** | | |
|---|---|---|
| **FY2029** | **Anticipated Formula Funding:** | **$3,702,454.46** |
| **Project Title** | **Development** | **Total Development Cost** |
| BHA Project # 2195 01_02 Kitchen. Bathrooms Upgrades and Ventilation | GALLIVAN BLVD. | $2,104,672.00 |
| BHA Project # 2096 01_02 Building Envelope Masonry Repairs and Windows | GALLIVAN BLVD. | $1,578,504.00 |
| Total | | $3,683,176.00 |

| Years 4 (reflect estimated annual planning amounts) | | |
|---|---|---|
| **FY2030** | | |
| **Project Title** | **Development** | **Total Development Cost** |
| Building Envelope - Brick Exterior Wall | SOUTH STREET | $3,650,328.00 |
| Total | | $3,650,328.00 |

| Years 5 (reflect estimated annual planning amounts) | | |
|---|---|---|
| **FY2031** | | |
| **Project Title** | **Development** | **Total Development Cost** |
| Kitchen / Bath Modernization - OCC | SOUTH STREET | $1,695,776.00 |
| Total | | $1,695,776.00 |

## The 'Narrative Questions' with Additional Information

## 1. Project Closeout

Have you reviewed in progress projects, contacted your PM to close out old projects, and recirculated unused funds? Please explain why or why not.

Answer: Yes

Explanation: Yes. We reviewed in-progress projects, coordinated with our Project Manager to close out old projects, and recirculated unused funds to support other capital needs. These actions keep project records current and ensure available funding is directed toward priority improvements.

## 2. Request for Additional Funding

Request additional funding from EOHLC by going to the project's detail page and adding a comment that includes the funding type and requested amount. Upload any relevant attachments at the bottom of this form. Do not include requests already approved in your latest CIP.

## 3. Overall Goals of the Capital Improvement Plan

What do you plan to achieve with this year's CIP plan and how do the projects you've selected support this goal?

Explanation: BHA's CIP is to support and advance housing that fosters resilient and thriving communities, offering a comprehensive array of affordable housing options and opportunities for all residents. Our mission is to promote equity, focusing particularly on households with the lowest incomes, underserved protected classes, and individuals with special needs, while providing housing and supportive services to all members of BHA's diverse and inclusive communities. The key objective is to maintain and expand the supply of truly affordable housing units within the State Portfolio, to provide homes for low- and moderate-income households of Boston. Projects that preserve and enhance residents' quality of life will be prioritized.

## 4. Changes from the Previous CIP

Aside from completing projects that were listed in your previous CIP and adding new projects in the new planning year(s), in what way does your new CIP differ from your previous CIP?

Explanation: There are no significant changes from the previous year's Capital Improvement Plan (CIP) aside from adding new projects through CIP revisions on a rolling basis.

- Rolling Revisions: New projects are incorporated continuously via scheduled CIP updates rather than major structural overhauls between planning cycles.
- The Boston Housing Authority (BHA) has found that the Executive Office of Housing and Livable Communities (EOHLC) data system templates in some instances lack reporting clarity, leading BHA to begin maintaining its own internal planning versions.

## 5. Requirements from previous CIP approval

A. Approval Requirements

Did your previous CIP Approval Letter include conditions to be satisfied when implementing the CIP projects or conditions to be included in your new CIP?

Answer: Yes

Approval Requirements: BHA met all conditions of its previous CIP Approval by restarting projects affected by the designer’s retirement, assigning new project numbers, completing design-service procurement and planning adjustments, and incorporating the projects into the current CIP. All approval requirements have been fulfilled, though construction is still underway.

B. Completed Requirements

Have you completely satisfied the conditions of your previous CIP Approval? Please explain why or why not.

Answer: Yes

Explanation: N/A

## 6. Project Priorities

Does your CIP only include high priority capital projects (Priority 1 and 2 projects)? If no, explain your rationale for including lower priority projects.

Answer: Yes

## 7. High Priority Deficiencies

Are there any high priority capital deficiencies (priority 1 or 2 projects) in your CPS Backlog that you could not fit in your year 1 or 2 CIP plan? If yes, provide an explanation and the plan to address the deficiencies. Make sure to go through the CPS Backlog and update priorities when necessary.

Answer: Yes

Explanation: The primary limitation preventing the integration of these immediate critical needs into the near-term planning horizon is a severe mismatch between annual funding awards and the massive capital required to address our extensive backlog. The BHA faces an extensive backlog of 111 distinct high-priority capital deficiency projects. The formula funding allocations and specialized state grants received annually are completely outpaced by the multi-million dollar scope needed to modernize aging building systems, repair structural envelopes, and overhaul utility infrastructure across the portfolio.

To systematically rehabilitate the portfolio and trim down this backlog despite rigid funding parameters, the BHA relies on a structured plan driven by a strict series of operational determinations:

- Strategic De-escalation (Pare Down): The BHA is reviewing the CPS Backlog to aggressively target and re-prioritize items. Projects are continually evaluated to determine if immediate emergency stabilization or localized maintenance can safely defer a full-scale capital replacement, dynamically adjusting priorities where necessary.
- Aggregated Phase Packaging: Rather than attempting to fund 111 isolated projects simultaneously, the BHA is grouping high-priority deficiencies into comprehensive, site-specific modernization packages. This allows the authority to maximize purchasing power, attract larger contractors, and utilize economies of scale.
- Leveraging Specialized and External Funding: The BHA is aggressively pursuing outside funding injections to supplement baseline Formula Funding. This includes applying for High Leverage Asset Preservation Program (HILAPP) awards, Climate Resilience grants, Community Preservation Act (CPA) funds, and federal modernization subsidies to systematically absorb and clear the highest-risk Priority 1 and 2 deficiencies over a rolling multi-year timeline.

## 8. Accessibility

Are you aware of any accessibility deficiencies in your portfolio (units, common areas, and sites)? If yes, describe the deficiencies and list the projects in this CIP that will address them.

Answer: Yes

Explanation: BHA recognized that none of its legacy units meet modern accessibility standards and adopted a proactive modernization and new-construction plan aligned with current architectural standards. Meeting or Exceeding the 5% Requirement: Fair Housing guidelines and Section 504 mandates require at least 5% of public housing units to be fully accessible to individuals with mobility impairments. BHA aims to meet or exceed this baseline through comprehensive modernization and new construction that expands its supply of compliant, wheelchair-accessible units.

- Common Space Improvements: The capital initiative upgrades non-compliant spaces throughout BHA's portfolio—including shared spaces, community rooms, entry thresholds, walkways, and administrative offices—to ensure barrier-free access.
- State Funding Set-Aside: BHA prioritizes accessibility improvements through the state-mandated 10% ADA Set-Aside allocation from its Formula Funding (FF) pool, reserved exclusively for reasonable accommodation retrofits, path-of-travel improvements, and common-area alterations.

Fairmount Apartments Modernization Grant: BHA has incorporated the Fairmount Modernization Project in Hyde Park with a $10 million High Leverage Asset Preservation Program (HILAPP) grant from EOHLC. The grant anchors a $16 million funding package that also includes $5 million in City of Boston capital funding and $1 million from the federal Community Project Fund.

- Targeted Fairmount Upgrades: The first phase of this HILAPP-funded initiative advances BHA's core accessibility and sustainability goals:

- Unit Modernization: Renovating existing apartment interiors and adapting units so that 5% of the development is fully accessible to individuals with mobility impairments.

Faneuil Gardens Redevelopment: Separate from the Fairmount HILAPP initiative, BHA continues to replace Faneuil Gardens' 1940s buildings in phases, rebuilding them to achieve 100% compliance with current accessibility standards.

## 9. Special Needs Development

A. DMH/DDS Developments

LHAs must meet with each service provider on an annual basis to discuss the physical condition and necessary repairs of each of the DDS/DMH developments (167 or 689). Does your LHA have one or more DDS/DMH developments? If yes, provide details from the service provider input.

Answer: Yes

B. DMH/DDS Projects

Does your plan include projects for the DMH/DDS developments recommended by this service provider? If no, provide an explanation. Include input from the service provider staff for expanding the DMH/DDS set aside.

Service Provider Input Completion Date: 07/16/2026

Answer: No

Explanation: Yes. BHA's CIP addresses service provider recommendations for DMH/DDS developments, including wider shower stalls that accommodate full wheelchair entry and caregiver assistance. BHA has completed a bathroom-to-shower conversion at Zero Cliffmont Street. Additional work includes rebuilding decks and ramps at 1049 Tremont Street and planning comprehensive modernization of 1049 Tremont and Torey Street. These plans would upgrade DDS housing and introduce a broader housing mix to strengthen community connections and reduce social isolation. Service provider staff input will guide these improvements and the proposed expansion of the DMH/DDS set-aside.

## 10. Sustainability Program

Are you requesting Sustainability Funding for any of your projects?

Answer: Yes

If yes, have you engaged with the Mass Save Low Income (LEAN) Program? If no, please explain why not?

Answer: Yes

## 11. Solar Initiatives

Does your current CIP contain roof replacement projects?

Answer: Yes

If yes, does this project include installing solar panels on the new roofs? If no, please explain why not.

Answer: Yes

## 12. Resilience

Are any of your developments flagged for weather vulnerabilities in CPS? For example, sea-level rise/storm surge, rainfall flooding, and extreme heat.

Answer: Yes

If yes, do the projects in this CIP planned at these developments incorporate resilient design elements into the initial design plans and costs? If no, please explain.

Answer: Yes

## 13. Fossil Fuels

PHN 2024-11 stipulates that EOHLC Capital Funds cannot be used to install new fossil fuel-fired equipment, barring a few exceptions. This includes natural gas, propane, and heating oil.

Will fossil fuel-fired equipment be installed as a part of any project in this CIP?

Answer: Yes

If yes, can these project(s) electrify the fossil fuel equipment instead? LEAN or EOHLC Sustainability funds may be able to help. If no, please explain why this project deserves an exception from EOHLC Policy

Answer: No

Explanation: In addition to the explanation provided under Item 2, Request for Additional Funding BHA identified two barriers to near-term heat pump adoption in these five buildings:

- Window modifications: Most windows meet Gradient's width (26"+) and depth (6.25–20") requirements. Living room and bedroom windows measure 32" wide and 8.5" thick, but uneven bases require modification before installation, likely by BHA Force Account Labor or external vendors.
- Electrical capacity: No building has sufficient capacity for window heat pumps or ductless mini-splits. Each has 600-amp, 120/240V service. GGD's September 2025 study found State Family peak demand at 110% of rated capacity; remaining State Elderly capacity was allocated to 14 induction stoves in buildings #4, 6, and 7.

## 14. Vacant Units

Please list the projects in this CIP submission that are tied to reoccupying vacant units. If there are none, write none.

Explanation: BHA#2419-01_02 Roofing at Archdale (Bldgs 1 & 2)

Scheduled FY26

ARPA FF + FF: BHA Project #2091-02 Urgent Roofing Repairs at South Street

Completed 09/26

## 15. EOHLC/RCAT Assistance

Has EOHLC or RCAT staff provided you with assistance developing this CIP? If yes, who were the EOHLC or RCAT staff involved?

Answer: Yes

Explanation: CyberSense / Beth Thompson

## 16. Certification Statement

I certify that this is the complete and accurate list of projects that I will be submitting to the Board for approval as part of the Annual Plan process.

If there are any additions, deletions, or modifications to this list of projects resulting from the Board or LTO/public meeting, I will promptly notify my EOHLC Project Manager and RCAT Project Manager and make the necessary changes.

Answer: Yes

## 17. Other Comments

Comments:

# 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 Executive Office of Housing and Livable Communities (EOHLC).

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

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

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

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

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

## Emergency Request System

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

| METHOD | CONTACT INFO. | TIMES |
|---|---|---|
| Call Answering Service | 617-988-HELP (4357) | 24 Hr. Backup for main Work Order line |
| Call LHA at Phone Number | 617-988-HELP (4357) | 24 Hr. Work Order Center |
| Other | Management/Maint Office | 9am to 5pm Monday through Friday. |

See attached **Preventative Maintenance Plan** for more details.

**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 BOSTON 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 |
| Any other life-threatening condition not listed above. |

## Normal Maintenance Request Process

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

| METHOD | CONTACT INFO. | TIMES |
|---|---|---|
| Text Phone Number | | |
| Call Answering Service | 617-988-HELP (4357) | 24 Hr. backup for Work Order line |
| Call Housing Authority Office | Individual site Management Office | 8am to 5pm Monday through Friday |
| Submit Online at Website | BHA website link for customer service requests | Available 24 hours and staffed 8am to 5pm M-F |
| Email to Following Email | support@bostonhousinghelp.zendesk.com | Available 24 hours and staffed 8am to 5pm M-F |
| Other | 617-988-HELP (4357) | 24 Hr. Work Order center |

## Work Order Management

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

B. We do not track deferred maintenance tasks in our work order system.

C. Our work order process includes the following steps:

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

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

## Maintenance Plan Narrative

Following are BOSTON HOUSING AUTHORITY's answers to questions posed by EOHLC.

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

After successful implementation and refinement of new, streamlined procedures over last few fiscal years for work order management and vacancy turnover, BHA is seeing improved performance and has received positive feedback from staff, residents and EOHLC. The current average completion time for work orders completed from March through September, is 10 days.

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

BHA made several improvements to the maintenance operation over the past few years, successfully transitioning from a paper-driven work order system to fully digitized work orders, making the assignment, tracking and completion of work orders more efficient. BHA continues to utilize communications software to notify residents of outages and service interruptions and provide updates when the issues are resolved. The increased efficiencies created have resulted in improved performance and an average work order completion time of 10-days.

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

To continue to build on successful efforts geared toward increasing efficiency of maintenance delivery, improving customer service, and maximizing the capabilities of the work order software and other technological resources to better communicate with resident customers, and to continue to improve the quality of the completed work and provide staff with more and better tools to succeed. This will include the implementation of auto-generation of cyclical work items like custodial tasks and seasonal preventive maintenance, further reducing the need for data entry, which will allow for more staff time to be spent on quality control and customer service.

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 | $0.00 | $0.00 |
| Last Fiscal Year Actual Spending | $0.00 | $0.00 |

| | | |
|---|---|---|
| Current Fiscal Year Budget | $0.00 | $0.00 |

E. Unit Turnover Summary

| | |
|---|---|
| # Turnovers Last Fiscal Year | 95 |
| Average time from date vacated to make unit "Maintenance Ready" | 7 days |
| Average time from date vacated to lease up of unit | 99 days |

F. Anything else to say regarding the Maintenance Plan Narrative?

## Attachments

These items have been prepared by the BOSTON 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.

BOSTON HOUSING AUTHORITY

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# Boston Housing Authority Preventive Maintenance Plan and Schedule

Work to update this manual is active and ongoing.

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# PREVENTIVE MAINTENANCE


Chapter 1: Introduction
Chapter 2: Development Systems Inventory, Work Stations, Schedules and Service Records
Chapter 3: General Standards for maintenance of mechanical spaces
Chapter 4: Electrical systems and Exterior/common area lighting
Chapter 5: Elevators
Chapter 6: Fire Safety Systems
Chapter 7 Generators
Chapter 8: Heating Systems
Chapter 9: Plumbing Systems
Chapter 10: Ventilation and Air Conditioning
Chapter 11: Roofs
Chapter 12: Small Equipment and Skid Steer Loaders
Chapter 13: Vehicles/Trucks
Chapter 14: Trash Chutes and Compactors
Chapter 15: Regular Custodial Preventive Maintenance


# Chapter 1 Introduction to Preventive Maintenance

This part of the SOP manual contains the policies and procedures for preventive maintenance for the Boston Housing Authority's Family and Elderly Developments. Each of the sections provide information on the exact procedures, record keeping, activity cycles, and lines of responsibility for each building system or component covered by this policy.

The preventive maintenance program serves multiple purposes such as reducing repairs, repair costs, and loss of service to residents. The program prolongs the life of buildings, systems and structures. When preventive maintenance activities are performed correctly, we improve customer service and eliminate major breakdowns that create inconvenience to residents. Performance of preventive maintenance tasks is completed by site staff, central staff and contractors, depending upon the system or task.

## 1.1 Defining the Terms

Preventive maintenance is the term used to describe maintenance activities which, when performed consistently and correctly, help to prevent breakdowns and extend the life of building features, equipment and systems. These activities can be categorized in a hierarchy as follows:

**Inspection – Testing – Cleaning – Serving – Repair – Replacement**

### 1.1.1 Inspection

Inspection is an integral part of any preventive maintenance program. Inspection includes casual observation in the course of the day by BHA staff and residents through which deficiencies can be reported and corrected as well as formal inspections on a regular basis of all building components and systems. Most of the inspections called for in this manual will be performed by BHA staff (Managers, Laborers, Groundskeepers, Resident Custodians and Superintendents); others will be performed by trained technical staff such as electricians, fire extinguisher contractors, and others. Inspections pick up problems on a regular basis and report them for correction before they become larger problems.

### 1.1.2 Testing

In general, testing is performed as a method to determine whether or not an item is working correctly. The most significant testing is performed by the fire alarm contractor who tests every "device" (smoke detectors, pull stations, sprinkler heads, etc.) every year. Other testing includes checking the generator weekly to make sure it runs, testing boilers prior to the start of the heating system, and so forth

### 1.1.3 Cleaning

While cleaning may not be considered a part of preventive maintenance, it is critical to the operation of many systems. It includes regular cleaning of elevator tracks to prevent the build up of debris, regular cleaning of carpets to prevent deterioration from dirt particles, regular cleaning, stripping and waxing of VCT flooring to lengthen the life of such surfaces, and regular wipe downs of all equipment after every use. It also includes cleaning of boiler fire chambers, cleaning of oil supply nozzles, and other more technical cleaning tasks which may require special training.

### 1.1.4 Service

Service includes such work as lubrication, changing filters, changing belts, changing oil, etc. on equipment. Small equipment such as lawnmowers and snow throwers should be serviced at least annually. Generators should be serviced quarterly. Heating systems must be serviced at various levels as frequently as daily; other service can be performed weekly, monthly, quarterly or annually. Tasks involved in service are very specific ("lubricate burner motor," "adjust hoses and belts," " replace oil lube filter"). These specific tasks are detailed on each of the service checklist forms, which will be found for various equipment and systems in this manual. All service requires some training; most service must be done by appropriate trained personnel on the BHA staff or by contractors.

### 1.1.5 Repair

Repairs are made either as the result of an inspection, testing or service activity which identified a repair need, or when an item suddenly becomes dysfunctional. In general, preventive maintenance activities are performed both to prevent the need for repair and to identify repairs needed before they reach the point that they cause a complete malfunction. Some repairs are actually replacements but are usually considered a repair if the item being replaced is a minor component of the system. For instance, a belt might break and cause a malfunction; you will replace the belt, and this is considered a repair to the overall equipment.

### 1.1.6 Replacement

Replacement of an entire system or component should only occur when the system has met or exceeded its useful life. A roof, for instance, should last between 20 and 30 years. While you might need to make repairs to the roof after 10 or 15 years, a properly cared for roof should not need to be replaced until the 20 or 25 year point. The same applies to a variety of building systems. Very frequently, well cared for building systems can last well beyond their anticipated useful life.

## 1.2 Defining the Expectations

The Manager of each development is responsible for insuring that all preventive maintenance activities are carried out on schedule and properly recorded. Most of the work of supervising preventive maintenance in Family Developments is delegated by the manager to the Maintenance Superintendent. In addition, the BHA's service programs coordinator handles preventive maintenance on a variety of highly technical systems, such as elevators and fire alarms, and the heating systems coordinator supervises much of the work required on large heating systems. The following lists more specifically these responsibilities:

### 1.2.1 Development Management and Maintenance Staff

(Includes tasks performed by managers, maintenance superintendents, laborers, groundskeepers as well as work performed by contractors under the supervision and direction of the manager)

- Boiler room Inspections
- Annual replacement of Whalen Unit filters
- Daily/Weekly walk through inspections
- Quarterly Building and Grounds Inspections
- Monthly test of emergency lighting systems
- Weekly inspection of generator
- Annual testing and servicing of fire extinguishers
- Annual replacement of batteries in battery operated smoke detectors
- Annual or more frequent preventive clearing of main drain systems
- Annual steam cleaning of trash chutes
- Annual replacement and/or cleaning of window A/C filters
- Weekly/Quarterly inspection of roof and roof fans
- Annual clearing of main vertical and horizontal drains
- Regular cleaning of gutters and down spouts
- Regular care of trash compactors
- Annual service of small engine equipment (i.e. lawn mowers and snow blowers)
- Regular cleaning of elevators and tracks

### 1.2.2 Heating Plant Staff

- Weekly inspection and service of boiler Rooms
- Annual cleaning and state inspections of boilers
- Regular service on burners and other boiler components

### 1.2.3 Service Program Coordinator

- Monthly elevator service
- Annual elevator inspections
- Quarterly testing of fire alarm systems
- Annual testing of back flow preventers
- Quarterly & annual service to generators
- Steel Skid Loader Service Three Times per Year
- Annual testing of sprinklers & fire pumps
- Management of Roofing Repair Crew
- Quarterly inspections of all BHA Fleet Vehicles
- Annual Dumpster surveys

### 1.2.4 Construction and Repair Division

Replacement of major building systems and equipment

## 1.3 Tracking and Reporting

Critical to the completion of preventive maintenance work is maintaining accurate and complete records of all work completed.

### 1.3.1 Record Keeping

Establish an **Annual Service Record Book, usually a loose-leaf binder.** Managers will establish a service record binder for each fiscal year. In the event that the material is too voluminous to be contained in one book, managers may decide to keep certain materials - such as weekly reports (B&G walk-through short-

forms, IPM service records etc) - in separate notebooks or files, noting in the primary notebook where to find this material.

The Service Record Books will contain all records of Preventive Maintenance performed during the year by in-house staff or by contractors. It will also include call-back service slips for items such as elevators and alarm systems. Follow the instructions in each chapter under record keeping to determine what should be in each section. Establish a section for each type of system or structure at the development.

The Service Record Binder will also contain all reports of flush out extermination.

All materials required should be filed in this book as they occur. All records must be complete no later than **April 10** of each year.

The **Work Order System** at each development will be used to maintain records of all work performed by in-house staff on the systems referred to in this manual as well as all other repair work occurring at the development. All preventive maintenance (P) work orders shall filed in the Annual Service Record binder as well as in the work order system files.

The **purchase order filing system** shall include copies of all purchase orders, etc. and shall act as a back up filing system if necessary for preventive maintenance.

Instructions for filing of specific information is found in the Policies and Procedures sections of each of the building systems addressed in this manual.

### 1.3.2 Annual Schedule of Activities

As a final step in preventive maintenance planning, an annual schedule of activities will be prepared for each development. Throughout this Manual, this form is referred to as the Annual PM Plan – Schedule and Report Form. This schedule will detail out daily, weekly, monthly, quarterly and annual maintenance activities for easy reference and manager planning. The format for this schedule is contained in the SOP Master Building Systems Appendices on the S: FamEld Drive, and is a combined schedule/reporting form. The annual landscape maintenance plan, snow removal plan and annual pest management plan supplement building systems preventive maintenance plans. These plans should be maintained in the Building Systems Inventory Binder and up-dated each year.

### 1.3.3 Reporting

Managers will report on all preventive maintenance activities to their Regional Managers or Assistant Director of Property Management on a monthly basis. This report shall indicate the annual plan of activities and report, on a cumulative basis, what work has actually been accomplished. The report format is available in the SOP Master Building Systems Appendices on the S: FamEld Drive (same as schedule referenced above). Each development shall set up the report at the beginning of the fiscal year, based on the site's systems and schedule of activities, and report out monthly on completion of activities planned.

# Chapter 2 Development Systems Inventory, Work Stations, Schedules and Service Records

## 2.1 Creating A Development Profile and Systems Inventory (Systems Inventory Book)

In order to properly maintain its systems and structures, a development staff needs to know what they have. Thus each development needs a Development Profile and Systems Inventory notebook or binder (referred to as the Systems Inventory Book throughout this manual). This book shall be updated each time there is a change in the system through a capital replacement or repair project, purchase of new equipment or vehicles, or major operations upgrade project.

Each Systems Inventory book shall contain detailed information on all of its structures and systems including sections on the following items, as applicable to each development:

- Site & Floor Plans, including number of buildings and units, types of units
- Annual Preventive Maintenance Plan Schedules and report forms, including Preventive on building systems, pest management, snow removal and landscape care
- Record of Capital Improvements
- Inventory, specification sheets, and service checklist forms for the following systems:
  - Electrical systems
  - Exterior and Interior common area lighting
  - Elevators
  - Fire Safety Systems
  - Generators
  - Heating Systems and all components
  - Plumbing Systems including domestic hot water
  - Roofs
  - Equipment and Vehicles
  - Trash Chutes and Compactors
  - Ventilation and Air Conditioning Systems

Inventory and Specification sheets shall include detailed information on the location, age of the system and components, replacement parts, warranty information etc as applicable and specific scheduled preventive maintenance procedures to be conducted on each system. What is to be included in each section is described in each of the following chapters of this manual. Sample Master System Inventory, Specification and Checklist forms are contained in the SOP Master Building Systems Appendices on the S: FamEld Drive. These forms will need to be customized for the actual systems and components in your Development.

Many Developments may already have a *Profile and System Inventory* notebook created for the systems and components at their sites. This data may need to be reviewed and updated. Technical Staff from the Building Services Department are currently working on revising and updating Authority-wide system inventory and specification information and may be able to provide you with assistance on creating or updating a *Systems Inventory Book* for the systems at your Development.

Our goal is to format a *Development Profile and Building System folder* on the Fam/Eld S:Drive for every Development. These folders will contain inventory, specifications and warranty information etc specific to each building structure, system and component at each Development. This initiative is a *work-in-progress*. The Building Services Department's Technical staff will be working with you on this initiative. As the information is gathered, it will be formatted and saved on the Fam/Eld S:Drive in the folder labeled ***SOP Profile and Bldg. Systems by Development.***

The ***SOP Profile and Bldg. Systems by Development*** folder will be divided into sub-folders that correspond to each Development e.g. Charlestown's sub-folder will be labeled **101- Charlestown Profile and Bldg. Sys.** Each Development sub-folder will be further sub-divided into folders for each Building System/component/structure etc subject to preventive maintenance and organized the same way as the sub-folders in the SOP Master Building Systems Appendices folder.

## 2.2 Creating a PM work station

Each superintendent shall have constructed an appropriate work station for maintaining all checklists and schedules for in-house staff to complete. This work station must consist of a bulletin board on which systems information is maintained, a sample of each type of checklist is maintained, and clip boards containing all of the checklist forms which are regularly used, such as for generators, heating systems and so forth. Items used only annually do not need to be included at the work station. The work station will also include a protected (framed or laminated) copy of the annual PM schedule.

Developments may need to create more than one PM work station depending on the location of various equipment and on who is assigned to maintain it. For instance, it probably makes sense to have the boiler room PM information in the boiler room and all other information in the maintenance office.

## 2.3 Creating an Annual Preventive Maintenance Plan

As a final step in preventive maintenance planning, an annual calendar of activities will be prepared for each development. This schedule will detail out daily and weekly activities, and schedule out all annual maintenance tasks for easy reference and manager planning.

Based on Preventive Maintenance Task Frequency and seasonally related work, the Maintenance Superintendent shall schedule all activities required on an annual basis. For instance, quarterly service of generators might take place during the first week of April, July, October and January. Annual inspection and service of extinguishers might be done in October. Boiler cleaning might be done in July. The Heating Systems Coordinator will be involved in assisting to schedule out heating related systems maintenance and the Service Systems Coordinator will assist with fire alarm maintenance, elevator maintenance and other items. The Garage staff will schedule preventive maintenance on all trucks.

Forms and procedures for producing this plan have been developed and are located in the SOP Master Building Systems Appendices on the S: FamEld Drive

## 2.4 Maintenance of Service Records

Each development shall maintain a complete record of all preventive maintenance services performed on an annual, fiscal year basis (April 1 through March 31). This shall be set up as a loose-leaf binder divided into sections for each category of preventive maintenance, pest management, Building and Grounds Quarterly Inspections and landscape care completed at the development. This is referred to in this manual as the "Annual Service Record Binder or Book." Copies of all inspections, service records, and repair records shall be maintained in this binder for all systems and structures subject to preventive maintenance. Those areas, such as building and grounds walk-through short-form inspections and daily fireman log sheets, which create voluminous amounts of paper, may be set up in separate binders or files, in chronological order, starting over each April 1.

The following chapters describe, at the end of each system or structure defined, what records must be maintenance in the Annual Service Record Binder or Book. Records may include inspection reports, service records from contractors, service checklists from staff, and repair records, both from contractors and staff (i.e. work orders).

# Chapter 3 General Standards for Maintenance of Mechanical spaces

This chapter is included as a supplement to the information found in each of the building systems chapters that follow. This chapter deals with the responsibility of site staff to maintain the spaces that mechanical equipment is housed in.

Standard: All boiler rooms and other mechanical spaces shall be maintained securely, cleanly, litter and debris free, and well lit at all times. Areas should be painted wherever practical in order to achieve a high level of cleanliness.

## 3.1 Boiler Rooms

It is the responsibility of site staff – managers and maintenance superintendents – to insure that boiler rooms are maintained properly at all times. These tasks are the responsibility of the Fireman. Boiler rooms must be:

- Able to be locked and properly secured whenever no one is in it
- Have no broken windows
- Be properly and completely lit at all times
- Be free of debris and dirt at all times
- Be free of storage (do not use boiler rooms as storage areas)
- Have organized shop areas, if any
- No furniture except desk and desk chair. No TV's
- Have clean desk areas, if any
- Have clean bathrooms, if any
- Have a painted floor (repaint at least annually with heavy duty deck paint)
- Have walls painted at least 8 feet high (repaint at least every two years)
- Have working eye wash stations (if using disposable stations monitor expiration date for washing solution and replace as needed.)
- Have working and well located fire extinguishers, serviced annually
- Have working door, burner and flood alarm systems
- Be free of any safety hazards (mark or paint all low pipes)
- Have Burn kits and First Aid kits maintained and up to date
- Have spill kits and barrels (in oil fired boiler rooms)

## 3.2 Interior transformer areas

All interior transformer areas must be in rooms, which can be locked and are maintained in a locked state at all times, free of clutter and debris. Treat any leaks as hazardous and report to Building Services immediately.

## 3.3 Transformers: (exterior)

Some transformers are located outside, in enclosed fenced in areas. These fences must be securely locked at all times and the areas inside the fence clear of debris, weeds and shrubbery. If transformer is not enclosed it should be clean and free of clutter, shrubs trimmed.

## 3.4 Dispersed boilers/hot water heater areas of basements or rooms

If these items are in rooms, they should be kept locked at all times. Each such room should be on the same key for ease of maintenance. Some of these items may not be in separate rooms, increasing the need to insure that the basement itself is secure. The areas around this equipment should be clean and free of debris. It is helpful to paint the floor area around the equipment or if in a separate room, to paint both walls (to 8 feet) and floors. All such areas must be clearly lit at all times.

## 3.5 Primary and Secondary Electrical Panels

If main electric panels are in separate rooms, the rooms must be locked at all time. If not, it is critical to keep the basement locked at all times. All panels must be kept covered at all times, and locked. No storage is permitted near electrical panels and access to electrical panels must be free at all times.

## 3.6 Generators

If generators are in separate rooms, the rooms must be locked at all time. If not, it is critical to keep the basement locked at all times. No storage is permitted near generators. Generator rooms must be painted and kept free of debris and dirt at all times.

Some generators are located outside, in enclosed fenced in areas. These fences must be securely locked at all times and the area inside the fence free of debris, weeds and shrubbery.

## 3.7 Condensate return units

Condensate return units are generally in open areas of basements. Insure that lighting is available at all times at the unit. Maintain the areas free of debris and dirt. Keep spare pumps and motors on hand.

## 3.8 Sump pumps

Sump pumps will be located in a variety of locations including boiler rooms and basements. Keep spares on hand. You should have 2 that are operational and a spare. Insure that no debris is in the sump pump pit and that sump pump areas are well lit.

## 3.9 Cable and phone junction boxes

Cable and phone junction boxes are generally located in basements but may also be in back stairwells of some developments. These boxes should be covered and locked at all times. This is the responsibility of the phone and cable companies.

## 3.10 Maintenance Shops & Offices

- Clean; organized; free of clutter
- Rest room clean, operational
- Doors secure; locks functional
- Floors and walls painted
- Adequate lighting
- Proper storage of flammable materials
- Floors and walls painted
- Appropriate furniture
- Lunch area for staff including table, chairs, refrigerator, microwave, sink (if possible) and lockers

## 3.11 Responsibility for Maintaining Standards

It is the responsibility of site staff to insure that all of the above standards are met. Day shift firemen are primarily responsible for boiler room maintenance items under the supervision of the site superintendent. Supervisory staff from the Building Services Division will perform regular inspections and assist in supervision, but the primarily responsibility for meeting these standards is the site superintendent's.

Similarly, the site superintendent is responsible for maintenance of all other mechanical spaces. Laborers and janitor/groundskeepers generally carry out the work, though tradesmen should be asked to conduct regular PM inspections and electricians and painters may be needed to conduct certain other tasks related to these spaces.

## 3.12 Responsibility for Materials, Supplies and Parts

It is the Site Superintendent's and Manager's responsibility to provide all necessary materials, tools, supplies and replacement parts needed to maintain boiler rooms and all equipment. Firemen or Building Services staff may make requests for such items, but orders shall be placed and managed by site staff.

## 3.13 Dealing with Oil Spills and Chemicals

Developments that use oil must purchase a 20-gallon Spill Pack Kit. This kit contains what you would need if there were an oil spill in the Boiler room.
All oil spills must be entered in the logbook and noted how the spill was cleaned up. It must be reported to the Heating Plant Coordinator, Manager and Maintenance Superintendent immediately.

Spill Pack Kits can be purchased through the Grainger catalog or at any oil supply company.

# Chapter 4 Electrical systems and Exterior/common area lighting

## 4.1 Electrical Distribution System

### 4.1.1 Objective:

To insure the continuous provision of electricity to the development

### 4.1.2 Scheduled Activities

**Annually:**

Manager/Maintenance Superintendent Responsibilities:
Once a year, the Manager shall arrange for an in-house Electrician to perform a general inspection of the electrical distribution system. The electrician shall record on a site-map the location of all main service panels and the specifications for each unit. Based on this list, the Manager shall include stock requirements in their stock inventory system for the development.

Electrician
Annually, the Electrician shall perform a general inspection of the electrical system including, but not limited to:

1. Pulling the main circuit boards
2. Checking all circuit breakers and breaker boxes
3. Checking all main feeders
4. Tightening all lugs

### 4.1.3 Systems Inventory Information

An Electrical Distribution Systems Inventory and Specification sheet, including location and replacement part information, shall be maintained in the Systems Inventory Book and updated as needed. A site plan of all main service panel locations will be used to supplement this information and will be maintained in the Systems Inventory book. The Inventory shall also include a master checklist for inspections and services specific to the system at the site, as applicable. See S: FamEld Drive, SOP Master Building Systems Appendices for sample master Electrical Distribution Systems inventory, specification and checklists forms.

### 4.1.4 Service Records

Records of the Electrical Distribution preventive maintenance activities including all inspection and service checklists, repairs etc will be filed in the annual Service Record Binder in the Electrical Section.

All preventive maintenance activities must be included and tracked on your Annual Preventive Maintenance Plan – Schedule and Report form See S: FamEld Drive, SOP Master Building Systems Appendices for sample Annual PM Plan – Schedule and Report Form.

## 4.2 Battery Pack Emergency Lighting Systems

### 4.2.1 Objective:

To insure that all battery pack emergency lighting systems are in good working order in the event of an electrical shut down.

### 4.2.2 Scheduled Activities

**Daily/Weekly**

Laborer/Groundskeeper/Custodian Responsibilities:
During the course of daily work, the Laborer/Groundskeeper/Custodian should note any obvious breakage of the emergency lighting system and report such breakage immediately.

**Monthly**
Manager/Maintenance Superintendent's Responsibilities:
Once a month, the Manager/Maintenance Superintendent shall test the emergency lighting system by pressing the test button, then observing all lights to determine that they come on. If it indicates 'low charge' the battery must be changed.

**Quarterly**
Manager/ Maintenance Superintendent's Responsibilities:
To conduct a formal inspection of the building exterior for each unique building address. Note any breakage/defect of the emergency lighting system. Test the emergency lighting system by pressing the test button, then observing all lights to determine that they come on. If it indicates 'low charge' the battery must be changed. All deficiencies found during any inspection shall be transferred to work orders for correction as either emergency or Building and Grounds priorities.

**As Needed**
Manager/Maintenance Superintendent Responsibilities:
In the event that any component of an emergency lighting system is not working, the Manager or Maintenance Superintendent shall create a work order and/or contact a contractor to make appropriate repairs. In the event that an in-house Electrician completes the work, the Manager shall obtain all stock required for the repair. All such repairs shall be treated as very urgent.

### 4.2.3 Systems Inventory Information

A Battery Pack Emergency Lighting System Inventory and Specification sheet, including location and replacement part information, shall be maintained in the Systems Inventory Book and updated as needed. A site plan may be used to supplement this information and will be maintained in the Systems Inventory book. The Inventory shall also include a master checklist for inspections and services specific to the equipment at the site, as applicable. See S: FamEld Drive, SOP Master Building Systems Appendices for sample master Battery Pack Emergency Lighting system inventory, specification and checklists forms

### 4.2.4 Service Records

Records of all Battery Pack emergency lighting system preventive maintenance activities including all inspection and services checklists, repairs etc will be filed in the annual Service Record Binder in the Electrical Section. Records of all preventive maintenance (P) work orders shall be filed in the annual Service Record Binder as well as the work order system files. Records of all preventive maintenance purchase orders shall be filed in the annual Service Record Binder as well as the purchase order system files.

Copies of all formal Quarterly Building and Grounds Inspection forms must be included in the annual Service Record Binder.

All preventive maintenance activities must be included and tracked on your Annual Preventive Maintenance Plan – Schedule and Report form See S: FamEld Drive, SOP Master Building Systems Appendices for sample Annual PM Plan – Schedule and Report Form.

## 4.3 Intercoms

### 4.3.1 Objective:

To insure an operable intercom system for the safety of all residents.

### 4.3.2 Scheduled Activities:

**Annually**

Manager/Maintenance Superintendent Responsibilities:
In garden style buildings, the Manager/Maintenance Superintendent shall test all intercoms in the course of the annual living unit inspection program to insure their correct operation. In multi-family dwelling buildings, the Manager/Maintenance Superintendent may choose to perform the annual testing of the intercom system with the assistance of a Laborer/Groundskeeper. Utilizing two way radios is an efficient method of performing these inspections.

In the event that any intercom is not working properly, the Manager/Superintendent shall create a work order and/or issue a purchase order to have the intercom repaired by a contractor or an in-house Electrician.

Note: The intercom test can serve a second purpose by determining if any residents are buzzing people in without checking on who they are first. This can be an important part of safety education training.

### 4.3.3 Systems Inventory Information

An Intercom/door bell system Inventory and Specification sheet, including location and replacement part information, shall be maintained in the Systems Inventory Book and updated as needed. A site plan may be used to supplement this information and will be maintained in the Systems Inventory book. The Inventory shall also include a master checklist for inspections and services specific to the equipment at the site, as applicable. See S: FamEld Drive, SOP Master Building Systems Appendices for sample master Intercom system inventory, specification and checklists forms

### 4.3.4 Service Records

Records of all Intercom/door bell systems preventive maintenance activities including all inspection and services checklists, repairs etc will be filed in the annual Service Record Binder in the Electrical Section. Records of all preventive maintenance (P) work orders shall be filed in the annual Service Record Binder as well as the work order system files. Records of all preventive maintenance purchase orders shall be filed in the annual Service Record Binder as well as the purchase order system files. Records of intercom/door bell system repairs shall also be maintained as part of the Living Unit inspection system.

All preventive maintenance activities must be included and tracked on your Annual Preventive Maintenance Plan – Schedule and Report form See S: FamEld Drive, SOP Master Building Systems Appendices for sample Annual PM Plan – Schedule and Report Form.

## 4.4 Emergency Pull Cord (Call-for-Aid) Systems

### 4.4.1 Objective:

To insure that all pull cords are in proper working order to insure resident safety.

### 4.4.2 Scheduled Activities:

As-Needed
Manager/Maintenance Superintendent's Responsibilities:
Any time that an emergency pull cord is found to be out of order, the Manager or Maintenance Superintendent shall create an emergency work order, or issue an emergency purchase order to have it repaired immediately. This includes insuring that the chain or cord is hanging loosely below the actual switch and that all lights and enunciators are working properly.

**Annually**
Manager's Responsibilities:
Annually as part of every Living Unit Inspection, the Manager shall test the emergency pull cord to determine whether or not it is in good working order. In the event that the pull cord does not work, an emergency work order or purchase order shall be issued to have it repaired immediately.

### 4.4.3 Systems Inventory Information

An Emergency Pull Cord System Inventory and Specification sheet, including location of enunciators and enunciator panels and replacement part information, shall be maintained in the Systems Inventory Book and updated as needed. A site plan may be used to supplement this information and will be maintained in the Systems Inventory book. The Inventory shall also include a master checklist for inspections and services specific to the equipment at the site, as applicable. See S: FamEld Drive, SOP Master Building Systems Appendices for sample master Emergency Pull Cord system inventory, specification and checklists forms

### 4.4.4 Service Records

Records of all Emergency Pull Cord System preventive maintenance activities including all inspection and services checklists, repairs etc will be filed in the annual Service Record Binder in the Electrical Section. Records of all preventive maintenance (P) work orders shall be filed in the annual Service Record Binder as well as the work order system files. Records of all preventive maintenance purchase orders shall be filed in the annual Service Record Binder as well as the purchase order system files. Records of Emergency Pull Cord System repairs shall also be maintained as part of the Living Unit inspection system.

All preventive maintenance activities must be included and tracked on your Annual Preventive Maintenance Plan – Schedule and Report form See S: FamEld Drive, SOP Master Building Systems Appendices for sample Annual PM Plan – Schedule and Report Form.

## 4.5 Exterior Lights

### 4.5.1 Objective:

To maintain maximum exterior lighting at all times.

### 4.5.2 Scheduled Activities:

**Daily/Weekly**
Laborer/Groundskeeper/Custodian Responsibilities:

To inspect all exterior lights [mounted on buildings or pole lights] daily and report any problems such as broken fixtures or missing/broken bulbs to the Manager/Maintenance Superintendent immediately. All problems must be recorded on the weekly Building & Grounds short-form. The Manager/Maintenance Superintendent shall issue a work order for the repairs.

**Weekly**
Manager/ Maintenance Superintendent's Responsibilities:
During each weekly Building and Grounds Walk-through inspection, the Manager/Superintendent shall observe all exterior lights to note any problems. Manager/Superintendent must also review the completed weekly Building and Grounds inspection forms to make sure that all deficiencies recorded were reported [and visa-versa] and transferred to work orders for correction as either emergency or Building and Grounds priorities.

**Quarterly**
Manager/ Maintenance Superintendent's Responsibilities:
To conduct a formal inspection of the building exterior for each unique building address. Note any broken fixtures or missing/broken bulbs. All deficiencies found during any inspection shall be transferred to work orders for correction as either emergency or Building and Grounds priorities.

**Annually**
Manager Responsibilities:
Once each year, in October, the Manager shall inspect all exterior lights at night to insure that all are working properly.

Maintenance Superintendent Responsibilities:
Once each year, during the period from May to October, the Maintenance Superintendent shall arrange to change/repair/re-lamp all non-working exterior lights.

**As Needed:**
Maintenance Superintendent Responsibilities:
In the event that a lamp burns out or there are other problems with the exterior lights between annual re-lamping dates, the Maintenance Superintendent shall issue a work order and arrange to have the exterior light repaired.

### 4.5.3 Systems Inventory Information:

An Exterior Light Inventory and Specification sheet, including location and replacement part information, shall be maintained in the Systems Inventory Book and updated as needed. A site plan may be used to supplement this information and will be maintained in the Systems Inventory book. The Inventory shall also include a master checklist for inspections and services specific to the equipment at the site, as applicable. See S: FamEld Drive, SOP Master Building Systems Appendices for sample master Exterior Light system inventory, specification and checklists forms.

### 4.5.4 Service Records

Records of all Exterior Lights preventive maintenance activities including all inspection and services checklists, repairs etc will be filed in the annual Service Record Binder in the Electrical Section. Records of

all preventive maintenance (P) work orders shall be filed in the annual Service Record Binder as well as the work order system files. Records of all preventive maintenance purchase orders shall be filed in the annual Service Record Binder as well as the purchase order system files.

All preventive maintenance activities must be included and tracked on your Annual Preventive Maintenance Plan – Schedule and Report form See S: FamEld Drive, SOP Master Building Systems Appendices for sample Annual PM Plan – Schedule and Report Form.

# Chapter 5 Elevators

## 5.1 Objective:

To insure the safe and continuous operation of elevators through regular service and inspection. To maintain elevators in accordance with applicable ordinances and codes,

## 5.2 Scheduled Activities:

**Daily/Weekly**
Laborer/Groundskeeper/Custodian Responsibilities:
Daily, the Laborer/Groundskeeper/Custodians shall clean the elevator cabs and sills, check the lighting in the cab and replace any burnt out bulbs (if applicable), check the call buttons, wipe down the electric eye and determine that each elevator is operable. In the event that an elevator is not functioning properly, he/she will report this to the Manager, or in his/her absence, to the Maintenance Superintendent. All problems must be recorded on the weekly B&G inspection form. If a certain address is habitually out of service due to use or vandalism, it should be brought to the attention of the Service Programs Coordinator.

**Monthly**
Elevator Service Contractor Responsibilities:
The Elevator Service Contractor is responsible for inspecting and servicing each elevator at least once each month or more frequently if so specified in the service contract. The tasks to be completed and the frequency for each task are defined on the BHA elevator preventive maintenance chart that is maintained in the elevator machine room. See S: FamEld Drive – SOP Master Building Systems Appendices for master Elevator preventive maintenance chart.

**Quarterly**
Manager/ Maintenance Superintendent's Responsibilities:
To conduct a formal inspection of the building's common areas for each unique building address. Record any problems noted with the Elevators and notify the Service Programs Coordinator.

**Annually**
Elevator Service Contractor /Service Programs Coordinator Responsibilities:
The Elevator Service Contractor is responsible for arranging for and coordinating with the Service Programs Coordinator, an annual inspection of all elevators by the State Elevator Inspector.

**As Needed**
Service Programs Coordinator Responsibilities:
The Service Programs Coordinator is responsible for bidding the elevator service contract every two years, for monitoring monthly performance against contract provisions, for insuring payments against the contract, and for making decisions concerning major repair work within the contract.

Manager/Maintenance Supervisor Responsibilities:
The Manager/Maintenance Supervisor is responsible for insuring that the elevator is properly cared for by the Laborer/Groundskeeper/Custodian, for reporting all problems with the elevator to the Service Programs Coordinator, and for obtaining copies of service slips for every visit by an Elevator service contractor. The Manager has authority to call the contractor for service on the elevator whenever it malfunctions during normal working hours. All calls for service shall be entered in the Elevator Service Log and tracked. See S: FamEld Drive – SOP Master Building Systems Appendices for master Elevator Service Log form.

Elevator Service Contractor's issues such as response times for emergencies, chronic issues with the same address or monthly maintenance work not performed should be brought to the attention of the Service Programs Coordinator immediately.

## 5.3 Policies for calling for emergency service

During normal working hours, the Manager and the Maintenance Superintendent have authority to contact the Elevator service contractor for service.

During non-working hours, The Work Order Center shall contact the Emergency Response Service Manager to report the problem. The ERS Manager will have authority to contact the Elevator service contractor for service.

In Developments with Special Assignment Laborers, the Work Order Center shall contact the Special Assignment Laborer, who will then check to determine if the elevator is malfunctioning, and be authorized to contact the Elevator service contractor for service. If the Special Assignment Laborer calls for service, he/she must meet the contractor, state the reason they have requested emergency service and sign service slip from elevator service contractor. A fire alarm will trigger the elevator into an emergency recall position. The Fire Alarm service contractor will have to be called to reset the system.

## 5.4 Policies for Inspection Notifications:

The manager is responsible for notifications to residents when the elevator car will be out of service due to inspections. Fire Alarm and Generator service contractors must be notified for yearly inspections and access must be provided. This should be coordinated with the Service Programs Coordinator.

## 5.5 Systems Inventory Information:

An Elevator Inventory and Specification sheet, including location and service contract information shall be maintained in the Systems Inventory Book and updated as needed. A site plan may be used to supplement this information and will be maintained in the Systems Inventory book. The Inventory shall also include a master checklist for inspections and services specific to the equipment at the site, as applicable. See S: FamEld Drive, SOP Master Building Systems Appendices for sample master Elevator inventory, specification and checklists forms, Elevator Service Logs and Elevator PM Chart.

## 5.6 Service Records:

Records of all Elevator preventive maintenance activities including all inspection checklists, service slips, repairs etc will be filed in the annual Service Record Binder in the Elevator Section.
All preventive maintenance activities must be included and tracked on your Annual Preventive Maintenance Plan – Schedule and Report form See S: FamEld Drive, SOP Master Building Systems Appendices for sample Annual PM Plan – Schedule and Report Form.

The Elevator Service Contractor is responsible for filling in the BHA Elevator Preventive Maintenance Chart maintained in the elevator machine room at the time of each servicing and for providing a service slip for every visit (preventive or service visit) with information on the date, time and duration of the visit and on the work performed. This service slip shall be left with the Manager.

The Manager is responsible for maintaining all service call slips in the Service Records Binder. Service Programs Coordinator shall be responsible for maintaining central records of all service and testing etc.

# Chapter 6 Fire Safety Systems

## 6.1 Fire Alarm – Connected Systems

### 6.1.1 Objective:

To insure that the fire alarm system is operating properly and is maintained in accordance with applicable ordinances and codes.

### 6.1.2 Scheduled Activities:

**Weekly/Daily**
Manager/Superintendent/Laborer/Groundskeeper/Custodian Responsibilities:
The Manager/Superintendent/Laborer/Groundskeeper/Custodian shall check the master alarm panel to determine that there is no trouble at the panel board, as indicated by a trouble light. The master alarm panel is located in various buildings at different Developments. In some Developments the master panel is located in the management office, in which case it is the responsibility of the Manager and management staff to monitor, record and report any problems.

Any problems with the panel or any fire alarm devices (i.e. smoke detectors and pull stations) shall be noted and reported to the Manager [whether it is located in the management office or elsewhere]. All problems must be recorded on the weekly Building & Grounds Inspection short forms. Newer panels will sound an alarm when a trouble is identified. This will have to be acknowledged in order to silence the alarm. The system stores the trouble in its memory. The alarm service contractor will have to be dispatched to repair/replace the device.

**As Needed/Weekly**
Manager Responsibilities:
The Manager shall report any problems with the fire alarm system immediately upon being informed of the problem to the Service Programs Coordinator. The Manager shall also check all pull stations and the alarm panel during the regular weekly walk-through inspection.

Fire Alarm Service Contractor/In-house Electrician Responsibilities:
The Fire Alarm service contractor or in-house Electrician shall be responsible for re-setting the alarm system acknowledging the trouble after every fire alarm. The fire alarm contractor should respond within two hours to fully re-set the system. If the contractor does not show up in this time period, managers and maintenance personnel should call them. Local device replacement only will be done by site electricians and these must be of the same type and brand as the existing system.

**Quarterly**
Manager Responsibilities:
The Manager shall coordinate all alarm testing procedures through appropriate notification to residents and by assisting the contractor by having the Laborer/Groundskeeper/Custodian available during testing to open apartment doors as needed.

Fire Alarm Service Contractor Responsibilities:
The contractor is responsible for quarterly testing of the fire alarm system. At each quarterly visit all alarm initiating devices (i.e. pull stations, smokes, system devices) will be checked, including 25% of all apartment smoke detectors shall be tested, so that every device is tested at least once each year. The contractor shall be responsible for coordinating all testing with the development manager.

The Fire alarm service contractor is responsible for completing the Quarterly Inspection Reports and submitting copies to the Manager and to the Fire Department. The contractor is responsible for leaving service slips upon completion of any alarm reset or service visit with the manager.

**Every two Years**
Service Programs Coordinator Responsibilities:
The Service Programs Coordinator shall be responsible for bidding a service contract once every two years, or at such annual intervals as may be determined to be necessary. The Service Programs Coordinator shall be responsible for maintaining central records of all service and testing, and for payment of all invoices. The services programs coordinator shall be responsible for insuring that all maintenance over and above regular testing is necessary and for approving all expenditures of this type.

### 6.1.3 Systems Inventory Information:

A Fire Alarm System Inventory and Specification sheet, including location of all devices and service contract information shall be maintained in the Systems Inventory Book and updated as needed. A site plan may be used to supplement this information and will be maintained in the Systems Inventory book. The Inventory shall also include a master checklist for inspections and services specific to the system at the site. See S: FamEld Drive, SOP Master Building Systems Appendices for sample master Fire Alarm inventory, specification and checklists forms...

### 6.1.4 Service Records:

Development Records
Records of all Fire Alarm System preventive maintenance activities including all inspection checklists, service visits, regular testing, alarm resets and repairs etc will be filed in the annual Service Record Binder in the Fire Alarm Systems Section. The Manager shall maintain copies of all reports from the Fire Alarm Testing Contractor in the Service Record binder in chronological order and shall send the original to the Service Programs Coordinator immediately upon its receipt.

All preventive maintenance activities must be included and tracked on your Annual Preventive Maintenance Plan – Schedule and Report form See S: FamEld Drive, SOP Master Building Systems Appendices for sample Annual PM Plan – Schedule and Report Form.

Service Programs Coordinator Records
Records of all service visits, including regular testing, alarm resets, and repair calls shall be maintained by the service programs coordinator, along with invoices.

## 6.2 Fire Extinguisher Inspection and Service Procedure

### 6.2.1 Objective:

To insure that all required fire extinguishers are in place and serviced on a regular basis in accordance with applicable ordinances and codes.

### 6.2.2 Scheduled Activities:

**Daily/Weekly**
Laborer/Groundskeeper/Custodian Responsibilities:

Routinely, the Laborer/Groundskeeper/Custodian is responsible for checking that all fire extinguishers are in their proper locations, and that the seal is not broken and the inspection tag is in place. Any instances should be brought to the immediate attention of the Manager and/or the Maintenance Superintendent. All problems should be recorded on the weekly Building & Grounds Inspection short forms.

**Weekly**
Manager/ Maintenance Superintendent's Responsibilities:
During each weekly Building and Grounds Walk-through inspection, the Manager/Superintendent shall observe all fire extinguishers to note any problems. Manager/Superintendent must also review the completed weekly Building and Grounds inspection forms to make sure that all deficiencies recorded were reported [and visa versa] and transferred to work orders for correction as either emergency or Building and Grounds priorities.

**Quarterly**
Manager/ Maintenance Superintendent's Responsibilities:
To conduct a formal inspection of all building common areas. Inspect all fire extinguishers to make sure that they are in their proper locations, and that the seal is not broken and the inspection tag is in place. All deficiencies found during any inspection shall be transferred to work orders for correction as either emergency or Building and Grounds priorities.

**Annually**
Manager Responsibilities:
The Manager shall issue a purchase order on an annual basis to have all fire extinguishers inspected/serviced by an appropriate contractor. The Manager shall insure that all such inspections include appropriate tagging of all extinguishers indicating the date of the inspection.

**Every five years**
Manager Responsibilities:
Every five years, the Manager shall issue a purchase order to have all fire extinguishers pressure tested by an appropriate contractor.

### 6.2.3 Systems Inventory Information

A Fire Extinguisher Inventory and Specification sheet, including location, types, sizes, date of purchase information shall be maintained in the Systems Inventory Book and updated as needed. A site plan may be used to supplement this information and will be maintained in the Systems Inventory book. The Inventory shall also include a master checklist for inspections and services specific to the equipment at the site, as applicable. See S: FamEld Drive, SOP Master Building Systems Appendices for sample master Fire Extinguisher inventory, specification and checklists forms.

### 6.2.4 Service Records

Records of all Fire Extinguisher preventive maintenance activities including all inspection and service checklists, repairs/replacements etc will be filed in the annual Service Record Binder in the appropriate Section.

All preventive maintenance activities must be included and tracked on your Annual Preventive Maintenance Plan – Schedule and Report form See S: FamEld Drive, SOP Master Building Systems Appendices for sample Annual PM Plan – Schedule and Report Form.

All fire extinguishers shall be tagged by the contractor including the date inspected.

## 6.3 Sprinkler System Inspection and Service Procedure

### 6.3.1 Objective:

To insure the continuous, effective and efficient operation of the sprinkler system in accordance with all applicable codes and ordinances.

### 6.3.2 Scheduled Activities:

**Daily/Weekly/as needed**

Custodian/Laborer/Groundskeeper's Responsibilities:

The Custodian/Laborer/Groundskeeper shall report any leaking or damaged sprinkler heads as it is noticed to the manager/maintenance superintendent. The Laborer/Groundskeeper or Resident Custodian shall perform a visual inspection of the fire pump, check pump room heat weekly and report any problems/malfunction to the Manager/maintenance superintendent immediately. Any problems/ malfunction should be recorded on the weekly Building & Grounds short-form. Resident Custodians and Laborers/Groundskeepers shall remove all tape or other covering used to protect sprinkler heads during vacant unit preparation.

Manager's Responsibilities:

The Manager is responsible for reporting any damage to or suspected malfunctioning of the sprinkler system or pumps to the Service Programs Coordinator as soon as a problem is detected. The Manager shall arrange with the Superintendent to order and maintain additional heads on site for immediate replacement if/when the need arises.

**Annually**

Manager/Maintenance Superintendent's Responsibilities

The Manager/Superintendent is responsible for coordinating all sprinkler flow and pump testing with the Service Programs Coordinator and the contractor on an annual basis. This service should include, but not be limited to, flow testing to insure that alarms will sound if sprinkler is triggered, and, pump testing for fire and/or jockey pump.

Service Programs Coordinator Responsibilities

The Service Program Coordinator shall be responsible for obtaining quotes/bids on an annual basis and issuing a contract or purchase order for annual testing of the sprinkler system by an independent licensed sprinkler systems company. This testing is to insure that pump will perform to provide the designed amount of water at the designed pressure in the event of a fire. The Service Programs Coordinator shall be responsible for insuring adequate oversight of the contract; issuing work orders or PO for follow up repair work, and paying bills.

### 6.3.3 Systems Inventory Information

A Sprinkler System Inventory and Specification sheet, including location of all devices, replacement parts, as needed and service contract information shall be maintained in the Systems Inventory Book and updated as needed. A site plan may be used to supplement this information and will be maintained in the Systems Inventory book. The Inventory shall also include a master checklist for inspections and services specific to the equipment at the site, as applicable. See S: FamEld Drive, SOP Master Building Systems Appendices for sample master Sprinkler System inventory, specification and checklists forms.

### 6.3.4 Service Records

Development Records

Copies of all records of all Sprinkler System preventive maintenance activities including all inspection checklists, service visits, annual testing and repairs etc will be filed in the annual Service Record Binder in the Fire Alarm Systems Section. The Manager shall maintain copies of all reports from the Sprinkler System Testing Contractor in the Service Record binder in chronological order and shall send the original to the Service Programs Coordinator immediately upon its receipt. Records of all preventive maintenance (P) work orders shall be filed in the annual Service Record Binder as well as the work order system files. Records of all preventive maintenance purchase orders shall be filed in the annual Service Record Binder as well as the purchase order system files.

All preventive maintenance activities must be included and tracked on your Annual Preventive Maintenance Plan – Schedule and Report form See S: FamEld Drive, SOP Master Building Systems Appendices for sample Annual PM Plan – Schedule and Report Form.

Service Programs Coordinator Records
Records of all service visits, including annual testing and repair calls shall be maintained by the service programs coordinator, along with invoices.

## 6.4 Smoke Detector Service Policy

### 6.4.1 Objective:

To insure that all smoke detectors in all common areas are operational at all times. Note: all hard-wired smoke detectors include a battery for back up purposes. Therefore, all new smoke detectors installed, even it the hard-wired type will require annual battery changes.

### 6.4.2 Scheduled Activities:

**Daily/Weekly/As Needed**
Custodian/Laborer/Groundskeeper Responsibilities:
The Custodian/Laborer/Groundskeeper shall note all missing or damaged battery operated smoke detectors during the course of day to day work and report any problems immediately to the Manager/Superintendent. All problems must be recorded on the weekly Building and Grounds inspections short-form. In the event that a battery needs replacing (as indicated by a "beep" from the unit) the Custodian/Laborer/Groundskeeper shall immediately replace the battery. Damaged device enclosures must also be noted.

Manager/Maintenance Superintendent Responsibilities:
The Manager/Maintenance Superintendent is responsible for issuing a work order and instructing a mechanic to replace all defective or missing battery smoke detectors immediately upon learning of the problem. The Manager/Maintenance Superintendent is responsible for keeping on hand adequate numbers of batteries and smoke detectors. Smoke detectors can be ordered from the BHA 120 Stock System. Batteries on hand for replacement should be checked for date code before being installed.

**Quarterly**
Manager/Maintenance Superintendent Responsibilities
The Manager is responsible for testing all battery-operated smoke detectors on each quarterly building and grounds inspection by activating the test button. The Manager may delegate this responsibility to the Laborer/Groundskeeper or Electrician, but shall be responsible for insuring that this is completed fully every quarter.

**Annually**
Custodian/Laborer/Groundskeeper Responsibilities:
Once every year, in October, the laborer/groundskeeper shall replace all batteries in all battery operated smoke detectors in common areas as a preventive maintenance measure. This shall also apply to batteries

in the new type of hard-wired smoke detectors that include a battery back up. Batteries in smoke detectors in apartments shall be changed at the time of the annual Living unit inspection.

### 6.4.3 Systems Inventory Information

A Smoke Detector Inventory and Specification sheet, including location of all devices, including information on battery or hard wired, and system connected or not connected and replacement part information shall be maintained in the Systems Inventory Book and updated as needed. A site plan may be used to supplement this information and will be maintained in the Systems Inventory book. The Inventory shall also include a master checklist for inspections and services specific to the equipment at the site, as applicable.
See S: FamEld Drive, SOP Master Building Systems Appendices for sample master Smoke Detector inventory, specification and checklists forms.

### 6.4.4 Service Records

Copies of all records of all Smoke Detectors preventive maintenance activities including all inspection and service checklists, regular testing and repairs etc will be filed in the annual Service Record Binder in the Fire Alarm Systems Section. All defective smoke detectors shall be reported on the Building and Grounds Inspections [Weekly - Short and Quarterly - Long Forms] and LUI inspections. All replacement of batteries in common areas must be recorded on a checklist format using the smoke detector inventory/specification sheets and filed in the Service Record Binder.

Records of all preventive maintenance (P) work orders shall be filed in the annual Service Record Binder as well as the work order system files. Records of all preventive maintenance purchase orders shall be filed in the annual Service Record Binder as well as the purchase order system files

All preventive maintenance activities must be included and tracked on your Annual Preventive Maintenance Plan – Schedule and Report form See S: FamEld Drive, SOP Master Building Systems Appendices for sample Annual PM Plan – Schedule and Report Form.

## 6.5 Smoke Hatch Inspection and Service Procedure

### 6.5.1 Objective:

To insure that the smoke hatch component of the fire alarm system is operating properly and is maintained in accordance with applicable ordinances and codes.

### 6.5.2 Scheduled Activities:

**Daily/Weekly**
Custodian/Laborer/Groundskeeper Responsibilities:
The Laborer/Groundskeeper shall visually inspect the smoke hatch for any noticeable problems, such as opened hatches, tampering with manual cords and/or vandalism. The Custodian/Laborer/Groundskeeper shall report any problems to the Manager/Maintenance Superintendent immediately. All problems must be recorded on the weekly Building & Grounds short-forms.

Manager/Maintenance Superintendent Responsibilities:
The Manager/Maintenance Superintendent shall report any problems with the smoke hatch or other fire alarm system components immediately upon being informed of the problem to the Service Programs Coordinator. The Manager/Maintenance Superintendent shall also check the pull cord and the hatch during

all weekly walk-through inspections. The Manager/Maintenance Superintendent shall report all resets to the Service Programs Coordinator immediately following each occurrence.

**Quarterly**
Manager Responsibilities:
The Manager shall coordinate all testing procedures related to smoke hatches, as part of any regular connected system inspection, through appropriate notification to residents and by assisting the contractor by having the Custodian/Laborer/Groundskeeper available during testing to allow entry into common area hallways as needed.

**Annually / Every 2 years**
Service Programs Coordinator Responsibilities:
The Service Programs Coordinator shall be responsible for bidding a service contract once every two years, or at such annual intervals as may be determined to be necessary. The Service Programs Coordinator shall be responsible for insuring that all maintenance over and above regular testing is necessary and for approving all expenditures of this type.

### 6.5.3 Systems Inventory Information

A Smoke Hatch Inventory and Specification sheet, including location and replacement part information shall be maintained in the Building Systems Inventory Book and updated as needed. A site plan may be used to supplement this information and will be maintained in the Systems Inventory book. The Inventory shall also include a master inspection and service checklist specific to the equipment at the site, as applicable.
See S: FamEld Drive, SOP Master Building Systems Appendices for sample master Smoke Hatch inventory, specification and checklists forms.

### 6.5.4 Service Records:

Development Records:
Copies of all records of all Smoke Hatch preventive maintenance activities including all inspection and service checklists, regular testing and repairs etc will be filed in the annual Service Record Binder in the Fire Alarm Systems Section. All defective smoke hatches shall be reported on the Building and Grounds Inspections [both the weekly short-form and the quarterly long-form].

Records of all preventive maintenance (P) work orders shall be filed in the annual Service Record Binder as well as the work order system files. Records of all preventive maintenance purchase orders shall be filed in the annual Service Record Binder as well as the purchase order system files.

All preventive maintenance activities must be included and tracked on your Annual Preventive Maintenance Plan – Schedule and Report form See S: FamEld Drive, SOP Master Building Systems Appendices for sample Annual PM Plan – Schedule and Report Form.

The Manager shall maintain copies of all reports from the fire alarm testing contractor in the Service Records binder, and shall send the originals to the Service Programs Coordinator immediately upon receipt.

Service Programs Coordinator Records:
The Service Programs Coordinator shall be responsible for maintaining central records of all service and testing.

# Chapter 7 Generators

## 7.1 Objective:

To ensure a continuous, efficient and reliable source of stand-by electrical energy through regular maintenance and service of the emergency generator.

## 7.2 Scheduled Activities:

**Weekly**

Manager/Maintenance Super/Electrician/Resident Custodian Responsibilities:

The Manager/Maintenance Superintendent is responsible for insuring that the Electrician performs a weekly inspection of the emergency generator and performs the tasks detailed on the Emergency Generator Weekly Service Activity Report. The Electrician shall complete the report, sign it and give it to the Maintenance Superintendent each week upon completion. Resident Custodians shall complete this checklist at Elderly/Disabled developments. See S: FamEld Drive, SOP Master Building Systems Appendices to obtain a master copy of Emergency Generator Weekly Service Activity Report.

**Quarterly**

Service Contractor Responsibilities

The service contractor shall be responsible for performing quarterly inspections and service as detailed on the Emergency Generator Inspection and Service Report. See S: FamEld Drive, SOP Master Building Systems Appendices to obtain a master copy of Emergency Generator Inspection and Service Report

**Annually**

Generator Service Program Coordinator Responsibilities:

The Service Program Coordinator is responsible for obtaining quotes and issuing a purchase order on an annual basis to a qualified contractor for quarterly and annual service to the emergency generator and for insuring that the contractor completes all required activities on time.

The Generator Service Program Coordinator is responsible for obtaining quotes and issuing a purchase order on an annual basis to a qualified contractor for annual service and testing of the Automatic Transfer Switch.

Generator Service Contractor Responsibilities

At one quarterly service visit each year, the Generator service contractor shall complete all of the annually required tasks as indicated on the Emergency Generator Inspection and Service Report.

Manager Responsibilities

The manager shall arrange to have the fuel tank topped off at least once per year.

**As Needed**

Manager

The Manager shall be responsible for obtaining quotes and issuing purchase orders for repairs required to the generator which is above and beyond the scope of the annual service contract. The generator should be re-fueled after each use in an emergency condition and topped off on an annual basis.

Service Program Coordinator

The Service Program Coordinator shall be responsible for reviewing repair or replacement decisions in consultation with the manager and assisting the manager in determining actions to be taken.

## 7.3 Systems Inventory Information

A Generator Inventory and Specification sheet, including location and spare/replacement part information, fuel information, regular run time shall be maintained in the Systems Inventory Book and updated as needed. A site plan may be used to supplement this information and will be maintained in the Systems Inventory book. The Inventory shall also a master checklist of inspections and services specific to the equipment at the site, as applicable. See S: FamEld Drive, SOP Master Building Systems Appendices for sample master Generator inventory, specification and checklists forms.

## 7.4 Service Records

Development Records:
Copies of all records of all Generator preventive maintenance activities including all inspection checklists, service visits, regular testing and repairs etc will be filed in the annual Service Record Binder in the Fire Alarm Systems Section. The Emergency Generator Weekly Service Activity Report is to be completed by the Superintendent and Electrician or Resident Custodian (for elderly developments) and submitted to the development Manager. All copies shall be maintained in the Service Record Binder.

The Emergency Generator Inspection and Service Reports are completed by the Generator service contractor at the time of each inspection and are submitted to the development Manager upon completion of the service. The contractor may use its own company form. These reports shall be signed by the contractor's service representative and maintained in the service record binder. The original shall be sent to the Service Programs Coordinator immediately upon receipt.

Records of all preventive maintenance (P) work orders shall be filed in the annual Service Record Binder as well as the work order system files. Records of all preventive maintenance purchase orders shall be filed in the annual Service Record Binder as well as the purchase order system files

All preventive maintenance activities must be included and tracked on your Annual Preventive Maintenance Plan – Schedule and Report form See S: FamEld Drive, SOP Master Building Systems Appendices for sample Annual PM Plan – Schedule and Report Form.

Service Programs Coordinator:
The Service Programs Coordinator shall be responsible for maintaining central records of all service and testing.

# Chapter 8 Heating Systems

## 8.1 Introduction to Heating System Maintenance

Maintenance of heating systems is among the most important maintenance to be performed within the Preventive Maintenance Plan. Heating systems including the central heating plants or the decentralized boiler rooms, the distribution systems, and heating fixtures and controls inside the units require consistent and regular maintenance to serve out their useful life and provide the very basic service of heat and hot water to all residents of our developments. In many locations, significant capital investments have been made to the heating systems throughout the City, and a number of other projects are in the planning, design, or construction stages. It is crucial that we protect this investment.

Managers, Maintenance Superintendents, Heating Systems Coordinator and Inspector, Burner Technicians, Firemen, and Steamfitter's play very important roles.

It is the primary responsibility of the Fireman to perform daily monitoring and maintenance functions to the central heating plants and/or decentralized heating boiler rooms as specified in the union contract and the primary responsibility of the Heating System Coordinator and Inspector to perform more complex tasks, inspect the work of the Firemen and Burner Technicians and make recommendations for replacement and repair of various systems and components. The Heating Systems Coordinator and Inspector will be responsible for monitoring and managing work performed by outside contractors. The Heating Systems Coordinator will retain overall responsibility for overseeing central heating plant and decentralized heating boiler room work.

Because of physical proximity, and in some cases the interrelated system components, of domestic hot water systems at most of the developments supported by the heating system, the central domestic hot water system is covered in this section.

Although preventive maintenance is not performed on electric heating systems (except as part of apartment and buildings and grounds inspections) we have included a short section on the maintenance of stock for electrically heated developments due to the extreme important of having stock on hand for heating repairs in the event of an emergency.

The heating system with forced warm air and heat pumps applies to the building at 52 Chauncy Street in Boston only.

It is extremely important that the material in this section is accurately completed and that the procedures and policies called for are strictly adhered to for the continued proper operation and longevity of the systems across the City.

## 8.2 Central Plants & Decentralized Boiler Rooms

### 8.2.1 Objective

To insure the continuous operation of all heating systems including equipment, controls, and the central domestic hot water components, to prolong the life of all equipment, components, and controls related to efficient heat generation and distribution, and to create and maintain a healthy indoor environment.

### 8.2.2 Scheduled Activities

**Daily**

Fireman Responsibilities:

The fireman is responsible for daily monitoring systems operations, performing routine maintenance services to central heating plants and/or decentralized boiler rooms as required, recording systems operational data and fuel consumption/ordering/delivery data, identifying the system or components' deficiencies if any and reporting them to Manager and/or Maintenance Superintendent, Heating System Coordinator or Inspector immediately. The fireman is responsible for filling out the *Boiler Room Service Activity Report* daily and maintaining a daily log of central plant or decentralized boiler room's activities in the logbook, which shall be located inside the boiler room. The specific duties to be performed at each site as called out in the union contract are detailed on daily *Service Activity Reports* specific to the particular plant or boiler room being serviced, including regular disposal of rubbish and periodic sweeping, washing, and painting of floors. The daily *Service Activity Report* shall be submitted monthly to the Heating System Coordinator/ Inspector and contain a record of all activities performed. The fuel oil ordering/delivery data/slips shall be submitted weekly to the Manager or Maintenance Superintendent. These slips must be forwarded to the Accounts Payable Department in a timely manner [Refer to section 30.13].

*Boiler Room Service Activity reports* specific to the boiler room at your Development can be obtained on the Fam/Eld S:Drive, in the SOP *Profile and Building Systems by Development* folder. This folder is organized into sub-folders for each development. Each Development sub-folder is further divided into folders for each system/component/structure subject to preventive maintenance. The Heating systems information sheets/reports etc, specific to the systems located at your Development can be obtained from the Heating sub-folder within your Development folder.

In the event of very urgent or emergency problems, and the unavailability of the development staff and Heating System Coordinator/Inspector, the fireman shall report the problems directly to the Emergency Response Service. The ERS staff or the dispatcher who answers the call after regulator hours will relay the message to the BHA Duty Officer.

Maintenance Fireman or Fireman during Off-Heating Season Responsibilities:

Spare fireman during heating season shall report to BHA Heating Dept for their daily assignments. Based on the fireman shift coverage, the spare fireman may be assigned to a regular shift covering a specific area if the regular fireman is absent, then he shall follow the procedures specified above. The spare firemen or the maintenance firemen during off-heating season will be assigned to a specific heating plant or boiler room for maintenance and cleaning work daily as instructed by the Heating System Coordinator or Heating System Inspector.

All firemen are responsible to obtain, from the BHA Central Store, maintain, and use the personal protection safety equipment based on the work they are assigned. They are responsible to follow all the regulations and rules outlined in the BHA Employee Safety and Loss Control Handbook and MSDS Binder.

Burner Technicians Responsibilities:

Burner Technicians are responsible to perform daily boiler/burner or system components' repair, adjustment, replacement, or burners' cleaning, fine-tuning, and start-up work as assigned by the Heating System Coordinator and Inspector, or respond to the service calls during evening shift or over weekend as directed by the ERS.

Weekly

Heating Systems Coordinator/Inspector Responsibilities:

The Heating Systems Coordinator or Inspector shall perform no less than a weekly inspection of all central boiler plants and boiler rooms covered by the firemen and shall instruct fireman of additional maintenance at that time in accordance with the development maintenance checklist (see appendix).

The Heating Systems Coordinator has overall responsibilities for insuring proper operation of the heating boilers and major components in the central heating plants and decentralized boiler rooms, which are monitored and covered by the firemen on daily basis, and the completion of all required maintenance, repair, and the replacement work performed on them. The Heating System Coordinator or Inspector shall submit purchase requisitions for service work that require to be carried out by contractors from outside the BHA to the Building System Maintenance Director for approval.

Manager/Maintenance Superintendent Responsibilities:

The Manager/Maintenance Superintendent shall inspect the central heating plant or the boiler room on at least a weekly basis as part of the Building and Grounds Inspection. The Manager/Maintenance Superintendent shall observe heating plant and boiler room for performance of Fireman's areas for cleanliness and proper lighting. At this time, the Manager/Maintenance Superintendent shall enter in the Boiler Room logbook an entry indicating his or her reason for being in the boiler room. Each heating plant or boiler room must have a boiler room log book.

The Manager/Maintenance Superintendent shall inspect the distribution piping, fittings, and valves in the building basement for any sign of leaks or malfunctions. All deficiencies found during any inspection shall be reported to the Heating Systems Coordinator and/or transferred to work orders for correction as either emergency or Building and Grounds priorities

**Quarterly**

Manager/Maintenance Superintendent Responsibilities:

To conduct a formal inspection of the heating plant and boiler room during the quarterly Building and Grounds Inspections. The Manager /Maintenance Superintendent shall inspect all areas for cleanliness and proper lighting. The Manager /Maintenance Superintendent shall inspect distribution piping, fittings, and valves in the building basement for any sign of leaks or malfunctions. Check components for rust/corrosion. All deficiencies found during any inspection shall be reported to the Heating Systems Coordinator and/or transferred to work orders for correction as either emergency or Building and Grounds priorities

At this time, the Manager/Maintenance Superintendent shall enter in the Boiler Room logbook an entry indicating his or her reason for being in the boiler room.

**Annually**

Heating Systems Coordinator/Inspector Responsibilities:

Each year the Heating Systems Coordinator shall schedule boiler cleanings and arrange for jurisdictional inspections at all developments. These boiler cleanings shall include all the work listed on the "Boiler Cleaning and State Mandated Inspection Scope of Services" attached. All cleanings and inspections shall take place between the period of June 15 and September 15 of each year. The Heating System Coordinator or Inspector shall submit purchase requisitions for annual services and cleaning out some of the boilers/heaters and components that require to be carried out by factory-trained technicians to the Building System Maintenance Director for approval.

Each year, the Heating Systems Coordinator shall arrange for the Burner Technicians to service and perform general preventive maintenance on all central heating plants' boilers and related major components such as boiler feed pumps, feed valves, ID fans, and controls. This service shall be performed in compliance with the "Burner Service Scope of Services" attached. All service shall be completed each year between June 15 and September 15. The Heating System Coordinator or Inspector shall submit purchase requisitions for obtaining the new complete components or replacement kits if the replacement of the components or kits is needed to the Building System Maintenance Director for approval.

The Heating Systems Coordinator and Inspector shall develop a list of summer maintenance and replacement projects for the central heating plants or decentralized boiler rooms, the distribution system components, and the controls. They shall arrange to purchase appropriate stock, plan and schedule the work to be performed by the fireman, burner technician, the steamfitter and electrician. The Heating Systems Coordinator and Inspector shall work with the Manager or Maintenance Superintendent to coordinate all such projects, including system shut-down and apartment access for apartment work etc.

**As needed**

Heating Systems Coordinator/Inspector Responsibilities:

The Heating Systems Coordinator and Inspector shall report all repairs required in the boiler rooms or central heating plants such as plumbing and sewer leaks, lighting, access, alarm systems etc.; and the leaks on the distribution system in the basement space to the Maintenance Superintendent, as needed, especially repairs requiring assistance from BHA trade persons.

The Heating Systems Coordinator and Inspector shall document and relay the information to the Manager or Maintenance Superintendent regarding all the work performed on the heating systems by the steamfitter and electrician so it can be recorded on the development work order system.

Manager Responsibilities

The Manager shall work with the Maintenance Superintendent and the Heating System Coordinator and Inspector as needed to insure that maintenance is performed and repairs are made to the heating system including the heating plant/boiler room, distribution system, controls, and heating fixtures inside the unit. The Manager shall make all decisions concerning major repairs to heating distribution systems in the basement, underground, and inside the residential units. The Manager shall approve all purchase orders for stock, repair or replacement work, and annual preventive maintenance service as listed above.

The Manager has overall responsibilities for insuring that all heating plant and boiler rooms maintenance and repair is completed properly and on time to insure service delivery to residents.

The Manager with the assistance of the Heating Systems Coordinator and Inspector shall work with the Project Manager or Architect to determine priorities of the needed heating systems improvements, select designers, develop designs and manage construction contracts for all major repair and replacement of heating systems and components.

### 8.2.3 System Inventory Information:

The Development Heating System Inventory & Specification sheet shall contain detailed specifications of all boilers, burners, controls, major components and controls on the distribution piping, heating fixture and controls inside the unit, and auxiliary equipment and instrument including major spare parts and shall be maintained in the Building Systems Inventory Book and updated as needed. The Inventory shall also include all daily, weekly, monthly, and annual service checklist forms specific to the equipment & instrument at the site. The inventory will also include location information and a site map can be used to supplement this.

Central Heating Plant and Decentralized Heating Boiler Room Information Sheets shall be provided by the Heating Maintenance Unit for all Family Developments and can be found in the S: FamEld Drive, *SOP Profile and Building Systems by Development* folder. This folder is organized into sub-folders for each development. Each Development sub-folder is further divided into folders for each system/component/structure subject to preventive maintenance. The Heating systems information sheets, specific to the systems located at your Development can be obtained from the Heating sub-folder within your Development folder.

See S: FamEld Drive, *SOP Master Building Systems Appendices* for sample master Central Heating Plant and Decentralized Heating Boiler Room inventory, specification and checklists forms if the Heating Maintenance Unit does not have this information for the heating system at your Development

### 8.2.4 Service Records

Development Records:
The Fireman's Daily Checklist shall be submitted weekly to the Manager or Maintenance Superintendent and the original maintained in the Service Record Book, or in separate file folders in chronological order.

The central plants and boiler rooms' logbooks shall be submitted annually to the Manager or Maintenance Superintendent and maintained in the development management office.

The fuel oil delivery slips shall be submitted weekly by the fireman to the Manager or Maintenance Superintendent. These slips must be forwarded to the Accounts Payable Department in a timely manner [Refer to section 30.13]

*The Heating System Inspector's weekly Inspection and Service Report* will be submitted to the Heating System Coordinator and copied to the development Manager for filing in the Service Records Book.

Records of all preventive maintenance (P) work orders completed by the steam fitter, plumber, and electrician shall be filed in the annual Service Record Binder as well as the work order system files. Records of all preventive maintenance purchase orders shall be filed in the annual Service Record Binder as well as the purchase order system files

All preventive maintenance activities must be included and tracked on your Annual Preventive Maintenance Plan – Schedule and Report form See S: FamEld Drive, SOP Master Building Systems Appendices for sample Annual PM Plan – Schedule and Report Form.

Heating Department Records
All records of service and repairs performed including annual boiler cleanings and preventive maintenance service as well as other contracted repairs shall be maintained in the Heating Dept. by the Heating System Coordinator and Inspector. Copies shall be maintained in the Service Record Binder.

All records of service and repairs performed including annual boiler cleanings and preventive maintenance by BHA Firemen and/or Burner Technicians shall be maintained in the Heating Dept. by the Heating System Coordinator and Inspector. Copies shall be maintained in the Service Record Binder.

## 8.3 Boiler Cleaning and Jurisdictional Inspection

Boiler cleanings shall be performed annually by qualified contractors or development Firemen and Burner Technicians in accordance with the scope of services listed below. Following the cleaning, and prior to closing the boiler, the Heating Systems Coordinator and Inspector shall arrange for an insurance inspection for the boilers that are subject to annual state inspection according to state code and regulations. The following scope of services shall be adhered to:

**Prior to Calling Insurance Company's Boiler Inspector:**

1. All firesides are to be properly brushed and vacuumed. This includes tubes in the fire tube boilers and gas passes in cast iron sectional boilers.
2. All fireboxes are to be cleaned and vacuumed.
3. All hand hole plates and manhole covers are to be removed and surface cleaned.
4. All controls and plugs are to be opened and flushed out.
5. The area around the boiler including the boiler itself (top, etc.) is to be cleaned and free of soot.

**Prior to and During the Inspection:**

1. Water shall be drawn off and the waterside thoroughly washed out.

2. Manhole and hand hole plates, washout plugs, as well as inspection plugs in water column connections shall be removed as required by the inspector. The furnace and combustion chambers shall be cooled and thoroughly cleaned.
3. Insulation and brickwork shall be removed if required by the inspector in order to determine the condition of the boiler, headers, furnace, supports or other parts.
4. The pressure gauge shall be removed for testing if required by the Inspector.
5. Any leakage of steam or hot water into the boiler shall be prevented by disconnecting the pipe or valve at the most convenient point or at any appropriate means approved by the inspector.
6. Before opening the manhole or manholes and entering any part of a boiler that is connected to a common header with any other boilers, the required steam or water system valves or cocks between the two closed stop valves opened. The feed valves must be closed, tagged and preferably padlocked, and drain valves or cocks between the two valves opened. After draining the boiler, the blow-off valves shall be closed, tagged, and preferably padlocked. Blow-off lines, where practicable, shall be disconnected between pressure parts and valves. All drains and vent lines shall be opened.

**After the Inspection:**

- The original Boiler Inspection Certificates when issued shall be maintained at BHA Heating Dept., one copy set shall be displayed in the boiler plant or boiler room, and another set shall be kept in file by the development management.
- If the boiler fails to pass the inspection, the Heating Systems Coordinator/Inspector and the development staff shall work together to identify the reason for failure on the inspection, address the deficiencies if any, and arrange re-inspections if needed until the Boiler Inspection Certificate is obtained.
- Heating Systems Coordinator/Inspector shall inform the BHA Risk Management the inspection problem and result whenever it becomes available.

## 8.4 Annual Preventive Maintenance and Start up Services – Gas Fired Boiler Systems

For gas-fired boiler systems, a qualified service contractor or qualified BHA service personnel shall perform annual preventive maintenance and start up services in accordance with the scope of services listed below.

**Scope of Services**

1. Report upon arrival to BHA Representative when required.
2. Inspect and report on conditions of refractory, exhaust hood, and heat exchangers if applied.
3. Drain and recharge expansion tanks for hydronic heating system.
4. Inspect all boiler controls and safeties on individual boiler and on the common header. Inspect the combustion air in-take fan and/or exhaust louver opening for proper operation.
5. Inspect ignition assembly replace electrode if needed, inspect pilot thermocouples, scanner, and replace them if needed.
6. Tighten electrical connections to individual controls, pump, valve, and inside the control panel.
7. Open and clean boiler pump's controller, low water cutoffs, and automatic feeder if applied.
8. Test all boilers, inspect the gas trains and adjust gas manifold pressure, and adjust fuel-air ratio and check sequences of operations. Check the exhaust damper opening and draft inducer operation if applied.
9. Test the prove function of pilot status, limits, flow switches, combustion air intake and/or exhaust louver opening, and operating controls.
10. Adjust and calibrate indoor/outdoor temperature settings and burner sequencing control.
11. Remove gas manifold and gas header.
12. Remove pilot assemblies and burners.
13. Clean gas train orifice opening, pilot assemblies, and burners.
14. Reassemble burner and gas manifolds (replace burner gaskets).

15. Perform efficiency tests on each boiler and provide a written test report to BHA and tag system with test results.
16. Submit report to BHA on boiler condition and suggest the needed repairs as required.

## 8.5 Annual Preventive Maintenance and Start up Services – Oil Fired Boiler Systems

Annual preventive maintenance and start up services shall be performed on all oil-fired boiler systems by a qualified service contractor or BHA Fireman and Burner Technician in accordance with the scope of services listed below. This service shall be performed by September 15 of each year.

**Scope of Services**

1. Report in with BHA representative
2. Record and report abnormal conditions, measurements taken etc.
3. Inspect all burner linkages for proper installation and/or damage
4. Test primary and secondary shut off dampers for tight seal.
5. Inspect linkages for ease of operation and lubricate as required.
6. Verify operation of primary and secondary air dampers and inspect for cleanliness

<u>High and Low Pressure Air Atomizing Oil Burner Only</u>
1. Remove and replace nozzles
2. Inspect condition of, and replace the air filter element
3. Inspect installation of mounting points and tighten all major points

<u>Atomizing Supply Air Compressor</u>
1. Lubricate motor bearings
2. Lubricate compressor bearings
3. Inspect pull grooves and belts for alignment, wear and tension, and replace belt (s)
4. Verify operation of air compressor
5. Inspect and correct for unusual noises, vibrations, odors, etc
6. Inspect motor windings for dirt buildup and clean
7. Inspect starter for signs of wear, overheating, arcing, burns, etc.
8. Lubricate coupling
9. Visually inspect coupling for abnormal conditions
10. Change oil and oil filter
11. Change air filter

<u>Rotary Cup Oil Burner (only)</u>
1. Clean, inspect and lubricate all mechanical linkages and couplings
2. Lubricate all bearings and gears
3. Clean atomizing cup

<u>Mechanical Atomizing Oil Burner (Only)</u>
1. Remove, clean and inspect nozzles

<u>Force or Induced Draft Blower</u>
2. Inspection condition of and clean blowers and air passages
3. Inspect installation of mounting points and tighten all major points
4. Visually inspect coupling for abnormal conditions
5. Lubricate coupling
6. Inspect motor windings for dirt build up.
7. Lubricate motor bearings
8. Inspect for unusual noises, vibrations, odors etc.

9. Lubricate blower bearings
10. Inspect pulley grooves and belts for alignment, wear and tension (replace belts)
11. Inspect starter for signs of wear, overheating, arching, burns, etc.

Fuel System and Oil Pumps

1. Inspect area around pump seals for seal leakage
2. Inspect installation of mounting points and tighten all major points
3. Inspect starter for signs of wear, overheating, arcing, burns, etc.
4. Verify operation and setting of oil pressure regulator
5. Replace cartridge type oil filter and gasket if necessary
6. Inspect for unusual noises, vibrations, odors, etc.
7. Lubricate pump bearings
8. Lubricate coupling
9. Inspect and Lubricate motors
10. Inspect motor windings for dirt build up
11. Visually inspect accessible fuel delivery system for leaks.

Pre-heater

1. Verify operation of oil pre-heater system
2. Verify accuracy of pre-heater pressure and temp gauges - replace if defective

Pilot

1. Leak test pilot gas train (soap test)* if applied
2. Inspect ignition assembly replace electrode and ignition wiring including raja clips
3. Inspect pilot orifice and clean
4. Inspect and set spark gap

Flame safeguard

1. Clean flame detectors
2. Test flame detention device
3. Test minimum pilot test
4. Test pilot flame failure protection
5. Test main flame failure protection
6. Perform combustion test and adjust air mixture as necessary ($CO_2$ Test)
7. Test for detection with hot combustion chamber

Operational Test

1. Test low oil pressure safety circuit
2. Test low oil temperature safety circuit
3. Verify operation of operating controls
4. Inspect flame condition
5. Test atomizing air pressure supervisory switch
6. Test all special safety devices
7. Verify operation of high operating limit controls

## 8.6 Centralized Domestic Hot Water Systems

### 8.6.1 Objective:

To insure the continuous operation of the centralized domestic hot water heating system, for proper delivery of service to the residents according to state plumbing and sanitary codes.

### 8.6.2 Scheduled Activities

**Daily**
Fireman Responsibilities:
The Fireman is responsible for performing daily inspections and service of the domestic hot water system. The Fireman shall maintain in the daily log of boiler room activities, including the temperature of the heated water stored in the tanks and at the outlet of the tempering valve if available, or the water temperature just coming out of the instantaneous hot water heaters when applied. The Fireman shall inspect the heating (either steam or heating hot water) control valve, city water feed, and domestic hot water re-circulating pump for proper operation. The Fireman shall visual inspect any sign of leaks around the system and report any deficiency to Heating the Manager and System Coordinator/Inspector. This daily checklist as part of the heating system shall be submitted weekly to the Manager and the Heating Dept. accordingly.

**Weekly**
Fireman Responsibilities
Oil Fired developments during off-heating season: to insure the continued operation of the central heating system, weekly, the Fireman shall dip the oil tank and take a reading. The Fireman shall log this reading to the boiler plant logbook and copy it to Maintenance Superintendent who will order oil as needed. The Fireman or Maintenance Superintendent shall be responsible for obtaining delivery slips from the deliverer and giving them to the Manager for immediate submission to the Accounts Payable Coordinator. Please note: during the heating season, tank should be checked daily or at more frequent intervals. Oil may be ordered any working day.

Manager Responsibilities
The Manager shall inspect the boiler room on at least at weekly basis as part of the Building and Grounds Inspection. Manager shall observe boiler room for performance of Fireman's areas for cleanliness and proper lighting, as well as check the daily log for entries on DHW temperature readings. At this time, the Manager should log an entry in the Boiler Room logbook of their visit.

**As needed**
Fireman Responsibilities
The Fireman shall immediately report any problems to the Manager and/or Maintenance Superintendent, and the Heating Systems Coordinator/Inspector. In the event of very urgent or emergency problems, and the unavailability of the development staff, the Fireman shall report the problems directly to the ERS; the ERS staff or the dispatcher who answers the call after regulator hours will relay the message to the BHA Duty Officer.

Manager Responsibilities
The Manager shall inspect the distribution piping, fittings, and valves in the building basement for any sign of leaks or malfunctions.

The Manager shall work with the Heating System Coordinator and Inspector as needed to insure that maintenance is performed and repairs are made to the domestic hot system including the hot water storage tanks or instantaneous hot water heaters, heating coils, control valves, tempering valves, and the re-circulating pump etc.

The Manager shall work with the Maintenance Superintendent to insure that the storage tanks are drained and cleaned in summer, the maintenance is performed and repairs are made to the distribution piping and

controls, and plumbing fixtures such as mixing valves inside the unit. The Manager shall make all decisions concerning major repairs to the domestic hot water distribution systems in the basement, underground, and inside the residential units. The Manager shall approve all purchase orders for stock, repair or replacement work, and annual preventive maintenance service as listed above.

The Manager has overall responsibilities for insuring that all the domestic hot water system maintenance and repair is completed properly and on time to insure service delivery to residents.

The Manager, with the assistance of the Heating Systems Coordinator and Inspector will work with the Project Manager or Architect to determine priorities of needed domestic hot water system improvements, select designers, develop designs and manage construction contracts for all major repair and replacement of domestic hot water systems and components.

### 8.6.3 Systems Inventory Information

The Development Centralized Domestic Hot Water Inventory & Specification sheet shall contain detailed specifications of the system's components including spare parts and shall be maintained in the Systems Inventory Book and updated as needed. The Inventory shall also include all daily; weekly, scheduled service checklist forms specific to the equipment & instrument at the site.

Centralized Domestic Hot Water Information Sheets shall be provided by the Heating Maintenance Unit for Family Developments and can be found in the S: FamEld Drive, *SOP Profile and Building Systems by Development* folder. This folder is organized into sub-folders for each development. Each Development sub-folder is further divided into folders for each system/component/structure subject to preventive maintenance. The Centralized Domestic Hot Water information sheets, specific to the systems located at your Development can be obtained from the Heating sub-folder within your Development folder.

See S: FamEld Drive, SOP Master Building Systems Appendices for sample master Centralized Domestic Hot Water inventory, specification and checklists forms if the Heating Maintenance Unit does not have this information specific to your Development

### 8.6.4 Service Records

Copies of all records of all Centralized Domestic Hot Water Systems preventive maintenance activities including all inspection checklists, services, regular testing and repairs etc will be filed in the annual Service Record Binder in the Heating Section.

Records of all preventive maintenance (P) work shall be filed in the annual Service Record Binder as well as the work order system files. Records of all preventive maintenance purchase orders shall be filed in the annual Service Record Binder as well as the purchase order system files.

All preventive maintenance activities must be included and tracked on your Annual Preventive Maintenance Plan – Schedule and Report form See S: FamEld Drive, SOP Master Building Systems Appendices for sample Annual PM Plan – Schedule and Report Form.

## 8.7 Electrically-Heated Developments

### 8.7.1 Objective

To supply resident with adequate heat and insure that parts and supplies are on hand to repair electric heating in the event of failure.

### 8.7.2 Scheduled Activities

**Monthly/As Needed**

Manager/Maintenance Superintendent Responsibilities

The Manager/Maintenance Superintendent is responsible for insuring that all electric heating components are in stock at all times. In particular, Managers should insure that the development is well stocked prior to the start of each heating season (September 15 of each year). Components include electric heat elements for baseboards (various sizes) and line voltage thermostats.

**Annually**

Manager's Responsibilities:

During the course of Living Unit Inspections, check all thermostats and heating units to insure that they are working properly. It will not be possible to check heating units for operation on hot days; however, this procedure should be followed on any day that the temperature allows. Heating units with broken or missing covers can create a fire hazard and should be replaced or repaired immediately.

### 8.7.3 Systems Inventory Information

An Electrical Heating Inventory and Specification sheet, including location and replacement/spare part information, shall be maintained in the Systems Inventory Book and updated as needed.
Specification sheets should include all sizes and types of electric baseboard units with notations as to where each size/type is used (i.e. room of apartment). A site plan may be used to supplement this information and will be maintained in the Systems Inventory book. The Inventory shall also include all scheduled service checklist forms specific to the equipment at the site, as applicable. See S: FamEld Drive, SOP Master Building Systems Appendices for sample master Electrical Heating inventory, specification and checklists forms.

### 8.7.4 Service Records

Copies of all records of all Electrical Heating systems preventive maintenance activities including all inspection checklists, services, repairs etc will be filed in the annual Service Record Binder in the Heating Systems Section. Records of all preventive maintenance (P) work orders shall be filed in the annual Service Record Binder as well as the work order system files. Records of all preventive maintenance purchase orders shall be filed in the annual Service Record Binder as well as the purchase order system files.

All preventive maintenance activities must be included and tracked on your Annual Preventive Maintenance Plan – Schedule and Report form See S: FamEld Drive, SOP Master Building Systems Appendices for sample Annual PM Plan – Schedule and Report Form.

## 8.8 Fan Coil Unit inventory and Maintenance

### 8.8.1 Objective

To maintain all fan coil units in good working condition.

### 8.8.2 Scheduled Activities

**Annually**

Maintenance Superintendent/Manager/Electrician Responsibilities:

On an annual basis, during the off-heating season between May 15 and September 15, the in-house electrician shall check each fan coil unit following the procedure described below. It is the manager/maintenance superintendent's responsibility to schedule this work. Additionally, the filters shall be changed at this time.

**Maintenance Procedure:**

- Inspect the unit for any signs of leaking and unusual odors
- Remove return grille and replace filter
- Clean grille if required
- Inspect the fan and clean
- Inspect the drain pan and clean.
- Check the condensate drain line to insure it is open and clear.

In elderly buildings changing filters may be assigned to the resident custodian. At this time he/she will check the general operation of the system, and if the motor is malfunctioning, the Electrician shall repair or replace as needed.

### 8.8.3 Systems Inventory Information

The Fan Coil Unit Inventory & Specification sheet shall contain detailed specifications of all units including replacement part information as necessary and shall be maintained in the Systems Inventory Book and updated as needed. The Inventory shall also include all scheduled service checklist forms specific to the equipment at the site, as applicable. The inventory will also include location information and a site map can be used to supplement this.

For Family Developments - Fan Coil Unit Information Sheets shall be provided by the Heating Maintenance Unit and can be found in the S: FamEld Drive, *SOP Profile and Building Systems by Development* folder. This folder is organized into sub-folders for each development. Each Development sub-folder is further divided into folders for each system/component/structure subject to preventive maintenance. The Fan Coil Unit Information Sheets, specific to the systems located at your Development can be obtained from the Heating sub-folder within your Development folder.

Elderly developments with fan coil units (Bellflower and Roslyn) need similar information. A hard copy should be kept in the Systems Inventory Binder. See S: FamEld Drive, SOP Master Building Systems Appendices for sample master Fan Coil Unit inventory, specification and checklists forms

### 8.8.4 Service Records

Copies of all records of all Fan Coil Units preventive maintenance activities including all inspection checklists, services, repairs etc will be filed in the annual Service Record Binder in the Heating Systems Section. Records of all preventive maintenance (P) work orders shall be filed in the annual Service Record Binder as well as the work order system files. Records of all preventive maintenance purchase orders shall be filed in the annual Service Record Binder as well as the purchase order system files.

All preventive maintenance activities must be included and tracked on your Annual Preventive Maintenance Plan – Schedule and Report form See S: FamEld Drive, SOP Master Building Systems Appendices for sample Annual PM Plan – Schedule and Report Form.

## 8.9 Condensate Return Pumps

### 8.9.1 Objective

To insure the continuous operation of all condensate return pumps through regular inspection and service, thereby insuring appropriate heat circulation, minimization of loss of energy and save water.

### 8.9.2 Scheduled Activities

**Weekly**
Steam fitter Responsibilities:
During the heating season, the Steamfitter shall complete a weekly inspection of all condensate return pumps using the Condensate Return Pump checklist. Any failure of a pump shall be immediately reported to the Maintenance Superintendent and work orders issued as appropriate to make all necessary repairs.

Each weekly inspection shall include:

1. Checking that the control (float switch) is in the automatic position
2. Watching the unit run through at least one complete cycle to check for proper operation
3. Checking for steam or water leaks, unusual odors or sounds.

**Monthly**
Maintenance Superintendent Responsibilities:
The Maintenance Superintendent shall accompany the Steamfitter on inspections at least once per month and note any problems during their walk-through to be addressed as part of routine maintenance or preventive maintenance.

### 8.9.3 Systems Inventory Information

The Condensate Return Pumps Inventory & Specification sheet shall contain detailed specifications of all units including replacement part information as necessary and shall be maintained in the Systems Inventory Book and updated as needed. The Inventory shall also include all scheduled service checklist forms specific to the equipment at the site, as applicable. The inventory will also include location information and a site map can be used to supplement this. See S: FamEld Drive, SOP Master Building Systems Appendices for sample master Condensate Return Pumps inventory, specification and checklists forms.

### 8.9.4 Service Records

Copies of all records of all Condensate Return Pumps preventive maintenance activities including all inspection checklists, services, repairs etc will be filed in the annual Service Record Binder in the Heating Systems Section. Records of all preventive maintenance (P) work orders shall be filed in the annual Service Record Binder as well as the work order system files. Records of all preventive maintenance purchase orders shall be filed in the annual Service Record Binder as well as the purchase order system files.

All preventive maintenance activities must be included and tracked on your Annual Preventive Maintenance Plan – Schedule and Report form See S: FamEld Drive, SOP Master Building Systems Appendices for sample Annual PM Plan – Schedule and Report Form.

## 8.10 Steam Trap Cyclical Replacement Program

### 8.10.1 Objective

To replace every steam trap on a five-year cycle during the off-heating season to insure the efficient and quite delivery of steam heat. Steam traps have a useful life of no more than 8 years, but usually less. This program is intended to replace traps prior to failure.

### 8.10.2 Scheduled Activities

**One Time**

Manager/Maintenance Superintendent Responsibilities:
As a start up activity, where this does not exist[1], each Manager/Maintenance Superintendent shall supervise the Steamfitter in the completion of a steam trap survey covering the entire development. The Manager/Maintenance Superintendent shall request the assistance of the Heating Systems Coordinator or Inspector in carrying out this task if required.

The purpose of the survey shall be to compile information on the number, size, type, and location of all development steam traps. As a general matter, in most developments, apartment steam traps are located at each heating unit and a survey of a representative sample of traps will be sufficient. All basements, boiler rooms, and other common area spaces will have to be specifically surveyed to identify each steam trap separately.

Following the survey, the Manager/Maintenance Superintendent shall develop a schedule for replacement of 20% of all steam traps each year. In general, this replacement program will begin in the common areas of the development, as the largest steam traps will be found in these spaces. However, if these have been recently replaced, the Manager/Maintenance Superintendent may decide to start in apartments.

The schedule shall reflect replacement of all steam traps in a five-year period starting with common areas steam traps in year one and one quarter of all apartments in year 2, 3, 4 and 5. . Once one cycle has been completed, the cycle will begin again.

**Annually**

Manager/Maintenance Superintendent Responsibilities:
Each year the Manager shall order adequate steam traps for the replacement cycle that will occur over that summer. Since some traps will be rebuilt each year, the Manager will determine the number of new traps which need to be purchased based on the stock of rebuilt traps available. For the first year, all traps will have to be purchased.

The Maintenance Superintendent shall develop a daily schedule of work to replace steam traps during the summer months. Work may begin prior to June 15 on warm days when the heating plant can be shut down. Work orders shall be created on a daily basis, using the priority code "P" to account for the steam fitters time.

The Manager shall coordinate the activity in apartments through notices to residents of the work being performed and 48-hour notices to enter.

**Steam fitter Responsibilities:**
The Steamfitter shall systematically replace all steam traps as scheduled. Old steam traps shall be removed and stored in an appropriate maintenance shop area for refitting during winter months. These refitted traps shall be used as spares and for the next annual cycle of steam trap replacement.

### 8.10.3 Systems Inventory Information

The Steam Trap Inventory & Specification sheet must include information on type; size of all traps with summary information for apartments as well as replacement part information and shall be maintained in the Systems Inventory Book and updated as needed. The Inventory shall also include all checklists for replacement dates and this information updated as work is completed. See S: FamEld Drive, SOP Master Building Systems Appendices for sample master Steam Trap inventory, specification and checklists forms. A schedule for regular replacement of traps on a five-year cycle shall be included.

[1] This program began in 1999 and this work should be complete.

### 8.10.4 Service Records

Copies of all records of all Steam Trap preventive maintenance activities will be filed in the annual Service Record Binder in the Heating System Section. Each year, upon replacement of traps, the appropriate columns of the sheets shall be completed and included in Service Record Binder.

Records of all preventive maintenance (P) work orders [e.g. for all interim replacement of traps] shall be filed in the annual Service Record Binder as well as the work order system files. Records of all preventive maintenance purchase orders shall be filed in the annual Service Record Binder as well as the purchase order system files.

Finally notations of all interim replacement of traps shall be included on the Interim Trap Replacement log for reference when performing cyclical replacement activities so as not to duplicate work unnecessarily.

All preventive maintenance activities must be included and tracked on your Annual Preventive Maintenance Plan – Schedule and Report form See S: FamEld Drive, SOP Master Building Systems Appendices for sample Annual PM Plan – Schedule and Report Form.

## 8.11 System Temperature Controls Measures & Maintenance

### 8.11.1 Objective:

To insure continued, efficient, and reliable operation of a heating system, by maintaining functional temperature controls on boiler sequence controls, heating loop control valves, heating zone valves inside the building, self-contained control valve or manual inlet valve on heating fixture inside the apartment, and unit thermostat properly at all times.

### 8.11.2 Scheduled Activities

**Twice Yearly**

Manager/Maintenance Superintendent Responsibilities:

The development Manager and Maintenance Superintendent is responsible for the proper operation of heating zone valves inside the building, self-contained control valve or manual inlet valve on heating fixture inside the apartment, and unit thermostat.

Twice annually, in June and November, the Superintendent shall coordinate to have the zone valves inspected and serviced as necessary by BHA Mechanic or qualified contractor. Additionally, the Superintendent shall have at least one extra zone valve for each type/size on site, in case of an emergency replacement is needed.

Steam fitter/Contractor Responsibilities:

During the scheduled inspection and service period, the Steamfitter or contractor shall perform all necessary general maintenance to the zone valves including, but not limited to: inspecting valves for any visual defects and foreign objects, lubricating the valves, manually operating the valves (if applicable), "jumping" the connections to check the operation of the valves (if applicable). Any valve that is found to be defective must be replaced at this time.

**As Needed**

Heating Systems Coordinator/Inspector Responsibilities:

BHA Heating Dept. is responsible for the proper operation of boiler sequence controls and/or pump controls, and heating loop control valves inside the central boiler plant or boiler room.

The Heating System Coordinator & Inspector shall check the boiler controls and heating loop control valves during their regular boiler plant inspection for proper operation. Have the Burner Technicians check the outside temperature air sensors and replace them when needed, and fine-tune the boiler controls and set-points.

During their regular inspection, the Heating System Coordinator/Inspector shall visually inspect zone valves for operation and both external and internal leakage.

### 8.11.3 Systems Inventory Information

Systems Temperature Controls Inventory & Specification sheet must include information on all zone valves. Self-contained control valve or manual inlet on heating fixture inside the apartment, and unit thermostat as well as areas/locations and replacement part information and shall be maintained in the Systems Inventory Book and updated as needed. The Inventory shall also include all scheduled service checklist forms specific to the equipment at the site, as applicable. A site map can be used to supplement the location information if necessary. See S: FamEld Drive, SOP Master Building Systems Appendices for sample master Systems Temperature Controls inventory, specification and checklists forms

### 8.11.4 Service Records

Copies of all records of all system temperature controls preventive maintenance activities including all inspection checklists, services, repairs etc will be filed in the annual Service Record Binder in the Heating Systems Section. Records of all preventive maintenance (P) work orders shall be filed in the annual Service Record Binder as well as the work order system files. Records of all preventive maintenance purchase orders shall be filed in the annual Service Record Binder as well as the purchase order system files.

All preventive maintenance activities must be included and tracked on your Annual Preventive Maintenance Plan – Schedule and Report form See S: FamEld Drive, SOP Master Building Systems Appendices for sample Annual PM Plan – Schedule and Report Form.

## 8.12 Forced Warm Air and Heat Pumps System & Maintenance/52 Chauncy Street

### 8.12.1 Objective

To insure the continued efficient operation of the 52 Chauncy Street heating system, by insuring that all temperature controls are functioning properly at all times.

### 8.12.2 Scheduled Activities

**Twice Annually**

Maintenance Superintendent/Building Manager Responsibilities:

Twice annually, in June and November, the Superintendent shall coordinate to have the zone valves inspected and serviced as necessary by a BHA Mechanic or qualified contractor. Additionally, the Superintendent shall have at least one extra zone valve on site, in case of an emergency replacement is needed.

Steam fitter/Contractor Responsibilities:

During the scheduled inspection and service period, the Steam fitter or contractor shall perform all necessary general maintenance to the zone valves including, but not limited to: inspecting valves for any visual defects and foreign objects, lubricating the valves, manually operating the valves (if applicable), "jumping" the

connections to check the operation of the valves (if applicable). Any valve that is found to be defective must be replaced at this time.

**As needed**
Heating Systems Coordinator/Inspector Responsibilities:
During the walk through, the Heating System Coordinator/Inspector shall visually inspect zone valves, and shall check the service loose-leaf binder to insure that the necessary work has been completed.

### 8.12.3 Systems Inventory Information

Forced Warm Air and Heat Pumps Systems Inventory & Specification sheet must include information on all zone valves, including location and replacement part information and shall be maintained in the systems Inventory Book and updated as needed. The Inventory shall also include all scheduled service checklist forms specific to the equipment at the site, as applicable. A site map can be used to supplement the location information if necessary. See S: FamEld Drive, SOP Master Building Systems Appendices for sample master Forced Warm Air and Heat Pumps Systems inventory, specification and checklists forms

### 8.12.4 Service Records

Copies of all records of all Forced Warm Air and Heat Pumps preventive maintenance activities including all inspection checklists, services, repairs etc will be filed in the annual Service Record Binder in the Heating Systems Section. Records of all preventive maintenance (P) work orders shall be filed in the annual Service Record Binder as well as the work order system files. Records of all preventive maintenance purchase orders shall be filed in the annual Service Record Binder as well as the purchase order system files.

All preventive maintenance activities must be included and tracked on your Annual Preventive Maintenance Plan – Schedule and Report form See S: FamEld Drive, SOP Master Building Systems Appendices for sample Annual PM Plan – Schedule and Report Form.

## 8.13 Fuel Oil Consumption and Ordering Policy

### 8.13.1 Objective

To insure the continued efficient operation of an oil-fired heating system, by insuring consistent delivery of heating oil, monitoring fuel consumption, and providing reliable heat and/or hot water to residents.

### 8.13.2 Scheduled Activities:

**Daily**
Firemen Responsibilities:
During heating season [September 15th – May 15th], each morning, the Fireman must dip the oil tank and take a reading and record in boiler room logbook. During off-heating season [May 16th – September 14th]; the Fireman must dip the oil tank and take a reading and record in boiler room logbook at least once a week. The Fireman shall call this reading to the Maintenance Superintendent who will order oil as needed. Prior to and after receiving an oil delivery, the Fireman must dip the tank to insure that the appropriate amount of oil requested was delivered, and to minimize the potential hazard of any oil spillage due to over filling of an oil tank.

Fireman shall monitor the fuel oil circulating pumps for proper operation and visual inspect the fuel oil pumps, filters/strainers, and burners for any sign of leakage and respond to it properly.

Fireman is responsible to monitor the fuel oil consumption and report to the Heating System Coordinator or Inspector immediately for any drastic volume change in the storage tanks.

**Weekly**

Fireman Responsibilities

Fireman shall alternate the fuel oil circulating pumps and strainers/filters once a week and clean the strainers/filter elements immediately ready for use again.

**As Needed**

Firemen/Maintenance Superintendent Responsibilities:

The Fireman or Maintenance Superintendent shall be responsible for obtaining delivery slips from the deliverer and giving them to the Manager for immediate submission to the Accounts Payable Department. Oil may be ordered any working day.

Manager Responsibilities:

As oil delivery slips/receipts are provided, and each month, as the oil usage forms are submitted, the Manager must review these forms and submit them in a timely manner to the appropriate departments for processing.

### 8.13.3 Systems Inventory Information

Oil Fire Heating Systems Inventory & Specification sheet, including information on fuel type [oil must be specified as #2, #4 or #6] location and replacement part information shall be maintained in the systems Inventory Book and updated as needed. The Inventory shall also include all scheduled service checklist forms specific to the equipment at the site, as applicable. A site map can be used to supplement the location information if necessary. See S: FamEld Drive, SOP Master Building Systems Appendices for sample master Oil Fire Heating Systems inventory, specification and checklists forms.

### 8.13.4 Service Records

Copies of all records of oil-fired heating system preventive maintenance activities including all inspection checklists, services, repairs etc will be filed in the annual Service Record Binder in the Heating Systems Section. Records of all preventive maintenance (P) work orders shall be filed in the annual Service Record Binder as well as the work order system files. Records of all preventive maintenance purchase orders shall be filed in the annual Service Record Binder as well as the purchase order system files

All preventive maintenance activities must be included and tracked on your Annual Preventive Maintenance Plan – Schedule and Report form See S: FamEld Drive, SOP Master Building Systems Appendices for sample Annual PM Plan – Schedule and Report Form.

All copies of oil delivery slips/receipts shall be maintained in the development's purchasing filing system. All monthly oil usage forms shall be maintained in the Service Record binder, in chronological order.

# Chapter 9 Plumbing

## 9.1 Water Distribution System - Inspection and Service Procedures

### 9.1.1 Objective:

To insure that the plumbing distribution system is operating properly and is maintained in accordance with applicable ordinances and codes.

### 9.1.2 Scheduled Activities:

**Monthly**
Manager/Maintenance Superintendent Responsibilities:
Each month, the Manager/ Maintenance Superintendent shall conduct a general inspection of the plumbing distribution system. This inspection should include, but not be limited to: visual inspections for leaks, location of water shut-off valves, broken or missing valve handles.

**Annually**
Manager Responsibilities:
Each year during the living unit inspection cycle, the manager should observe the conditions of plumbing fixtures, caulking, grout, and any visual leaks that may be originating from another location. These conditions should be noted on the living unit inspection form and processed to issue work orders to be completed by the appropriate staff. Hot water temperature must be tested and recorded.

Plumber Responsibilities:
Each year, the Plumber shall conduct a test of all main valves to insure their operation. This should include all building main valves, as well as, all hot and cold riser valves. This test should include, but not be limited to lubricating the valve, operating the valve back 1/4 turn, and checking for leaks.

### 9.1.3 Systems Inventory Information:

Water Distribution System Inventory & Specification sheet, including information on all valves, their location and replacement parts shall be maintained in the Systems Inventory Book and updated as needed.
The Inventory shall also include all scheduled service checklist forms specific to the equipment at the site, as applicable. The Maintenance Superintendent shall coordinate with the Plumber and steam fitter tagging of all valves. Once all valves have been identified and tagged the inventory and PM maintenance checklist shall be completed with the tag number all the valves, and a description of the valves. A site map can be used to supplement the location information if necessary. See S: FamEld Drive, SOP Master Building Systems Appendices for sample master Water Distribution system inventory, specification and checklists forms.

### 9.1.4 Service Records:

Copies of all records of Water Distribution system preventive maintenance activities including all inspection checklists, services, repairs etc shall be filed in the annual Service Record Binder in the Plumbing Section. Records of all preventive maintenance (P) work orders shall be filed in the annual Service Record Binder as well as the work order system files. Records of all preventive maintenance purchase orders shall be filed in the annual Service Record Binder as well as the purchase order system files

All preventive maintenance activities must be included and tracked on your Annual Preventive Maintenance Plan – Schedule and Report form See S: FamEld Drive, SOP Master Building Systems Appendices for sample Annual PM Plan – Schedule and Report Form.

## 9.2 Drain Cleaning

### 9.2.1 Objective:

To insure that main horizontal and roof drains flow adequately within dwelling buildings and out to the street. In addition, to insure adequate site drainage by insuring that all dry wells are clear and not clogged and that street storm water systems are not blocked.

### 9.2.2 Scheduled Activities:

**Annually**
Manager/Maintenance Superintendent Responsibilities:
Once a year, the Manager/Superintendent shall arrange for the plumber to open each basement clean out and check the flow of waste water. Any drains which are flowing slowly shall be routed out by machine (contractor or in-house).

**As needed/where needed**
Manager/Maintenance Superintendent Responsibilities:
The Manager/Superintendent shall maintain a list of problem drains and have them cleaned regularly to help prevent back ups. The frequency of each clean out schedule shall depend upon the nature and scope of the problem. For site drainage, the manager/super shall arrange to have clogged dry wells cleaned out in-house or by a contractor to insure that water does not pond on the site after rain storms. Any clogged street drain may be cleaned by laborers/JGs if the clog is on the surface or the City may be called. See Roofing, Chapter 33, for information on roof drains.

In-house Plumber Responsibilities:
In between scheduled cleaning of drains, if a problem arises, a work order shall be issued and an in-house plumber will service as needed by use of a drain machine.

### 9.2.3 Systems Inventory Information:

The Drain Inventory & Specification sheet must include information on all main-drains, storm lines and dry wells used for site drainage, including location information and shall be maintained in the Systems Inventory Book and updated as needed. A site map can be used to supplement the location information if applicable. The Inventory shall also include a master inspection and service checklist specific to the drains at the site and a list of those drains needing regular scheduled clean-outs. See S: FamEld Drive, SOP Master Building Systems Appendices for sample master Drain inventory, specification and checklists forms.

### 9.2.4 Service Records:

Copies of all records of all drain preventive maintenance activities including all inspection and service checklists, repairs etc will be filed in the annual Service Record Binder in the Plumbing Section. Records of all preventive maintenance (P) work orders shall be filed in the annual Service Record Binder as well as the work order system files. Records of all preventive maintenance purchase orders shall be filed in the annual Service Record Binder as well as the purchase order system files

All preventive maintenance activities must be included and tracked on your Annual Preventive Maintenance Plan – Schedule and Report form See S: FamEld Drive, SOP Master Building Systems Appendices for sample Annual PM Plan – Schedule and Report Form.

## 9.3 Back Flow Prevention

### 9.3.1 Objective:

To insure that the back flow device is operating properly and is maintained in accordance with applicable ordinances and codes.

### 9.3.2 Scheduled Activities:

**Annually**

Manager / Maintenance Superintendent Responsibilities:

The Manager/Maintenance Superintendent shall coordinate the annual inspection of back flow preventers by the Boston Water and Sewer Commission by being available on the scheduled inspection date to accompany the inspectors. Any deficiencies in the back flow preventer must be completed immediately. Managers are responsible for maintaining at least one repair kit on hand at all times in the event that one needs to be repaired on an emergency basis.

Boston Water and Sewer Responsibilities:

Annually, the Boston Water and Sewer Commission will perform a back flow inspection and submit a copy of the results to the manager.

### 9.3.3 Systems Inventory Information:

The Back Flow Device Inventory & Specification sheet must include information on all back flow preventers, including location information and the system to which they are related and shall be maintained in the Systems Inventory Book and updated as needed. A site map can be used to supplement the location information if applicable. The Inventory shall also include a master inspection and service checklist specific to the back flow devices at the site and a list of those drains needing regular scheduled clean-outs. See S: FamEld Drive, SOP Master Building Systems Appendices for sample master Back Flow device inventory, specification and checklists forms.

### 9.3.4 Service Records:

Copies of all records of all back flow device preventive maintenance activities including all inspection checklists, services, repairs etc will be filed in the annual Service Record Binder in the Plumbing Section. Records of all preventive maintenance (P) work orders shall be filed in the annual Service Record Binder as well as the work order system files. Records of all preventive maintenance purchase orders shall be filed in the annual Service Record Binder as well as the purchase order system files.

All preventive maintenance activities must be included and tracked on your Annual Preventive Maintenance Plan – Schedule and Report form See S: FamEld Drive, SOP Master Building Systems Appendices for sample Annual PM Plan – Schedule and Report Form.

## 9.4 Domestic Hot Water System

### 9.4.1 Objective:

To insure that the domestic hot water system is operating properly and is maintained in accordance with applicable ordinances and codes.

### 9.4.2 Scheduled Activities:

**Monthly**

Plumber Responsibilities:

Each month, the plumber shall perform a general inspection of the domestic hot water system and perform a discharge temperature check. The Plumber shall record its reading on the "Domestic Hot Water Chart" a master copy can be obtained in the S: FamEld Drive, SOP Master Building Systems Appendices. Any problems discovered at the time of the inspection must be corrected at that time.

**Annually**

Manager/Superintendent Responsibilities

Each year during the living unit inspection, the manager shall perform a hot water check in every unit and note the temperature on the living unit inspection form. Per Massachusetts Sanitary Code, water temperature must not be less than 110 degrees (F), and exceed no greater than 130 degrees (F).
On an annual basis, the Manager/Superintendent shall arrange to have a plumber drain and flush all DHW storage tanks including stand-alone DHW heaters.

**Every Three Years**

Manager/Superintendent Responsibilities

Once every three years, the superintendent shall arrange for the plumber to open and inspect any DHW heater/storage tank over 120 gallons.

**As needed**

Manager/Maintenance Superintendent Responsibilities:

If between scheduled DHW inspections, the system were to malfunction, the manager and/or maintenance superintendent shall issue a work order and/or purchase requisition to have the in-house plumber or contractor make the necessary repairs to the system. In the event that an in-house plumber is used, all required stock necessary to maintain the system should be kept on inventory.

### 9.4.3 Systems Inventory Information

The Domestic Hot Water System Inventory & Specification sheet must include information on all DHW Heaters, storage tanks and circulating pumps, including location information and shall be maintained in the Systems Inventory Book and updated as needed. A site map can be used to supplement the location information if applicable. The Inventory shall also include a master inspection and service checklist specific to the system at the site. See S: FamEld Drive, SOP Master Building Systems Appendices for sample master Domestic Hot Water System inventory, specification and checklists forms.

### 9.4.4 Service Records

Copies of all records of all Domestic Hot Water system preventive maintenance activities including all inspection/service checklists, repairs etc will be filed in the annual Service Record Binder in the Plumbing Section. Records of all preventive maintenance (P) work orders shall be filed in the annual Service Record Binder as well as the work order system files. Records of all preventive maintenance purchase orders shall be filed in the annual Service Record Binder as well as the purchase order system files. All preventive maintenance activities must be included and tracked on your Annual Preventive Maintenance Plan – Schedule and Report form.

# Chapter 10 Ventilation and Air Conditioning

## 10.1 Window Air Conditioning Units / BHA owned

### 10.1.1 Objective:

To insure the correct operation of all BHA owned window air conditioning units used to cool management, community and maintenance spaces during summer months.

### 10.1.2 Scheduled Activities:

**As Needed**
Managers/Maintenance Superintendents Responsibilities
Managers must keep spare filters on hand and respond to any problems with the units through purchase orders to contractors or issuance of work orders for repairs.

**Annually**
Maintenance Superintendent Responsibilities:
The Superintendent shall insure that the following tasks are complete each year by appropriate staff:

- During the month of May, each year, clean and/or change filter in the unit. For filters, which are washable, remove filter, wash thoroughly under a sink, dry, and replace in the unit. For units with disposable filters, remove old filter and replace with a new filter.
- At the same time, run the unit to test its operation. If there are any problems with the unit, report them to the manager for correction.
- Where practical, remove units from the windows on October 1 of each year, and store in a dry area, on a level surface. Where this is not practical, seal the units with an appropriate cover to prohibit air infiltration in the winter. Units should be returned to the window no later than June 1.

### 10.1.3 Systems Inventory Information

The Ventilation and Air Conditioning Inventory & Specification sheet must include information on all window air conditioner units, including all filters and other spare parts information, location information and shall be maintained in the Systems Inventory Book and updated as needed. A site map can be used to supplement the location information if necessary. The Inventory shall also include a master inspection and service checklist specific to the units at the site. See S: FamEld Drive, SOP Master Building Systems Appendices for sample master Ventilation and Air Conditioning inventory, specification and checklists forms.

### 10.1.4 Service Records

Copies of all records of all Ventilation and Air Conditioning preventive maintenance activities including all inspection checklists, services [including annual filter changing and testing of the unit by the resident custodian], repairs etc will be filed in the annual Service Record Binder in the appropriate Section. Records of all preventive maintenance (P) work orders shall be filed in the annual Service Record Binder as well as the work order system files. Records of all preventive maintenance purchase orders shall be filed in the annual Service Record Binder as well as the purchase order system files. All preventive maintenance activities must be included and tracked on your Annual Preventive Maintenance Plan – Schedule and Report form See S: FamEld Drive, SOP Master Building Systems Appendices for sample Annual PM Plan – Schedule and Report Form. Contractor service calls should indicate the work performed.

## 10.2 Roof Top Exhaust Fans

### 10.2.1 Objective:

To insure continuous operation of all roof top exhaust fans and to limit repair and service calls.

### 10.2.2 Scheduled Activities:

**Weekly/Quarterly**
Manager/Maintenance Superintendent's Responsibilities:
To check the operation of rooftop fans at each Building and Grounds Inspection and to issue work orders or place purchase orders to repair any inoperable units.

**Annually**
Maintenance Superintendent Responsibilities:
To schedule annual preventive maintenance of all roof top fans by a qualified electrician. These scheduled preventive maintenance visits should occur during the period from April through September.

### 10.2.3 Systems Inventory Information

The Roof Top Exhaust Fan Inventory & Specification sheet must include location and spare part information and shall be maintained in the Systems Inventory Book and updated as needed. A site map can be used to supplement the location information if necessary. The Inventory shall also include a master inspection and service checklist specific to the system at the site. See S: FamEld Drive, SOP Master Building Systems Appendices for sample master Roof Top Exhaust Fan inventory, specification and checklists forms.

### 10.2.4 Service Records

Copies of all records of all Roof Top Exhaust Fan preventive maintenance activities including all inspection checklists, services, repairs etc will be filed in the annual Service Record Binder in the appropriate Section. Records of all preventive maintenance (P) work orders shall be filed in the annual Service Record Binder as well as the work order system files. Records of all preventive maintenance purchase orders shall be filed in the annual Service Record Binder as well as the purchase order system files.

All preventive maintenance activities must be included and tracked on your Annual Preventive Maintenance Plan – Schedule and Report form See S: FamEld Drive, SOP Master Building Systems Appendices for sample Annual PM Plan – Schedule and Report Form.

## 10.3 Boiler Room Make-up Air Units

### 10.3.1 Objective:

To insure the continuous operation of all make-up air units (fans) and related equipment.

### 10.3.2 Scheduled Activities:

**Annually**
Firemen Responsibilities:

On an annual basis, the Fireman shall change filters and clean the coils in the air handling units to insure clean and adequate airflow. As needed, more frequent cleanings of the coils may be required.

Manager/Maintenance Superintendent Responsibilities:
The manager shall insure that annual preventive maintenance of all central air handling units is completed by a BHA mechanic or by a qualified contractor using a purchase order. See S: FamEld Drive Master Building Systems Appendices for annual preventive maintenance checklists.

**As Needed**
Fireman Responsibilities:
As needed, the Fireman shall assure that there are no cleaning supplies, solvents, or other odor or out-gas producing materials stored adjacent to ventilation equipment.

Manager Responsibilities:
To make all repairs as needed through issuance of a work order or purchase order as needed. To maintain stock on hand for all filters required.

### 10.3.3 Systems Inventory Information

The Boiler Room Make-up Air Unit Inventory & Specification sheet must include information on type and size of filters, if required, location and spare part information and shall be maintained in the Systems Inventory Book and updated as needed. A site map can be used to supplement the location information if necessary. The Inventory shall also include a master inspection and service checklist specific to the system at the site. See S: FamEld Drive, SOP Master Building Systems Appendices for sample master Boiler Room Make-up Air Unit inventory, specification and checklists forms.

### 10.3.4 Service Records

Copies of all records of all Boiler Room Make-up Air Unit preventive maintenance activities including all inspection checklists, services, repairs etc will be filed in the annual Service Record Binder in the appropriate Section. Records of all preventive maintenance (P) work orders shall be filed in the annual Service Record Binder as well as the work order system files. Records of all preventive maintenance purchase orders shall be filed in the annual Service Record Binder as well as the purchase order system files.

All preventive maintenance activities must be included and tracked on your Annual Preventive Maintenance Plan – Schedule and Report form See S: FamEld Drive, SOP Master Building Systems Appendices for sample Annual PM Plan – Schedule and Report Form.

## 10.4 Air Handling Units/Common Area Ventilation

### 10.4.1 Objective:

To insure the continuous operation of all air handling units (fans) and related equipment.

### 10.4.2 Scheduled Activities:

**Weekly/Quarterly/As Needed**
Management Staff/Custodians/Laborers/Janitor Groundskeepers Responsibilities:
As part of weekly and quarterly building walk-through inspections, staff shall insure that there is no cleaning supplies, solvents, or other odor or out-gas producing materials stored adjacent to ventilation equipment.

Manager Responsibilities:
To make all repairs as needed through issuance of a work order or purchase order and to maintain stock on hand for all filters required.

**Annually**
Manager/Maintenance Superintendent Responsibilities:
The manager shall insure that annual preventive maintenance of all central air handling units is completed by a BHA mechanic or by a qualified contractor using a purchase order. This shall include changing filters and cleaning coils.

### 10.4.3 Systems Inventory Information

An Air Handling Units/Common Area Ventilation Inventory & Specification sheet including information on type and size of filters, if required, location and spare part information shall be maintained in the Systems Inventory Book and updated as needed. A site map can be used to supplement the location information if necessary. The Inventory shall also include a master inspection and service checklist specific to the system at the site. See S: FamEld Drive, SOP Master Building Systems Appendices for sample master Air Handling Units/Common Area Ventilation inventory, specification and checklists forms.

### 10.4.4 Service Records

Copies of all records of all Air Handling Units/Common Area Ventilation preventive maintenance activities including all inspection checklists, services, repairs etc will be filed in the annual Service Record Binder in the appropriate Section. Records of all preventive maintenance (P) work orders shall be filed in the annual Service Record Binder as well as the work order system files. Records of all preventive maintenance purchase orders shall be filed in the annual Service Record Binder as well as the purchase order system files.

All preventive maintenance activities must be included and tracked on your Annual Preventive Maintenance Plan – Schedule and Report form See S: FamEld Drive, SOP Master Building Systems Appendices for sample Annual PM Plan – Schedule and Report Form.

## 10.5 Split System Air conditioning Systems and Heat Pumps

### 10.5.1 Objective:

To insure the proper operation and maintenance of split system air conditioning systems and heat pump units. These are generally located in Elderly developments to cool and heat common areas.

### 10.5.2 Scheduled Activities:

**Weekly/Quarterly**
Manager/Maintenance Superintendent Responsibilities
The manager shall inspect all components of split system air conditioning systems/heat pump units for obvious signs of damage during each weekly and quarterly building and grounds inspection.

**Annually/ twice yearly**
Manager/Maintenance Superintendent Responsibilities
The manager shall issue a Purchase Order at least once each year, during the period from April to May, for annual preventive maintenance services on the split system air conditioning system /heat pump unit to a qualified contractor. Managers may determine that twice annual service is required, particularly if the unit runs both heat and air conditioning, in which case service Purchase Orders should additionally be issued in the fall of each year.

**As Needed**

Manager/Maintenance Superintendent Responsibilities

The maintenance superintendent/manager shall insure repair of split system air conditioning and heat pump units on an as needed basis.

### 10.5.3 Systems Inventory Information

A Split system air conditioning systems and Heat pump units Inventory & Specification sheet, including location and spare part information shall be maintained in the Systems Inventory Book and updated as needed. A site map can be used to supplement the location information if necessary. The Inventory shall also include a master inspection and service checklist specific to the systems at the site. See S: FamEld Drive, SOP Master Building Systems Appendices for sample master split system air conditioning systems and heat pump unit's inventory, specification and checklists forms.

### 10.5.4 Service Records

Copies of all records of all Split system air conditioning systems and Heat pump units' preventive maintenance activities including all inspection checklists, services, repairs etc will be filed in the annual Service Record Binder in the appropriate Section. Records of all preventive maintenance (P) work orders shall be filed in the annual Service Record Binder as well as the work order system files. Records of all preventive maintenance purchase orders shall be filed in the annual Service Record Binder as well as the purchase order system files.

All preventive maintenance activities must be included and tracked on your Annual Preventive Maintenance Plan – Schedule and Report form See S: FamEld Drive, SOP Master Building Systems Appendices for sample Annual PM Plan – Schedule and Report Form.

# Chapter 11 Roofs

## 11.1 Flat Roofs

### 11.1.1 Objective:

To identify necessary maintenance, repair and replacement of building roofs, minimize damage to facilities resulting from faulty roofing and to inspect and maintain new roof work.

### 11.1.2 Scheduled Activities:

**Weekly/Quarterly**
Laborers/JGs/Custodians/Manager Maintenance Superintendent Responsibilities
Check roofs for obvious problems during all weekly walk-through inspections, and carefully inspect roofs during the quarterly Buildings and Grounds Inspections. Make all access to roofs secure, including doors and windows. Direct staff in any clean up activities required, write work orders for any repairs needed, insure that work orders are completed by the staff or contractors. Report major problems to the Service Programs Coordinator for correction.

**Quarterly**
At least once per quarter, this inspection should take place during or immediately following a rainstorm.

Flat Roof inspections shall include checking for:

1. Clogged drains and/or standing water.
2. Drain caps in place/strainers in place and unbroken
3. Debris requiring removal
4. Unauthorized equipment attached to the roof requiring removal
5. Condition of penthouse doors and windows/hatch
6. Problems with exhaust fans
7. Signs of flashing or parapet wall disrepair
8. Vegetation, tree growth at roof edge or above
9. Any other obvious problem or defect

**Annually**
Roofing Crew Responsibilities:
The Roofing Crew shall perform an annual inspection of all roofs and submit a report to the Manager. This report should be maintained in the Preventive Maintenance Service Record Book and any corrective actions needed should be coordinated by the Manager. Roof materials must be consistent and compatible with the current roofing system.

### 11.1.3 Systems Inventory Information

A Roof Inventory & Specification sheet including date of installation, warranty and material specification information and location information shall be maintained in the Systems Inventory Book and updated as needed. A site map can be used to supplement the location information if necessary. The Inventory shall also include a master inspection and service checklist specific to the system at the site. See S: FamEld Drive, SOP Master Building Systems Appendices for sample master Roof inventory, specification and checklists forms.

### 11.1.4 Service Records

Copies of all records of all roof preventive maintenance activities including all inspection and services checklists, repairs etc will be filed in the annual Service Record Binder in the Roofing Section. Records of all preventive maintenance (P) work orders shall be filed in the annual Service Record Binder as well as the work order system files. Records of all preventive maintenance purchase orders shall be filed in the annual Service Record Binder as well as the purchase order system files.

All preventive maintenance activities must be included and tracked on your Annual Preventive Maintenance Plan – Schedule and Report form See S: FamEld Drive, SOP Master Building Systems Appendices for sample Annual PM Plan – Schedule and Report Form.

## 11.2 Pitched Roofs

### 11.2.1 Objective:

To identify necessary maintenance, repair and replacement of building roofs to minimize damage to facilities resulting from faulty roofing.

### 11.2.2 Scheduled Activities:

**Weekly/Quarterly**
Managers/Maintenance Superintendent Responsibilities:
Roofs should be checked for obvious problems during all weekly walk-through inspections, and carefully inspect roofs during the quarterly Buildings and Grounds Inspections. Direct staff in any activities required, write work orders for any repairs needed, insure that work orders are completed by the staff or contractors. Report major problems to the service programs coordinator for correction.

**Quarterly**
At least once per quarter, this inspection should take place during or immediately following a rainstorm.

Pitched Roof inspections shall include checking for:
1. Clogged or damaged gutters and downspouts
2. Condition of the facia board.
3. Condition of roof tiles/roofing materials
4. Unauthorized antennas/satellite dishes
5. Condition of flashing
6. Attic ventilation grills
7. Vegetation
8. Any other obvious problem or deficiency

**Annually**
Roofing Crew Responsibilities:
The Roofing Crew shall perform an annual inspection of all roofs and submit a report to the Manager. This report should be maintained in the Preventive Maintenance Service Record Book and any corrective actions needed should be coordinated by the Manager.

### 11.2.3 Systems Inventory Information

A Roof Inventory & Specification sheet including date of installation, warranty and material specification information and location information shall be maintained in the Systems Inventory Book and updated as needed. A site map can be used to supplement the location information if necessary. The Inventory shall also include a master inspection and service checklist specific to the system at the site. See S: FamEld Drive, SOP Master Building Systems Appendices for sample master Roof inventory, specification and checklists forms.

### 11.2.4 Service Records

Copies of all records of all roof preventive maintenance activities including all inspection checklists, services, repairs etc will be filed in the annual Service Record Binder in the Roofing Section. Records of all preventive maintenance (P) work orders shall be filed in the annual Service Record Binder as well as the work order system files. Records of all preventive maintenance purchase orders shall be filed in the annual Service Record Binder as well as the purchase order system files. All preventive maintenance activities must be included and tracked on your Annual Preventive Maintenance Plan – Schedule and Report form.

# Chapter 12 Small Engine Equipment, Power Tools and Skid Steer Loaders

## 12.1 Small Engine Equipment and Power Tools

### 12.1.1 Objective:

To keep all BHA small engine equipment [lawn mowers; lawn tractors; hedge trimmers; weed trimmers; chainsaws; leaf blowers; leaf vacuums; power edgers; power pole pruners; snow blowers; power brooms/sweepers; drain machines; generators etc] and power tools [drills; planers; saws; grinders; screw guns; chipping hammers; cutting torch etc] in prime working condition. To insure long life, safety of operation, availability at all times needed and to limit the cost for repairs and replacements.

### 12.1.2 Scheduled Activities for Operation and maintenance of Small Equipment

**On –going**

Equipment Operator's Responsibilities:

Small Engine Equipment and Power Tools may not be left unattended by Operator when in use. Staff shall be held responsible for equipment stolen due to failure to adhere to this policy. Each employee is responsible for the equipment or tool they are using. The employee should check their equipment at the start of the job and must report any problem immediately. If the employee encounters any problems during the workday with a tool or equipment this also must be reported to a supervisor immediately.

Manager/Maintenance Superintendents Responsibilities:

Manager/Superintendents shall insure that all employees operating any piece of equipment are given copies of the manufacturer's specifications on usage and care of all power tool or small engine equipment that employee may be using. Equipment operators should understand the potential hazards as well as the safety precautions to prevent those hazards from occurring.

It is the supervisor's responsibility to secure all small equipment in proper storage locations when not in use. Run gas out first if storage is in an occupied building. Small Engine Equipment should be kept in a secured area. All hand power tools must be kept in a locked gang box at the end of each work day. All tools and equipment must remain at the development they are assigned. Any employee that removes a tool or equipment for their personal use will be subjected to disciplinary action. Any tool which is shared by more than one employee shall be kept in a central, secure location and a sign out/sign in system will be used; each employee using this equipment must sign it out. All small engine equipment and power tools that are damaged shall be removed from use and tagged **"Do Not Use."**

**Annually**

Manager/Maintenance Superintendents Responsibilities:

Managers/Superintendents shall insure that all employees using equipment are properly trained. The Risk Management Department in conjunction with the Operations Department provides annual training in Small Engine Equipment – Safety & Maintenance. The training program is scheduled in April annually. All employees using small engine equipment must attend this annual training. For new employees, superintendents can contact the Risk Manager to schedule a training session, if employee commences work after the April Training Session.

The Manager/ Maintenance Superintendent shall be responsible for issuing purchase orders to reputable small equipment service companies for annual service and tune-ups to all small engine equipment. All snow removal equipment must be serviced between April and October each year and newly serviced snow removal equipment must be on site before November 1 of each year. Landscape power equipment must be serviced between November 1 and April 1 of each year, but no later than April 15.

### 12.1.3 Servicing Small Engine Equipment

See Public Folders P-drive, SOP Appendices folder for a listing of recommended small engine equipment service companies [or Contact the Procurement Department] that you can contact for quotes when seeking bids for service/repair work [this listing may be updated at any time]. The manager/superintendent shall maintain records of all service to small engine equipment and power tools in the annual Service Records binder.

### 12.1.4 Purchasing New Equipment

The Manager/Maintenance Superintendent shall be responsible for seeking quotes and issuing purchase orders to reputable small equipment vendors to procure new equipment as needed. The Risk Manager in conjunction with the Landscape Management Coordinator has developed a listing of approved items and specifications for landscape small engine equipment to be utilized when purchasing new equipment. See Public Folders P-drive, SOP Appendices folder for a listing of approved items and a listing of small engine equipment Vendors or contact the Procurement Department. [This listing maybe updated at anytime.

### 12.1.5 Small Engine Equipment & Power Tools - Safe Operation & Maintenance Policies:

It is the responsibility of the superintendent to make sure that all staff operating small engine equipment and power tools is following all proper maintenance and safety policy and procedures as outlined in the equipment/tool manufacturer's manuals. General small engine equipment safety and maintenance guidelines for equipment operators are outlined below to supplement the equipment/tool manufacturer's manual and located in the appendix as a checklist form.

Superintendents and operators need to know and understand all small engine equipment and power tools. Superintendents and operators must read and understand the owner's manual and labels affixed to the tool. Learn its application and limitations as well as the specific potential hazards peculiar to this equipment/tool. Equipment operator must check all equipment:

- For noticeable defects and damage.
- To insure the gas tank is full
- To make sure when using two-stage equipment such as weed trimmers and leaf blowers that the machines are using the proper Gas/Oil Mix. (Bluish color).
- If using an electric power tool, check extension cord for any damage.
- Make sure all safety devices are in place and in proper working order including safety shields on snow blowers and plastic shields on weed trimmers.
- Check lawnmower blades for noticeable chunks and divots missing.
- When using weed trimmer check head to make sure it is secure and has proper amount of line.

### 12.1.6 Rules for Safe Operation of Small Engine Equipment and Power Tools

All equipment operators must follow strict safety requirements:

- Small engine equipment operators must walk the work area and remove any foreign objects – glass; bottles; large rocks; trash and any other item that may cause injury to the operator before using the equipment.
- Operators must never Start-Up and/or Operate small engine equipment indoors.
- Equipment Operators must put on safety glasses when operating any small engine equipment or power tool.
- Equipment operator must use hearing protection when appropriate E.g. when using power equipment such as leaf blowers; weed trimmers and chainsaws.
- Power tool operators must not expose electric power tools to rain.

- Power tool operators must not use electric power tools in damp or wet location or in the presence of flammable fluids or gases.
- Electric tools should be operated within their design limitations. Use the right tool for the job!
- All work areas should be well lit.
- Equipment/Tool operator must watch what he/she is at all times doing.
- Never overreach – keep proper footing and balance at all times.
- Dress properly – do not wear loose clothing or jewelry when operating equipment as they can get caught in moving parts.
- Power tool operators must disconnect tool from power source when not is use, before servicing or changing parts etc.
- Keep guards in place, in working order and in proper adjustment and alignment.
- Remove adjusting keys and wrenches when not in use, before servicing and when changing parts. Ensure that the switch is in "off" position before pulling in tool.
- Only trained repair persons should attempt repairs, electrical or mechanical.

### 12.1.7 General Maintenance of Power Equipment:

Equipment Operator must check engine oil every-time he/she uses a piece of power equipment. Oil must be changed every two months or as needed during summer and once during winter preventive maintenance. Air filter and gas filters must be checked; cleaned and replaced as needed. Spark plugs must be checked and cleaned once a month. Blades must be sharpened prior to season and as needed during season. Blades must be replaced if defective. Weed trimmer heads must be checked to make sure trimmer line spool is full. Gas/ oil mix must be checked often.

### 12.1.8 Storage of Equipment and Gas:

Equipment must be store only in designated areas. All gas cans, gas/oil mix and starter fluids must be placed inside a Certified Fire Protection Cabinet. Small engine equipment such as weed trimmers or leaf blowers must never be hung from steam and hot water pipes and natural gas lines. Spark plug wires must be removed when putting equipment away or when employee is working on a piece of equipment. During winter months make sure all equipment except snow blowers have all petroleum products drained and the equipment serviced for the following year. All employees operating any piece of equipment must be given copies of the manufacture's specification on usage and care of all power tool or small engine equipment that employee may be using.

### 12.1.9 Equipment Rental

Consider the Equipment Rental option for site tasks that occur occasionally and for which purchasing equipment would be not cost effective. There is a Statewide Contract for Rental Equipment, refer to S: FamEld Drive SOP appendices for the list of Vendors on this Contract or check with the Procurement Department. As with purchasing goods or service, you will need to comply with all procurement procedures with renting equipment.

### 12.1.10 Systems Inventory Information

A small engine equipment and power tools Inventory & Specification sheet including date of purchase, date of service and warranty information shall be maintained in the Building systems Inventory Book and updated as needed. The Inventory shall also include all scheduled checklist forms specific to the equipment at the site, as applicable. See S: FamEld Drive, SOP Master Building Systems Appendices for sample small engine equipment and power tools Inventory, specification and checklists forms.

All small equipment and power tools must be tagged with asset number and service date records. All equipment/tool manuals and warranty information must be kept on file in maintenance Update this record as new equipment is purchased and/or old equipment removed from service.

### 12.1.11 Service Records

Copies of all records of all small engine equipment and power tools preventive maintenance activities including all inspection checklists, services, repairs and replacement etc will be filed in the annual Service Record Binder in the Appropriate Section. Records of all preventive maintenance purchase orders for regular and as needed services shall be filed in the annual Service Record Binder as well as the purchase order system files.

All preventive maintenance activities must be included and tracked on your Annual Preventive Maintenance Plan – Schedule and Report form See S: FamEld Drive, SOP Master Building Systems Appendices for sample Annual PM Plan – Schedule and Report Form.

## 12.2 Skid Steer Loaders

### 12.2.1 Objective:

To ensure the continuous safe operation of the Development's skid steer loader.

### 12.2.2 Operator Licensing Requirements

All employees using Skid Steer Loaders [or a compressed air, diesel, electric, gasoline, or steam drum hoists or winches to lift and move loads] must possess a valid, current Hoisting License. It is the responsibility of the superintendent to insure that all employees operating a Skid Steer Loader [or a compressed air, diesel, electric, gasoline, or steam drum hoists or winches to lift and move loads] have a valid and current Hoisting License. See Fam/Eld S:Drive, SOP Appendices for more information

### 12.2.3 Training Requirements

Superintendents shall insure that all employees operating skid steer loaders are licensed and are properly trained. All Operators should understand the potential hazards as well as the safety precautions to prevent those hazards from occurring. See Public P-Drive, SOP Appendices for the handout on Skid Steer Loader Training, a training developed by the Risk Manager and Landscape Management Coordinator. All Skid Steer Loader Operators must receive a copy of this handout and a copy must be posted in the maintenance office. The Risk Management Department in conjunction with the Operations Department provides annual training in Skid Steer Loader – Safe Operation & Maintenance. The training program is usually scheduled in November. All employees operating Skid Steer Loaders must attend this annual training.

### 12.2.4 Scheduled Activities for Safe Operation and Maintenance of Skid Loader:

**Daily / Upon Each use**
Operator's Responsibilities:
Operating a Skid loader is a very serious undertaking and as with all equipment/tools – power and non-power - the operator must exercise extreme care before, during and after operation.

Prior to use, the Operator must:

- Check all fluids including water (for water cooled engines), diesel fuel, and oil
- Perform a walk-around inspection of the vehicle
- Check for defects, including tires, lights; safety features; lift arms and cylinder pivot pins; attachments and other components
- Make sure that everything is in tact and working properly.

- Report any problem immediately.

If the operator encounters any problems during the workday with the skid loader this also must be reported to a supervisor immediately.

Prior to, during and after use of Skid Steer Loaders, Operators must:

- Familiarize him/herself with the work area before operating the skid loader, checking for obstacles and avoiding uneven terrain and steep slopes.
- Turn off the engine when fueling the skid loader.
- Never overload the bucket (refer to the Manufacturer's manual for optimal load amounts and make sure you are using the right size bucket for the machine you are operating).
- Use the equipment carefully to avoid harm to property or persons.
- Never lift, swing, or move a load over any person
- Never start to dig at a site unless Dig Safe has provided clearance.
- Clean the equipment after each use.
- Report any problem immediately. If the employee encounters any problems during the workday with a tool or equipment this also must be reported to a supervisor immediately.
- Always adhere to the safety precautions found in the Manufacturer's operation & maintenance manual.

Maintenance Superintendent Responsibilities - Ongoing:
The Maintenance Superintendent shall insure that the equipment is properly stored, maintained and operated at all times. In the event of equipment failure or breakdown, the maintenance superintendent is responsible for contacting the Service Company and issuing a purchase order for repairs and/or service as needed.

**Three Times Per year**
Service Programs Coordinator Responsibilities
The service program coordinator will insure that preventive maintenance services are carried out on all Skid Steer Loaders (at the sites) at least three times per year. The service program coordinator shall issue a contract or purchase order on an annual basis and shall have the equipment serviced on site in approximately October, February and July of each year.

Contractor Responsibilities
The contractor shall be responsible for completing full cleaning and servicing as called for by the BHA's purchase description and by manufacturer operating and maintenance recommendations. The service contractor shall leave with site staff a full service slip after each planned maintenance or repair visit, detailing work completed and noting any further corrective action needed. This slip must be signed by a site staff member who can verify that work was performed.

### 12.2.5 Systems Inventory Information

A Skid Loader Inventory & Specification sheet including date of purchase, date of service, list and model number for all attachments and warranty information shall be maintained in the Building systems Inventory Book and updated as needed. The Inventory shall also include all scheduled checklist forms specific to the Skid Loader at the site. See S: FamEld Drive, SOP Master Building Systems Appendices for Skid Loader Inventory, specification and checklists forms. The Service Program Coordinator will also maintain these records.

### 12.2.6 Service Records

Copies of all records of all Skid Loader preventive maintenance activities including all inspection checklists, services, repairs etc will be filed in the annual Service Record Binder in the Appropriate Section. Records of all preventive maintenance purchase orders for regular and as needed services shall be filed in the annual

Service Record Binder as well as the purchase order system files. The Service Program Coordinator will also maintain these records.

All preventive maintenance activities must be included and tracked on your Annual Preventive Maintenance Plan – Schedule and Report form See S: FamEld Drive, SOP Master Building Systems Appendices for sample Annual PM Plan – Schedule and Report Form.

# Chapter 13 Vehicles/Trucks

## 13.1 Objective:

To maintain trucks to insure long life, safety of operation, and availability at all times needed.

## 13.2 Scheduled Activities:

**Daily/Upon each use:**
Laborer/Truck Driver Responsibilities:
It is the responsibility of the truck driver to do a visual check of the truck daily and check the fluids every time the truck is fueled. The driver shall, at each re-fueling, complete a thorough inspection of each vehicle and complete the truck inspection checklist each time this is completed. All vehicles shall be kept clean and debris free at all times and be washed as often as needed. During the winter months as salt and sand builds up this task should be performed more often at the site. After every snow/ice storm, all snow/ice removal vehicles (trucks, plows, sanders, etc) must be wiped down and cleaned thoroughly. Trucks and plows should be free of salt. Augers and other parts of sanders should be clean. Refer to Snow Removal, Chapter 14.

**As needed**
Laborer/Truck Driver Responsibilities:
Scrape and paint racks and body parts as needed to keep rust free. Clean up rust and re-paint at site.

In snow removal operations do not use overdrive and plow in low gear. Rubber bumpers are recommended for plow blades. Plow blades should be removed from trucks within 24 hours after a storm.

**Quarterly/Annual - Regular Service**
Garage Staff Responsibilities
The Garage staff maintains a schedule for regular service for all vehicles. They will contact superintendents/other staff when it is time for the truck to go to the garage for service.

## 13.3 Usage Policy/Licensing

It is the responsibility of the supervisor to give out and explain the BHA policy on motor vehicle usage to the truck driver and the back up driver. A copy of the policy will be kept in the glove compartment.

If an employee operates heavy equipment he or she must have an appropriate license. Supervisors should have a copy of a valid driver's license for every employee who drives a BHA vehicle. It is the employee's responsibility to inform supervisors of any change in their license status, but supervisors should also check periodically that all drivers have an up to date driver's license. Copies of all drivers' licenses must be forwarded to the Risk Management Department.

BHA will pay for renewal of special licenses (such as hoisting licenses for Skid Loaders, refer to chapter 34). The renewal application must be submitted to the Manger who will complete a check requisition.

Trucks may not be used to transport other staff members to appointments, court or other locations except in emergencies.

## 13.4 Insurance and Accidents/Reporting

Report accidents immediately, no matter how small, to Risk Management and the Garage.

The Authority is not self-insured as to its fleet and equipment. The Authority carries full coverage on vehicles and equipment 1997 and newer. Collision coverage carries a $500 deductible and glass carries no deductible.

Be sure there is an Insurance ID card in each vehicle; these can be replaced if needed by Risk Management.

There should be an accident information card in each vehicle to assist in obtaining information at the scene of an accident. If not, the garage has extra copies.

Report all accidents whether there is damage or not to Risk Management using the Commonwealth of Massachusetts Report of Motor Vehicle Accident Form. Risk Management will report to police and Registry.

Accidents with Authority vehicles are not reflected on personal driving records.

If another party does damage to a BHA vehicle Risk Management will assume responsibility for obtaining reimbursement. Staff involved in an accident or witnessing the damaged should obtain and report the name and address of the responsible party.

Body damage should be repaired on newer trucks.

## 13.5 Vehicle Towing Policy

In the event that a BHA vehicle has been towed or stolen the following procedures must be followed:

1. Notify the direct Supervisor/Manager and Garage Forman of the following items;

    a. Vehicle ID, including plate (this should be documented at the site or can be obtained from the Garage).
    b. Where the vehicle was parked (include cross street references)?
    c. Was it a legal space?
    d. What time was the vehicle last seen?
    e. Make note of any obvious signs of vandalism, broken glass at the space etc.

2. Once the vehicle is located, have a valid Registration available with the person picking it up. Purchase Order #'s will be needed if fees are assessed.

3. Inventory the vehicle for any additional damage or missing items. Submit a detailed report to Risk Management and copy the Garage of these items.

4. The site is liable for fees incurred by towed vehicles and additional fees for storage if the vehicle isn't located by the end of business of the first (1st) day. This charge will compound daily so follow-up is critical.

## 13.6 Systems Inventory Information

The garage maintains all information regarding all vehicles.

## 13.7 Service Records

Copies of all records of all vehicle/truck preventive maintenance activities including all inspection checklists, service-slips from the BHA Garage or outside Garage for each vehicle will be filed in the annual Service

Record Binder in the Vehicle Section. Records of all preventive maintenance (P) work orders shall be filed in the annual Service Record Binder as well as the work order system files. Records of all preventive maintenance purchase orders shall be filed in the annual Service Record Binder as well as the purchase order system files.

All preventive maintenance activities must be included and tracked on your Annual Preventive Maintenance Plan – Schedule and Report form See S: FamEld Drive, SOP Master Building Systems Appendices for sample Annual PM Plan – Schedule and Report Form.
A copy of the completed work order should be provided to the Manager. The Garage staff also maintains these records.

# Chapter 14 Trash Chutes and Compactors

## 14.1 Objective:

To maintain trash chutes and compactors in as clean a manner as possible, discouraging pest infestation, and to maintain compactors in such a way as to prolong their life as much as possible. Most compactor use is in elderly buildings.

## 14.2 Scheduled Activities:

**Daily**

Custodian/Laborer/Groundskeeper Responsibilities:
Check trash rooms to insure that all trash is removed or put down the chute. Maintain chute doors and trash room floors and walls in a clean condition. Wipe down all surfaces with disinfectant. Sweep up and dispose of any trash or garbage that escapes from the chute.

For bag-type compactors: Pull trash at least daily. Secure bags tightly and place into rubbish containers where possible. Where there are no rubbish containers, place bag in an out of the way location and insure that it is well secured to avoid odors and attraction to roaches or rodents.

For container type compactors: Pull containers in accordance with the schedule for pick up. Before returning the container to the building, wash out completely by spraying disinfectant and hosing down.

**As needed**
Custodian/Laborer/Groundskeeper Responsibilities:
The custodian/laborer/groundskeeper shall report to the manager/maintenance superintendent any problems with the operation of the chute doors, the proper fit of the chute seals, or the operation of the compactor immediately for correction.

**Weekly**
Custodian/Laborer/Groundskeeper Responsibilities:
In buildings where there is chute-washing equipment in operable condition, the custodian/laborer/groundskeeper shall wash down the chute on a weekly basis.

Manager/Maintenance Superintendent's Responsibilities:
The manager shall note the condition of trash rooms and the compactor and compactor room at each weekly inspection. The chute doors are to be checked for a proper seal. Any needed repairs shall be completed by a contractor upon issuance of a purchase order by the manager or by a BHA employee after issuance of a work order.

**Annually**
Manager/Maintenance Superintendent's Responsibilities
Once per year, the manager shall issue a purchase order to have the trash chutes steam cleaned, and chute door seals replaced when necessary by an appropriate contractor. Once per year, the manager shall issue a purchase order to have each compactor serviced by an appropriate compactor repair/service company.

## 14.3 Systems Inventory Information

A trash chute and compactor Inventory & Specification sheet including location and replacement part information shall be maintained in the Building systems Inventory Book and updated as needed. A site map

can be used to supplement the location information if necessary. The Inventory shall also include all scheduled checklist forms specific to the system at the site. See S: FamEld Drive, SOP Master Building Systems Appendices for sample master trash chute and compactor inventory, specification and checklists forms.

## 14.4 Service Records

Copies of all records of all trash chute and compactor preventive maintenance activities including all inspection checklists, services, repairs [e.g. repair/replacement to chute doors] etc will be filed in the annual Service Record Binder in the appropriate Section. Records of all preventive maintenance (P) work orders shall be filed in the annual Service Record Binder as well as the work order system files. Records of all preventive maintenance purchase orders shall be filed in the annual Service Record Binder as well as the purchase order system files.

All preventive maintenance activities must be included and tracked on your Annual Preventive Maintenance Plan – Schedule and Report form See S: FamEld Drive, SOP Master Building Systems Appendices for sample Annual PM Plan – Schedule and Report Form.

# Chapter 15 Regular Custodial Preventive Maintenance

## 15.1 Introduction

Regular Custodial Maintenance policies and procedures are covered in detail in Part 2 of this Manual – topics include Building and Grounds Inspections, Hallway and Common Area Maintenance, Grounds and Landscape Care, Snow Removal, Trash Removal and Pest Management. In these chapters we covered maintenance activities performed by laborers, JGs, resident custodians etc on a routine basis, occurring on a daily/weekly schedule as well as activities performed by maintenance staff [or others] on a non-routine basis occurring on a cyclical schedule annually. *Cyclical schedule annually* means occurring at varying intervals throughout the year. The cycle frequency may be quarterly – that is an activity will need to be scheduled 4 times a year, semi-annual – twice a year or annual only needs to be performed once a year.

The cyclical schedule of activities for Custodial preventive maintenance may depend on the season/weather [e.g. as with Snow Removal]; sometimes the cycle will be on a *fixed* schedule annually [e.g. Mosquito Control in late June]; and sometimes the cycle may be on an as-needed basis [e.g. frequency for scheduling basement flea/pest control may depend on the actual level of infestation].

In this chapter we are going to take a look at each topic and further discuss scheduling regular custodial maintenance activities for preventive maintenance in order to maintain the high standards for custodial maintenance expected. As with other preventive maintenance activities these maintenance custodial activities must be included and tracked on your Annual Preventive Maintenance Plan – Schedule and Report form See S: FamEld Drive, SOP Master Building Systems Appendices for sample Annual PM Plan – Schedule and Report Form.

Copies of all inspections, service records, tracking reports, repair records etc for all custodial maintenance activities subject to preventive maintenance must be maintained in the Annual Service Record Binder in the appropriate sections.

## 15.2 Buildings [Refer to chapters 10, 11 & 12]

### 15.2.1 Objective:

To maintain the buildings [interior and exterior] at the highest possible level of cleanliness, to perform regular inspections to check on safety and repair requirements and to rid all developments of pests. Note: - Building systems [e.g. elevators, fire alarms, electrical, heating, plumbing, generators, ventilation, roofs etc] are covered in the previous chapters in this part of the Manual.

### 15.2.2 Scheduled Activities

**Daily/Weekly**

Laborers/JGs and Resident Custodian Responsibilities
All interior common areas [lobby/entrances, interior hallways, stairways, common rooms, laundry rooms etc] and all building exterior [doors, windows, roofs, gutters, downspouts etc] should be inspected daily for any litter, graffiti, damage or potential hazards etc. All common areas - should be thoroughly cleaned daily – cleaned meaning all litter picked up and all areas swept. All common areas – walls, floors, ceilings etc should be thoroughly cleaned - washed down weekly. All items detailed on the Building & Grounds Inspection short-form should be inspected at least weekly accordance with the defined standards detailed in Chapter 11. Any

problems observed must be reported to the Manager or Maintenance Superintendent on the day the problem is identified. Problems may include – graffiti or damage to stair treads, carpets, railings, stair pans, windows, roofs, Entry/Exit/Fire doors, mail boxes etc. All problems must be recorded on the weekly Buildings & Grounds inspections short-form.

Manager/ Maintenance Superintendent Responsibilities:
To insure that JGs, laborers, resident custodians work to a regular schedule so that it is possible to thoroughly clean all common areas at least weekly. To perform weekly inspections of all building hallways and common areas to insure that maintenance tasks are being performed as expected and as directed. To review the completed Building & Grounds Inspection short forms that JGs, laborers, resident custodians fill out and submit weekly. All deficiencies found during any inspection must be transferred to work orders for correction as either emergency or Building and Grounds priorities.

**Quarterly**
Manager/Maintenance Superintendent Responsibilities:
To schedule 3 or 4 times a year - the cleaning of the outside glass of windows where the windows tilt in. To conduct a formal Building & Grounds Inspection which includes inspection of the building exterior for each unique building address. To conduct a formal inspection of each interior common area where access is limited to BHA employees [utility rooms, boiler rooms]. To conduct a formal inspection of each interior common area that is regularly accessed by residents and/or general public. All deficiencies found during any inspection shall be transferred to work orders for correction as either emergency or Building and Grounds priorities.

**As needed**
Manager/ Maintenance Superintendent Responsibilities:
Any painting or other repairs should be scheduled as needed according to B&G priorities etc.

### 15.2.3 Service Records

Copies of all formal building & grounds quarterly inspections, any service records, tracking reports, repair records etc for any building maintenance activities subject to preventive maintenance shall be maintained in the Annual Service Record Binder in the appropriate sections. The weekly Building & Grounds inspections short-forms should be filed in a 3-Ring binder or file and can be sorted by JG/Laborer/Resident Custodian.

As with other preventive maintenance activities, maintenance custodial activities must be included and tracked on your Annual Preventive Maintenance Plan – Schedule and Report form See S: FamEld Drive, SOP Master Building Systems Appendices for sample Annual PM Plan – Schedule and Report Form.

## 15.3 Grounds and landscape Care [Refer to Chapter 13]

### 15.3.1 Objective

To maintain grounds and landscape to the highest standards for overall cleanliness and curb appeal of the developments, for health and safety of residents, employees and visitors and to the longevity of hardscape and greenscape surfaces. To identify necessary maintenance, repair and replacement of grounds and landscape elements to maintain these standards.

### 15.3.2 Scheduled Activities

**Daily/Weekly**

Laborers/JGs and Resident Custodian Responsibilities:

All grounds [including but not limited to walkways, steps, parking lots, stairwells, playgrounds, benches, fences, dumpsters etc] and landscaped areas should be inspected daily for graffiti, damage or potential hazards throughout the entire year. Potential hazards may include exposed nails, footings or sharp protrusions on benches, fences, play structures; play equipment not functioning as intended; large broken or low hanging tree branches; dead or diseased trees/shrubs; missing or broken handrails; large potholes; tripping hazards; obstructed stairwells/entranceways; vegetation obstructing views etc

All items detailed on the Building & Grounds Inspection short-form should be inspected at least weekly in accordance with the defined standards detailed in Chapter 11. All problems must be reported to the Manager or Maintenance Superintendent on the day the problem is identified. All problems must be recorded on the weekly Building and Grounds Inspection short-form. All trash must be picked up from all areas daily and grounds must be cleaned. Any clogged street drains; if clog is on the surface must be cleaned. All lawn areas must be mowed and trimmed weekly throughout the growing season as long as the grass is growing. All lawn areas must be watered weekly to supplement rainfall during the summer. All planting areas and paved areas should be weeded weekly or as often as is needed. If flower beds/pots are planted they must be routinely maintained throughout the growing season. All dead, damaged shrubs or small caliper trees must be routinely removed. Perform incidental pruning of trees and shrubs [that you can handle safely with the proper tools and personal protective gear] for safety and security reasons – i.e. remove dead/broken branches, raise tree crown for clearance, prune shrubs obstructing views etc]

Manager/ Maintenance Superintendent Responsibilities:

Perform weekly inspections of all grounds and landscaped areas to insure that all grounds and landscape maintenance tasks are being performed as expected and as directed. Review the completed Building & Grounds Inspection short forms that JGs, laborers, resident custodians fill out and submit weekly. All deficiencies [e.g. exposed nails, footings or sharp protrusions on benches, fences, play structures; play equipment not functioning as intended; large broken or low hanging tree branches; dead or diseased trees/shrubs; missing or broken handrails; large potholes; tripping hazards; obstructed stairwells/entranceways; vegetation obstructing views, broken hose bibs, blocked catch basins etc] found during any inspection shall be transferred to work orders for correction as either emergency or Building and Grounds priorities.

**Quarterly**

Manager/Maintenance Superintendent Responsibilities:

To perform formal quarterly inspections of the grounds of each building address [Refer to Chapter 11 – Building and Grounds Inspections]. Perform formal quarterly inspections of all play areas, benches, fences etc. All deficiencies found during any inspection shall be transferred to work orders for correction as either emergency or Building and Grounds priorities.

**Twice yearly**

Manager'/ Maintenance Superintendent's Responsibilities:

To insure that all storm drains are cleaned twice a year. [Refer to Chapter 31 Plumbing]

**Annually/Seasonally** [Refer to Chapter 13 and Landscape Manual for more detail on all aspects of landscape care].

Laborers/JGs/ Resident Custodian and Program Landscape Crew's Responsibilities
To perform a thorough clean up in the Spring annually. To edge, weed and mulch all planting areas in the Spring annually. To maintain and treat [fertilize/lime at a minimum] all lawn areas annually. To pickup and remove all leaves from all areas in the Fall. If flower beds/pots are planted they must be maintained. To prune all shrubs annually as needed at the proper times at a minimum for security and safety reasons.

Manager'/ Maintenance Superintendent's Responsibilities:
To insure that all landscaped tasks are scheduled and performed within the given timelines annually. Plan on contracting out some tree care services annually [for hazard reduction pruning and/or maintenance pruning] to outside professional arborists over the winter months. At a minimum, trees should be inspected regularly for obvious potential hazards and the necessary steps should be taken to take care of all potential hazards immediately either with in-house staff or outside contractors for security and safety reasons. To schedule a formal inspection of hose bib connectors annually to make sure they are in good working order prior to the start of the landscape season. To perform an annual evening safety and lighting inspection of the grounds [this is usually scheduled in October – refer to Chapter 26].

### 15.3.3 Plans & Service Records

As part of your Annual Preventive Maintenance Plan, Property Managers must submit a landscape maintenance plan for your Property to the Assistant Director of Property Management or Regional Property Manager no later than April 1st, annually. Refer to Chapter 13 for Landscape Planning guidelines.

All landscape maintenance services performed by in-house program landscape crews or outside landscape contractors must be tracked and recorded on serviced maintenance reports. See S: FamEld Drive, SOP Appendices for sample serviced maintenance reports.

All tree work performed by in-house staff should be scheduled and tracked using the work-order system. Records of all preventive maintenance (P) work orders shall be filed in the annual Service Record Binder as well as the work order system files. Records of all landscape care preventive maintenance purchase orders shall be filed in the annual Service Record Binder as well as the purchase order system files.

The formal Quarterly Building and Grounds inspection reports and playground/fence/bench inspection reports must be filed in the annual service record binder in the appropriate section. The weekly Building & Grounds short-forms should be filed in a 3-Ring binder or file and can be sorted by JG/Laborer/Resident Custodian.

As with other preventive maintenance activities, maintenance custodial activities must be included and tracked on your Annual Preventive Maintenance Plan – Schedule and Report form See S: FamEld Drive, SOP Master Building Systems Appendices for sample Annual PM Plan – Schedule and Report Form.

## 15.4 Snow Removal [Refer to Chapter 14]

### 15.4.1 Objective

To insure that Developments are properly prepared for the Snow Season annually. To insure that proper snow /ice removal procedures are in place and adhered to before, during and after every snow/ice storms.

### 15.4.2 Scheduled Activities:

**Annually**
Manager/Maintenance Superintendent's Responsibilities:
To insure that the Snow Plan for your Development(s) is in place no later than October 15th every year. All snow removal equipment and supplies must be on-hand also no later than Nov. 1st. Snow Removal equipment must be serviced between April and October every year [Refer to Chapter 34] and all equipment must be tested to make sure that it is in proper working order no later than Nov. 1st. Hydrants and Storm Drains must be marked. Landscaped areas must be protected as needed. Local back-up contractor listings must be updated etc

**Every Snow/Ice Storm**
Laborers/JGs and Resident Custodian Responsibilities:
To remove snow and ice according to the priority order outlined in your Snow Removal Plan and in accordance with proper standards and procedures outlined in Chapter 14

Manager/ Maintenance Superintendent's Responsibilities:
Property Managers/ Maintenance Supervisors must be on the grounds as much as possible during snow removal to oversee snow removal activities and problem solve. Report to your Assistant Director for Property Management or Regional Property Manager if any problem arises regarding equipment or completing snow removal work in a timely manner. Assistant Directors and Regional Property Manager will assist with problem solving and supplying additional resources if necessary.

### 15.4.3 Plans and Service Records

Property Managers must submit a Snow Removal Plan for your Development to your Assistant Director for Property Management or Regional Property Manager no later than October 15th, annually. Maintain this plan in the Building Systems Inventory and post in the maintenance office. Refer to Chapter 14 for Snow Removal Plan guidelines.

The Property Manager or Maintenance Supervisor must fill out the *Snow/Ice Storm Personnel/Equipment/Material Data Sheet and Snow/Ice Removal Checklists* for EVERY snow/ice storm Form can be obtained in the Public P-Drive, SOP Appendices Folder. A copy of these documents must be kept on file at the site and a copy must be forwarded to your Program Maintenance Supervisor along with your overtime slips. PMS will review all documents for accuracy and forward a copy to the Landscape Coordinator [in a timely manner] to file in the Master File. These documents are tools to track and record all snow/ice removal activities. The data recorded on these documents will be used in the event that there is an insurance claim and/or we need to submit information to Federal Emergency Management Agency [FEMA] for major storm reimbursement costs.

As with other preventive maintenance activities, maintenance custodial activities must be included and tracked on your Annual Preventive Maintenance Plan – Schedule and Report form See S: FamEld Drive, SOP Master Building Systems Appendices for sample Annual PM Plan – Schedule and Report Form.

## 15.5 Trash Removal

### 15.5.1 Objective

To maintain trash collection areas, trash containers and trash enclosures in as clean a manner as possible, discouraging pest infestation. To identify necessary maintenance, repair and replacement of trash

containers, container covers and enclosures to maintain trash containers and enclosures in good working order.

### 15.5.2 Scheduled Activities

**Daily/Weekly**

Laborers/JGs and Resident Custodian Responsibilities

Inspect and maintain all trash areas daily. Dumpster/trash areas must be picked up and cleaned as one of the first tasks of each day. At least weekly, especially in the summer, dumpsters must be hosed down and deodorized. Any graffiti or hazards should be reported immediately to Management.

Manager/Maintenance Superintendent Responsibilities:

To inspect all dumpsters and trash collection areas during the weekly inspection walk-through of Buildings and Grounds. Dumpster contractors (who work for the City) are responsible for picking up any trash, which may fall out of the dumpster when it is dumped. They are also supposed to pick up any large items (furniture, etc) which are left next to the dumpster to be picked up. Managers and superintendents are responsible for monitoring compliance with these rules. You should notify Boston's Sanitation division of any problems, including missed pick-ups. The Program Services Coordinator will assist managers and superintendents who do not receive an adequate response from the City.

**Quarterly**

Manager/Maintenance Superintendent Responsibilities:

Perform quarterly inspections of all trash areas. Inspect and record the condition of each container, container covers and container enclosure. All deficiencies found during any inspection shall be transferred to work orders for correction as either emergency or Building and Grounds priorities. Trash areas should be baited to control pest infestation

**Annually**

Manager/Maintenance Superintendent Responsibilities:

Conduct a formal Dumpster Survey annually. A sample survey document can be obtained from the Public P-Drive, SOP Building Systems Appendices Folder All dumpsters should be painted annually. You should plan on replacing any dumpsters that are over 3-4 years old.

**As needed**

Manager/Maintenance Superintendent Responsibilities:

Replace covers as needed with plastic/fiberglass type covers. Make the necessary repairs as needed to insure that trash containers and enclosures are in good working order and meet standards expected.

### 15.5.3 Systems Inventory Information

A list of all dumpsters, sizes, ages, and locations shall be maintained in the building systems inventory binder. If the development uses compactors or other trash removal or storage systems this information shall be compiled and maintained in the Building Systems Inventory binder.

### 15.5.4 Service Records

Copies of all records of all trash preventive maintenance activities including all inspection checklists, services, repairs and replacements shall be filed in the annual Service Record Binder in the appropriate Section. Records of all preventive maintenance (P) work orders shall be filed in the annual Service Record Binder as well as the work order system files. Records of all preventive maintenance purchase orders shall be filed in the annual Service Record Binder as well as the purchase order system files

Keep a record of all Dumpster surveys and forward a copy to the Service Program Coordinator to file in the Master File.

As with other preventive maintenance activities, maintenance custodial activities must be included and tracked on your Annual Preventive Maintenance Plan – Schedule and Report form See S: FamEld Drive, SOP Master Building Systems Appendices for sample Annual PM Plan – Schedule and Report Form.

## 15.6 Pest Management

### 15.6.1 Objective:

To control pests in apartments, common areas, basements and grounds at all times.

### 15.6.2 Scheduled Activities:

**Daily/Weekly/Monthly**

Laborers/JGs and Resident Custodians Responsibilities

Daily inspection and cleanup of debris around dumpster areas, grounds, hallways, stairwells, common areas etc. will greatly contribute to your development plan of striving to attain pest free developments. Laborers/JGs/Resident Custodians shall report any evidence of pest activity to Manager/Superintendent. If an active rodent problem exists and a mapping of activity and placement of bait boxes is available, activity should be monitored by staff as well as the contractor and reported to Manager/Superintendent.

**Quarterly/Annually**

Manager/Maintenance Superintendent Responsibilities

Record any evidence of pest activity during any LUI inspection. Any pest activity observed must be added to the Focus list for apartments for contractor follow up.

All basements/crawl spaces, dumpsters/trash areas, common areas, grounds, etc. should be inspected quarterly for any pest activity. If a problem exists, add the area to the B&G focus list for contractor follow up.

**Annually**

Licensed Pest Applicators - Staff or Contractor:

Must bait all catch basins annually on a fixed schedule – usually in the end of June/early July for mosquito control as requested by Suffolk County Mosquito Control (SCMC). SCMC request that all catch basins treated are marked with traffic paint. The pesticide, marking paint and paint wands will be provided by them. The paint wands must be returned to SCMD after the treatments are completed.

**Annually**

Manager

Prepare bidding documents for IPM contract once yearly using only state contract vendors. Refer to www.commbuys.com *or the SOP appendices, Chapter 16 for the list of approved vendors. See Chapter 16 in the SOP manual and Chapter 16 in the SOP Appendices for the BHA IPM specification to bid the IPM contract and the procedure for the second year option.*

**As needed**

Manager/Maintenance Superintendent Responsibilities

To respond to any reports of pest activity in accordance with timelines and standards outlined in Chapter 16 and 18. The standard for Extermination Call Back work orders is 14 days. Adhere to the Vacancy Preparation Standards detailed in Chapter 20 which includes cleaning up of old pesticide baits, pests and pest evidence and harborage reduction through exclusion.

### 15.6.3 Service Records

All extermination activities performed by in-house staff must be tracked on work orders. Copies of all inspections, BHA or outside pest service records, reports, repair records, housekeeping citations etc. for all pest management related activities must be maintained in the annual service record binder in the appropriate section.

Records of all preventive maintenance (P) work orders (actual copies or work order reports) shall be filed in the annual Service Record Binder as well as the work order system files. Records of all preventive maintenance purchase orders for IPM shall be filed in the annual Service Record Binder as well as the purchase order system files. Pesticide service records whether they are from in-house activities or from an IPM contractor shall be filed in the annual Service Record Binder or an IPM/bed bug log book.

As with other preventive maintenance activities, maintenance custodial and pest control activities must be included and tracked on your Annual Preventive Maintenance Plan – Schedule and Report form See S: Fam/Eld Drive, SOP Master Building Systems Appendices for sample Annual PM Plan – Schedule and Report Form.

**Pest Control Service Record-keeping [From Chapter 16]**

**License Holder's Responsibility:**
In-house employees who perform pest control services on BHA property must maintain records of all pesticide usage by filling out the **BHA Pest Control Service Record form**. See, S:drive, SOP, SOP Appendices, Chapter 16 Pests and Mold, Pesticide Use Form for a copy of this form. The information recorded on these forms and proof of insurance from the Risk Management Department will be submitted to the State annually as part of the Pesticide Usage Reporting process. This is the responsibility of the licensed pesticide applicator. See S:drive, SOP, SOP Appendices, Chapter 16 - Pests and Mold for additional information on Pesticide Use Reporting to the State. In-house employees who perform pest control services on BHA property are required to keep a copy of each completed BHA Pest Control Service Record form for his/her own personal records and the reporting requirements. The report must include all pesticides used. Remember that products available to the general public must still be reported by the BHA licensed pesticide applicator such as Round Up for weed control. A copy must also be filed with the corresponding pest control work order and submitted to the Maintenance Superintendent to file. A copy of all service records for pesticide contractors' and in-house licensed employees' work at the BHA must be provided to the manager at the time of service and kept in a Service Record Binder or IPM/Bed bug log book.

**Manager/Maintenance Superintendent's Responsibility:**
The Property Manager or Maintenance Superintendent must insure that all pest control work orders have a Pest Control Service Record document attached. The Property Manager, Maintenance Superintendent or their designee must maintain copies of all pest control work orders and pest control service records.

**Program Maintenance Supervisor's Responsibility:**
The PMS should on a yearly basis, gather the pesticide usage reports for Mosquito or weed control from their pesticide applicators and forward to the Maintenance Systems Manager at the Building Services Office. He/she will copy them to the SOP Appendices for future reference and, in case, the pesticide applicator(s) misplaced any of their copies of the documentation needed for the state usage reporting process.
**Outside Contractor's Responsibility:**
Outside Pest Control Contractors can use the BHA Pest Control Service Form or may use an equivalent form developed by the Contractor. If the contractor chooses to use their own form, the BHA manager should review it and approve its content prior to the start of the contract.
All records of inspections/treatments shall be maintained in the Preventive Maintenance Annual Service Record Binder or IPM/Bed bug log books.

# PREVENTIVE MAINTENANCE SCHEDULE & report FORM (ART 1 - B UILDING SYSTEMS)

| Dev # | Develoment Name | Use P to denote when Task is Planned |
|---|---|---|
| 501 | WEST BROADWAY | |

| Refer to Chater in SO Manual | reventive Maintenance on Building Systems which includes: Inspecting - Testing - Cleaning - Servicing - Reair - Relacement | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Item: | Schd | Ar | May | June | July | Aug | Se | Oct | Nov | Dec | Jan | Feb | Mar |
| 26 - Electrical | Electrical Distribution Inspection | A | | | | | | | | P | | | | |
| | Battery Lights, visual Inspect. | W | Daily/Weekly Laborers/JGs/RC should note any obvious breakage and report immediately | | | | | | | | | | | |
| | Battery Lights Testing | M | P | P | P | P | P | P | P | P | P | P | P | P |
| | Battery Lights Testing (on B&G Inspections) | Q | Refer to your B&G Routine and Formal Inspection Schedules | | | | | | | | | | | |
| | Intercom Inspections on Annual LUI | A | Refer to LUI Schedule | | | | | | | | | | | |
| | Call-for Aid | A | | | | | | | | | P | | | |
| | Exterior Lights - visual Inspect. | W | Daily/Weekly Laborers/JGs/RC should note any obvious roblems and report immediately | | | | | | | | | | | |
| | Exterior Lights (on B&G Inspections) | Q | Refer to your B&G Routine and Formal Inspection Schedules | | | | | | | | | | | |
| | Exterior Lights -Nite Inspection | A | | P | | | | | | | | | | |
| | Exterior Lights -Servicing, coordinate with Boom Lift/Aerial Truck Schedule | AN | | | | | | | | | | | | |
| 28 - Fire Safety Systems | Fire Alarm Sys - Inspection | W | Daily/Weekly Laborers/JGs/RC/Mgr./Suer must Inspect master alarm anel check and report any roblems immediately | | | | | | | | | | | |
| | Fire Alarm Sys. Service Contractor (and Inspect on B&G Inspections) | Q | | | P | | | P | | | P | | | P |
| | Extinquishers -visual Inspect. | W | Daily/Weekly Laborers/JGs/RC/Mgr./Suer must check fired extinquishers and report any roblems immediately | | | | | | | | | | | |
| | Extinquishers (on B&G Inspections) | Q | Refer to B&G Schedule | | | | | | | | | | | |
| | Extinquishers serviced by outside contractor | A | | | | | | | | | | P | | |
| | Srinkler Systems | W | Daily/Weekly Laborers/JGs/RC shall conduct a visual Inspection and report any roblems immediately | | | | | | | | | | | |
| | Srinkler Systems Service Contract | A | | | | | | | | | | P | | |
| | Fire um Service Contractor | A | | | | | | | | | | | | P |
| | Smoke Detector-visual Inspect. | W | Daily/Weekly Laborers/JGs/RC shall conduct a visual Inspection and report any roblems immediately | | | | | | | | | | | |
| | Smoke Detector in Common Areas Inspection (on B&G Inspections) | Q | Refer to B&G Schedule | | | | | | | | | | | |
| | Smoke Detector testing & battery relacement | A | Refer to LUI Schedule | | | | | | | | | | | |
| | Smoke Hatch Inspect | W | Daily/Weekly Laborers/JGs/RC shall conduct a visual Inspection and report any roblems immediately | | | | | | | | | | | |
| | Smoke Hatch Inspect (on B&G Inspections) | Q | Refer to B&G Schedule | | | | | | | | | | | |
| | Smoke Hatch Service | A | N/A | | | | | | | | | | | |
| 31 - lumbing | Water Distribution System Inspect | M | P | P | P | P | P | P | P | P | P | P | P | P |
| | Water Distribution System Inspect(on LUI) | A | Refer to LUI Schedule | | | | | | | | | | | |
| | Water Distribution System Testing - by lumber | A | | | P | | | | | | | | | |
| | Vertical Drains - Clean/Check - lumber | A | | | P | | | | | | | | | |
| | Horiz Drains - Clean/Check - lumber | A | P | | | | | | | | | | | |
| | Back Flow reventers - Inspect by BWSC | A | | P | | | | | | | | | | |
| | Domestic Hotwater Sys - Inspect. | M | P | P | P | P | P | P | P | P | P | P | P | P |

D=Daily; W=Weekly; M=Monthly; Q=Quarterly; T-Three times per year; S=Semi-Annual; A=Annual AN=As Needed.
Indicate date Planned at beginning of each fiscal year by writing or typing P. Indicate actual Completed month by typing or writing C.

# PREVENTIVE MAINTENANCE SCHEDULE & report FORM (ART 1 - B UILDING SYSTEMS)

| Dev # | Develoment Name | Use P to denote when Task is Planned |
|---|---|---|
| 501 | WEST BROADWAY | |

| Refer to Chater in SO Manual | reventive Maintenance on Building Systems which includes: Inspecting - Testing - Cleaning - Servicing - Reair - Relacement | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Item: | Schd | Ar | May | June | July | Aug | Se | Oct | Nov | Dec | Jan | Feb | Mar |
| | Domestic Hotwater Sys - Inspect on LUI | A | Refer to LUI Schedule | | | | | | | | | | | |
| | Domestic Hotwater Sys - Drain & Flush by lumber | A | N/A | | | | | | | | | | | |
| 32 - Vent. & AC | Window A/C - Service | A | N/A | | | | | | | | | | | |
| | Roof To Exhaust Fan - Inspect. | Q | Refer to B&G Schedule | | | | | | | | | | | |
| | Roof To Exhaust Fan - Electrician | A | N/A | | | | | | | | | | | |
| | Boiler Rm. Makeu Air Unit. - by Fireman | A | N/A | | | | | | | | | | | |
| | Air handling Units/Common Area Ventiliation - by Mechanic | W/Q | Weekly/Quarterly Inspection - Laborers/JGs/RC/Mgrs/Suers should note any obvious roblems and report immediately | | | | | | | | | | | |
| | Air handling Units/Common Area Ventiliation - by Mechanic | A | N/A | | | | | | | | | | | |
| | Slit System AC & Heat ums - Inspect | W/Q | Weekly/Quarterly Inspection - Mgrs/Suers should note any obvious roblems and report immediately | | | | | | | | | | | |
| | Slit System AC & Heat ums - Contractor Service | A | | | | | | | | | | P | | |
| 33 - Roofs | Roofs - on Inspections | W/Q | Weekly/Quarterly Inspection - Laborers/JGs/RC/Mgrs/Suers should note any obvious roblems and report immediately | | | | | | | | | | | |
| | Roof - Inspection following rainstorm | Q | P | | | P | | | P | | | P | | |
| | Roofs - Inspect by roofing Crew | A | | P | | | | | | | | | | |
| 34 - Small Equiment & Skid Loaders | Landscae Equi. (Nov. - March) | A | P | | | | | | | | | | | |
| | Snow Removal Equi. (Aril - Oct.) | A | | | | | | | | P | P | P | P | P |
| | Skid Steel Ldr | T | P | | | | | | | | | | | |
| 35 - Vehicles & Trucks | pick-u/Rack Body Truck | D | Daily/uon each use - Truck Driver is resonsible for conducting a visual Inspection and check fluid every time truck is fueled. At each re-fueling, comlete the truck Inspection checklist. | | | | | | | | | | | |
| | pick-u/Rack Body Truck - by Garage | Q | | | P | | | P | | | P | | | P |

| Refer to Chapter in SOP Manual | Regular Custodial Maintenance subject to Preventive Maintenance | | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Item: | Schd | Apr | May | June | July | Aug | Sep | Oct | Nov | Dec | Jan | Feb | Mar |
| 11 - B&G (And Ch. 37) | Weekly Walk Through | D/W | Daily/Weekly Laborers/JGs/RC shall conduct a visual inspection and report any problems immediately | | | | | | | | | | | |
| | Monthly Walk through by Supers/Managers | M | Refer to B&G Routine Inspection Schedule | | | | | | | | | | | |
| | Formal Qrtly. Insp. On B&G Inspections | Q | Refer to Formal Quarterly B&G Schedules | | | | | | | | | | | |
| 12 - Hallway (and Ch. 37) | Weekly Walk Through | D/W | Daily/Weekly Laborers/JGs/RC shall conduct a visual inspection and report any problems immediately | | | | | | | | | | | |
| | Monthly Walk through by Supers/Managers | M | Refer to B&G Routine Inspection Schedule | | | | | | | | | | | |
| | Formal Qrtly. Insp. On B&G Inspections | Q | Refer to Formal Quarterly B&G Schedules | | | | | | | | | | | |
| 14 - Snow Removal Plan (and Ch. 37) | Annual Plan | A | | | | | | | P | | | | | |
| | Snow Removal | AN | | | | | | | | P | P | P | P | |
| 15 - Trash Removal (and Ch. 37) | Weekly Walk Through | D/W | Daily/Weekly Laborers/JGs/RC shall inspect & clean and report any problems immediately | | | | | | | | | | | |
| | Monthly Walk through by Supers/Managers | M | Refer to B&G Routine Inspection Schedule | | | | | | | | | | | |
| | Formal Qrtly. Insp. On B&G Inspections | Q | Refer to Formal Quarterly B&G Schedules | | | | | | | | | | | |

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Indicate date Planned at beginning of each fiscal year by writing or typing P. Indicate actual Completed month by typing or writing C.

# PREVENTIVE MAINTENANCE SCHEDULE & report FORM (ART 1 - B UILDING SYSTEMS)

| Dev # | Develoment Name | Use P to denote when Task is Planned |
|---|---|---|
| 501 | WEST BROADWAY | |

| Refer to Chater in SO Manual | reventive Maintenance on Building Systems which includes: Inspecting - Testing - Cleaning - Servicing - Reair - Relacement | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Item: | Schd | Ar | May | June | July | Aug | Se | Oct | Nov | Dec | Jan | Feb | Mar |
| | Annual Survey | A | P | | | | | | | | | | | |
| | Annual Plan | A | P | | | | | | | | | | | |
| 16 - Pest Management (And Ch. 37) | Inspect for Pest Activity during any inspection eg LUI Inspections and qrtly Inspections | W/Q/A | Daily/Weekly Laborers/JGs/RC shall report any pest activity immediately. Refer to B&G Inspection Schedule and LUI Inspection Schedule for Quarterly/Annual Inspections | | | | | | | | | | | |
| | Flush-Out (units that are not part of IPM Plan) | S | | | | | | | | | | | | |
| | Basement/crawl spaces Inspect | Q | | | P | | | P | | | P | | | P |
| | Bait Storm Drains - to control West Nile Virus | A | | | | P | | | | | | | | |
| | IPM | as per plan | P | P | P | P | P | P | P | P | P | P | P | P |
| 13 - Grounds & Landscape Care | Annual Landscape Maintenance Plan | A | Refer to Landscape Maintenance Calendar for Schedule | | | | | | | | | | | |
| | Spring Cleanup | A | | | | | | | | | | | | |
| | Mulching Planting areas | A | | | | | | | | | | | | |
| | Lawn Fertilization/Lime | A | | | | | | | | | | | | |
| | Lawn Weed Control | A | | | | | | | | | | | | |
| | Hardscape Weed Control | A & AN | | | | | | | | | | | | |
| | Lawn Grub Control | A/AN | | | | | | | | | | | | |
| | Lawn Aeration | A | | | | | | | | | | | | |
| | Lawn Overseeding | A | | | | | | | | | | | | |
| | Planting Bed Weed/Feed Control | W | | | | | | | | | | | | |
| | Planting Beed Weed Control | W | | | | | | | | | | | | |
| | Watering | W | | | | | | | | | | | | |
| | Lawn Mowing | W | | | | | | | | | | | | |
| | Fall Leaf Pick up & Removal | A | | | | | | | | | | | | |
| | Tree Inspections (with B&G Inspections) | W/Q | Daily/Weekly Laborers/JGs/RC shall conduct a visual inspection and report any problems immediately. Refer to B&G for formal quarterly inspection schedule | | | | | | | | | | | |
| | Tree Maintenance - as per plan | A & AN | Refer to Landscape Maintenance Calendar for Schedule | | | | | | | | | | | |
| | Shrub Inspection (with B&G Inspections) | W/Q | Daily/Weekly Laborers/JGs/RC shall conduct a visual inspection and report any problems immediately. Refer to B&G for formal quarterly inspection schedule | | | | | | | | | | | |
| | Shrub Maintenance - as per plan | A & AN | **Refer to Landscape Maintenance Calendar for Schedule** | | | | | | | | | | | |
| | Flower Planting | A or S | | | | | | | | | | | | |
| | Playground/Fence & Bench Inspect. | D/W | Daily/Weekly Laborers/JGs/RC shall conduct a visual inspection and report any problems immediately | | | | | | | | | | | |
| | Monthly Walk through by Supers/Managers | M | Refer to B&G Monthly Inspection Schedule | | | | | | | | | | | |
| | Replenish Fibar Mulch for playground surface | A/AN | P | | | | | | | | | | | |
| | Thorough Playground Inspection before school vacation. | A | P | | | | | | | | | | | |
| | Playground/Fence & Bench Formal Inspection (on B&G Inspections) | Q | Refer to Formal Quarterly B&G Schedules | | | | | | | | | | | |

| Heating System Description: Gas Fired System (Refer to SOP Manual Chapter 30) | | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Task: | Schd | Apr | May | June | July | Aug | Sep | Oct | Nov | Dec | Jan | Feb | Mar |
| Daily Service Activities | D | P | P | P | P | P | P | P | P | P | P | P | P |

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Indicate date Planned at beginning of each fiscal year by writing or typing P. Indicate actual Completed month by typing or writing C.

## PREVENTIVE MAINTENANCE SCHEDULE & report FORM (ART 1 - B UILDING SYSTEMS)

| Dev # | Develoment Name | Use P to denote when Task is Planned |
|---|---|---|
| 501 | WEST BROADWAY | |

| Refer to Chater in SO Manual | reventive Maintenance on Building Systems which includes: Inspecting - Testing - Cleaning - Servicing - Reair - Relacement | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Item: | Schd | Ar | May | June | July | Aug | Se | Oct | Nov | Dec | Jan | Feb | Mar |
| Weekly Service Activities | W | P | P | P | P | P | P | P | P | P | P | P | P | |
| Feed Pump | M | P | P | P | P | P | P | P | P | P | P | P | P | |
| Burner Motor | M | P | P | P | P | P | P | P | P | P | P | P | P | |
| Air Handler | M | P | P | P | P | P | P | P | P | P | P | P | P | |
| Circulating Pump | M | P | P | P | P | P | P | P | P | P | P | P | P | |
| Annual Cleaning | A | | | | | P | | | | | | | | |
| State Inspection | A | | | | | | P | | | | | | | |

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Indicate date planned at beginning of each fiscal year by writing or typing P Indicate actual Completed month by typing or writing C

D=Daily; W=Weekly; M=Monthly; Q=Quarterly; T-Three times per year; S=Semi-Annual; A=Annual AN=As Needed.
Indicate date Planned at beginning of each fiscal year by writing or typing P. Indicate actual Completed month by typing or writing C.

Boston Housing Authority
Standard Operating Procedures
Development Profile and Systems Inventory
HOUSING Progress

# PREVENTIVE MAINTENANCE SCHEDULE & REPORT FORM (PART 1 - BUILDING SYSTEMS)

| Dev # | Development Name |
|---|---|
| 505 | Fairmount |

**Use P to denote when Task is Planned**

| Refer to Chapter in SOP Manual | Preventive Maintenance on Building Systems which includes: Inspecting - Testing - Cleaning - Servicing - Repair - Replacement | | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Item: | Schd | Apr | May | June | July | Aug | Sep | Oct | Nov | Dec | Jan | Feb | Mar |
| 26 - Electrical | Electrical Distribution Inspection | A | P | | | | | | | | | | | |
| | Battery Lights, visual inspect. | W | Daily/Weekly Laborers/JGs/RC should note any obvious breakage and report immediately | | | | | | | | | | | |
| | Battery Lights Testing | M | P | P | P | P | P | P | P | P | P | P | P | P |
| | Battery Lights Testing (on B&G Inspections) | Q | Refer to your B&G Routine and Formal Inspection Schedules | | | | | | | | | | | |
| | Exterior Lights - visual inspect. | W | Daily/Weekly Laborers/JGs/RC should note any obvious problems and report immediately | | | | | | | | | | | |
| | Exterior Lights (on B&G Inspections) | Q | Refer to your B&G Routine and Formal Inspection Schedules | | | | | | | | | | | |
| | Exterior Lights -Nite Inspection | A | | | | | | P | | | | | | |
| | Exterior Lights -Servicing, coordinate with Boom Lift/Aerial Truck Schedule | AN | | | | | | | P | P | | | | |
| | Extinquishers -visual inspect. | W | Daily/Weekly Laborers/JGs/RC/Mgr./Super must check fired extinquishers and report any problems immediately | | | | | | | | | | | |
| | Extinquishers (on B&G Inspections) | Q | Refer to B&G Schedule | | | | | | | | | | | |
| | Extinquishers serviced by outside contractor | A | P | | | | | | | | | | | |
| | Smoke Detector-visual inspect. | W | Daily/Weekly Laborers/JGs/RC shall conduct a visual inspection and report any problems immediately | | | | | | | | | | | |
| | Smoke Detector in Common Areas Inspection (on B&G Inspections) | Q | Refer to B&G Schedule | | | | | | | | | | | |
| | Smoke Detector testing & battery replacement | A | Refer to LUI Schedule | | | | | | | | | | | |
| 31 - Plumbing | Water Distribution System Inspect | M | P | P | P | P | P | P | P | P | P | P | P | P |
| | Water Distribution System Inspect(on LUI) | A | Refer to LUI Schedule | | | | | | | | | | | |
| | Water Distribution System Testing - by Plumber | A | P | | | | | | | | | | | |
| | Vertical Drains - Clean/Check - Plumber | A | P | | | | | | | | | | | |
| | Horiz Drains - Clean/Check - Plumber | A | P | | | | | | | | | | | |
| | Domestic Hotwater Sys - Inspect. | M | P | P | P | P | P | P | P | P | P | P | P | P |
| | Domestic Hotwater Sys - Inspect on LUI | A | Refer to LUI Schedule | | | | | | | | | | | |
| | Domestic Hotwater Sys - Drain & Flush by Plumber | A | | | | | | | | | | | | P |
| 32 - Vent. & AC | Window A/C - Service | A | | P | | | | | | | | | | |
| 33 - Roofs | Roofs - on Inspections | W/Q | Weekly/Quarterly Inspection - Laborers/JGs/RC/Mgrs/Supers should note any obvious problems and report immediately | | | | | | | | | | | |
| | Roof - Inspection following rainstorm | Q | | | P | | | P | | | P | | | P |
| 34 - Small Equipment & Skid Loaders | Landscape Equip. (Nov. - March) | A | | | | | | | | | | | | P |
| | Snow Removal Equip. (April - Oct.) | A | | | | | | | P | | | | | |
| 35 - Vehicles & Trucks | Pick-up/Rack Body Truck | D | Daily/upon each use - Truck Driver is responsible for conducting a visual inspection and check fluid every time truck is fueled. At each re-fueling, complete the truck inspection checklist. | | | | | | | | | | | |
| | Pick-up/Rack Body Truck - by Garage | Q | | | P | | | P | | | P | | | P |

| Refer to Chapter in SOP Manual | Regular Custodial Maintenance subject to Preventive Maintenance | | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Item: | Schd | Apr | May | June | July | Aug | Sep | Oct | Nov | Dec | Jan | Feb | Mar |
| | Weekly Walk Through | D/W | Daily/Weekly Laborers/JGs/RC shall conduct a visual inspection and report any problems immediately | | | | | | | | | | | |

D=Daily; W=Weekly; M=Monthly; Q=Quarterly; T-Three times per year; S=Semi-Annual; A=Annual AN=As Needed.
Indicate date Planned at beginning of each fiscal year by writing or typing P. Indicate actual Completed month by typing or writing C.

Development Project and Systems Inventory
Work-in-Progress

# PREVENTIVE MAINTENANCE SCHEDULE & REPORT FORM (PART 1 - BUILDING SYSTEMS)

| Dev # | Development Name |
|---|---|
| 505 | Fairmount |

**Use P to denote when Task is Planned**

| Refer to Chapter in SOP Manual | Preventive Maintenance on Building Systems which includes: Inspecting - Testing - Cleaning - Servicing - Repair - Replacement | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Item: | Schd | Apr | May | June | July | Aug | Sep | Oct | Nov | Dec | Jan | Feb | Mar |
| 11 - B&G (And Ch. 37) | Monthly Walk through by Supers/Managers | M | Refer to B&G Routine Inspection Schedule | | | | | | | | | | | |
| | Formal Qrtly. Insp. On B&G Inspections | Q | Refer to Formal Quarterly B&G Schedules | | | | | | | | | | | |
| 12 - Hallway (and Ch. 37) | Weekly Walk Through | D/W | Daily/Weekly Laborers/JGs/RC shall conduct a visual inspection and report any problems immediately | | | | | | | | | | | |
| | Monthly Walk through by Supers/Managers | M | Refer to B&G Routine Inspection Schedule | | | | | | | | | | | |
| | Formal Qrtly. Insp. On B&G Inspections | Q | Refer to Formal Quarterly B&G Schedules | | | | | | | | | | | |
| 14 - Snow Removal Plan (and Ch. 37) | Annual Plan | A | | | | | | | P | | | | | |
| | Snow Removal | AN | | | | | | | | P | P | P | P | P |
| 15 - Trash Removal (and Ch. 37) | Weekly Walk Through | D/W | Daily/Weekly Laborers/JGs/RC shall inspect & clean and report any problems immediately | | | | | | | | | | | |
| | Monthly Walk through by Supers/Managers | M | Refer to B&G Routine Inspection Schedule | | | | | | | | | | | |
| | Formal Qrtly. Insp. On B&G Inspections | Q | Refer to Formal Quarterly B&G Schedules | | | | | | | | | | | |
| | Annual Survey | A | | | | | | | P | | | | | |
| 16 - Pest Management (And Ch. 37) | Annual Plan | A | | | | | | | | | | | | P |
| | Inspect for Pest Activity during any inspection eg LUI Inspections and qrtly Inspections | W/Q/A | Daily/Weekly Laborers/JGs/RC shall report any pest activity immediately. Refer to B&G Inspection Schedule and LUI Inspection Schedule for Quarterly/Annual Inspections | | | | | | | | | | | |
| | Flush-Out (units that are not part of IPM Plan) | S | | | | | | | | | | | | |
| | Basement/crawl spaces Inspect | Q | | | P | | | P | | | P | | | P |
| | Bait Storm Drains - to control West Nile Virus | A | | | | P | | | | | | | | |
| | IPM | as per plan | P | P | P | P | P | P | P | P | P | P | P | P |
| 13 - Grounds & Landscape Care | Annual Landscape Maintenance Plan | A | | | | | | | | | | | | P |
| | Spring Cleanup | A | P | | | | | | | | | | | |
| | Mulching Planting areas | A | P | | | | | | | | | | | |
| | Lawn Fertilization/Lime | A | Refer to Landscape Maintenance Calendar for Schedule | | | | | | | | | | | |
| | Lawn Weed Control | A | Refer to Landscape Maintenance Calendar for Schedule | | | | | | | | | | | |
| | Hardscape Weed Control | A & AN | Refer to Landscape Maintenance Calendar for Schedule | | | | | | | | | | | |
| | Lawn Grub Control | A/AN | Refer to Landscape Maintenance Calendar for Schedule | | | | | | | | | | | |
| | Lawn Aeration | A | Refer to Landscape Maintenance Calendar for Schedule | | | | | | | | | | | |
| | Lawn Overseeding | A | Refer to Landscape Maintenance Calendar for Schedule | | | | | | | | | | | |
| | Planting Bed Weed/Feed Control | P | P | P | P | P | P | P | P | P | P | P | P | P |
| | Planting Beed Weed Control | W | Refer to Landscape Maintenance Calendar for Schedule | | | | | | | | | | | |
| | Watering | W | Refer to Landscape Maintenance Calendar for Schedule | | | | | | | | | | | |
| | Lawn Mowing | W | Refer to Landscape Maintenance Calendar for Schedule | | | | | | | | | | | |
| | Fall Leaf Pick up & Removal | A | | | | | | | P | P | | | | |
| | Tree Inspections (with B&G Inspections) | W/Q | Daily/Weekly Laborers/JGs/RC shall conduct a visual inspection and report any problems immediately. Refer to B&G for formal quarterly inspection schedule | | | | | | | | | | | |
| | Tree Maintenance - as per plan | A & AN | Refer to Landscape Maintenance Calendar for Schedule | | | | | | | | | | | |
| | Shrub Inspection (with B&G Inspections) | W/Q | Daily/Weekly Laborers/JGs/RC shall conduct a visual inspection and report any problems immediately. Refer to B&G for formal quarterly inspection schedule | | | | | | | | | | | |
| | Shrub Maintenance - as per plan | A & AN | Refer to Landscape Maintenance Calendar for Schedule | | | | | | | | | | | |

D=Daily; W=Weekly; M=Monthly; Q=Quarterly; T-Three times per year; S=Semi-Annual; A=Annual AN=As Needed.
Indicate date Planned at beginning of each fiscal year by writing or typing P. Indicate actual Completed month by typing or writing C.

## PREVENTIVE MAINTENANCE SCHEDULE & REPORT FORM (PART 1 - BUILDING SYSTEMS)

| Dev # | Development Name |
|---|---|
| 505 | Fairmount |

Use P to denote when Task is Planned

| Refer to Chapter in SOP Manual | Preventive Maintenance on Building Systems which includes: Inspecting - Testing - Cleaning - Servicing - Repair - Replacement | | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Item: | Schd | Apr | May | June | July | Aug | Sep | Oct | Nov | Dec | Jan | Feb | Mar |
| | Flower Planting | A or S | Refer to Landscape Maintenance Calendar for Schedule | | | | | | | | | | | |
| | Basketball Court/Fence Inspect. | D/W | Daily/Weekly Laborers/JGs/RC shall conduct a visual inspection and report any problems immediately | | | | | | | | | | | |
| | Monthly Walk through by Supers/Managers | M | Refer to B&G Monthly Inspection Schedule | | | | | | | | | | | |
| | Basketball Court/Fence Formal Inspection (on B&G Inspections) | Q | Refer to Formal Quarterly B&G Schedules | | | | | | | | | | | |

| Heating System Description: Gas Fired System (Refer to SOP Manual Chapter 30) | | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Task: | Schd | Apr | May | June | July | Aug | Sep | Oct | Nov | Dec | Jan | Feb | Mar |
| Annual Cleaning and Filter Replacement | A | | | | | | P | | | | | | |

D = Daily; W = Weekly M = Monthly Q = Quarterly T = Three times per year S = Semi-Annual A = Annual AN = As Needed

D=Daily; W=Weekly; M=Monthly; Q=Quarterly; T-Three times per year; S=Semi-Annual; A=Annual AN=As Needed.
Indicate date Planned at beginning of each fiscal year by writing or typing P. Indicate actual Completed month by typing or writing C.

Boston Housing Authority
Standard Operating Procedures
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# PREVENTIVE MAINTENANCE SCHEDULE & REPORT FORM (PART 1 - BUILDING SYSTEMS)

| Dev # | Development Name | Name of person inputting data | Date of Input |
|---|---|---|---|
| 507 | ARCHDALE | | |

**Use P to denote when Task is Planned**
**Use C to denote when task is Completed**
**If task is completed when scheduled use P/C - REFER TO SAMPLE**

| Refer to Chapter in SOP Manual | Preventive Maintenance on Building Systems which includes: inspecting - Testing - Cleaning - Servicing - Repair - Replacement | | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Item: | Schd | Apr | May | June | July | Aug | Sep | Oct | Nov | Dec | Jan | Feb | Mar |
| 26 - Electrical | Electrical Distribution Inspection | A | | P | | | | P | | | | P | | |
| | Battery Lights, visual inspect. | W | Daily/Weekly Laborers/JGs/RC should note any obvious breakage and report immediately | | | | | | | | | | | |
| | Battery Lights Testing | M | P | P | P | P | P | P | P | P | P | P | P | P |
| | Battery Lights Testing (on B&G Inspections) | Q | Refer to your B&G Routine and Formal inspection Schedules | | | | | | | | | | | |
| | Intercom inspections on Annual LUI | A | Refer to LUI Schedule | | | | | | | | | | | |
| | Exterior Lights - visual inspect. | W | Daily/Weekly Laborers/JGs/RC should note any obvious problems and report immediately | | | | | | | | | | | |
| | Exterior Lights (on B&G inspections) | Q | Refer to your B&G Routine and Formal inspection Schedules | | | | | | | | | | | |
| | Exterior Lights -Nite inspection | A | | | | | | | | | | | P | |
| | Exterior Lights -Servicing, coordinate with Boom Lift/Aerial Truck Schedule | AN | P | | | | | | | | | | | P |
| 28 - Fire Safety Systems | Fire Alarm Sys - inspection | W | Daily/Weekly Laborers/JGs/RC/Mgr./Super must inspect master alarm panel check and report any problems immediately | | | | | | | | | | | |
| | Fire Alarm Sys. Service Contractor (and inspect on B&G inspections) | Q | | | P | | | P | | | P | | | P |
| | Extinquishers -visual inspect. | W | Daily/Weekly Laborers/JGs/RC/Mgr./Super must check fired extinquishers and report any problems immediately | | | | | | | | | | | |
| | Extinquishers (on B&G inspections) | Q | Refer to B&G Schedule | | | | | | | | | | | |
| | Extinquishers serviced by outside contractor | A | | P | | | | | | | | | | |
| | Smoke Detector-visual inspect. | W | Daily/Weekly Laborers/JGs/RC shall conduct a visual inspection and report any problems immediately | | | | | | | | | | | |
| | Smoke Detector in Common Areas Inspection (on B&G inspections) | Q | Refer to B&G Schedule | | | | | | | | | | | |
| | Smoke Detector testing & battery replacement | A | Refer to LUI Schedule | | | | | | | | | | | |
| 31 -Plumbing | Water Distribution System inspect | M | P | P | P | P | P | P | P | P | P | P | P | P |
| | Water Distribution System inspect(on LUI) | A | Refer to LUI Schedule | | | | | | | | | | | |
| | Water Distribution System Testing - by plumber | A | | P | | | | P | | P | | | | |
| | Vertical Drains - Clean/Check - plumber | A | | P | | | | P | | P | | | | |
| | Horiz Drains - Clean/Check - plumber | A | | P | | | | P | | P | | | | |
| | Back Flow preventers - inspect by BWSC | A | | | | | | | | | | | | P |
| | Domestic Hotwater Sys - inspect. | M | | P | | | | P | | P | | | | |
| | Domestic Hotwater Sys - inspect on LUI | A | Refer to LUI Schedule | | | | | | | | | | | |
| 32 - Vent. & AC | Window A/C - Service | A | | P | | | | | | | | | | |
| | Boiler Rm. Makeup Air Unit. - | A | | | | | P | | | | | | | |
| 33 - Roofs | Roofs - on inspections | W/Q | Weekly/Quarterly inspection - Laborers/JGs/RC/Mgrs/Supers should note any obvious problems and report immediately | | | | | | | | | | | |
| | Roof - inspection following rainstorm | Q | | P | | | | P | | P | | | | |
| 34 - Small Equipment & Skid Loaders | Landscape Equip. (Nov. - March) | A | | P | | | | | | | | | | |
| | Snow Removal Equip. (April - Oct.) | A | | | | | | | P | | | | | |
| | Skid Steel Ldr | A | | | | | | | P | | | | | |

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Boston Housing Authority
Standard Operating Procedures
Development Profile and Systems Inventory
Work in Progress

# PREVENTIVE MAINTENANCE SCHEDULE & REPORT FORM (PART 1 - BUILDING SYSTEMS)

| Dev # | Development Name | Name of person inputting data | Date of Input |
|---|---|---|---|
| 507 | ARCHDALE | | |

**Use P to denote when Task is Planned**
**Use C to denote when task is Completed**
**If task is completed when scheduled use P/C - REFER TO SAMPLE**

| Refer to Chapter in SOP Manual | Preventive Maintenance on Building Systems which includes: inspecting - Testing - Cleaning - Servicing - Repair - Replacement | | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Item: | Schd | Apr | May | June | July | Aug | Sep | Oct | Nov | Dec | Jan | Feb | Mar |
| 35 - Vehicles & Trucks | Pick-up / Truck | D | Daily/upon each use - Truck Driver is responsible for conducting a visual inspection and check fluid every time truck is fueled. At each re-fueling, complete the truck inspection checklist. | | | | | | | | | | | |
| | Pick-up Truck - by Garage | Q | | P | | | P | | | P | | | P | |
| **Refer to Chapter in SOP Manual** | **Regular Custodial Maintenance subject to Preventive Maintenance** | | | | | | | | | | | | | |
| | **Item:** | **Schd** | **Apr** | **May** | **June** | **July** | **Aug** | **Sep** | **Oct** | **Nov** | **Dec** | **Jan** | **Feb** | **Mar** |
| 11 - B&G (And Ch. 37) | Weekly Walk Through | D/W | Daily/Weekly Laborers/JGs/RC shall conduct a visual inspection and report any problems immediately | | | | | | | | | | | |
| | Monthly Walk through by Supers/Managers | M | Refer to B&G Routine Inspection Schedule | | | | | | | | | | | |
| | Formal Qrtly. Insp. On B&G Inspections | Q | Refer to Formal Quarterly B&G Schedules | | | | | | | | | | | |
| 12 - Hallway (and Ch. 37) | Weekly Walk Through | D/W | Daily/Weekly Laborers/JGs/RC shall conduct a visual inspection and report any problems immediately | | | | | | | | | | | |
| | Monthly Walk through by Supers/Managers | M | Refer to B&G Routine Inspection Schedule | | | | | | | | | | | |
| | Formal Qrtly. Insp. On B&G Inspections | Q | Refer to Formal Quarterly B&G Schedules | | | | | | | | | | | |
| 14 - Snow Removal Plan (and Ch. 37) | Annual Plan | A | | | | | | | P | | | | | |
| | Snow Removal | AN | P | | | | | | | P | P | P | P | P |
| 15 - Trash Removal (and Ch. 37) | Weekly Walk Through | D/W | Daily/Weekly Laborers/JGs/RC shall inspect & clean and report any problems immediately | | | | | | | | | | | |
| | Monthly Walk through by Supers/Managers | M | Refer to B&G Routine Inspection Schedule | | | | | | | | | | | |
| | Formal Qrtly. Insp. On B&G Inspections | Q | Refer to Formal Quarterly B&G Schedules | | | | | | | | | | | |
| | Annual Survey | A | | | P | | | | | | | | | |
| 16 - Pest Management (And Ch. 37) | Annual Plan | A | | | | | | | | | | | | P |
| | Inspect for Pest Activity during any inspection eg LUI Inspections and qrtly Inspections | W/Q/A | Daily/Weekly Laborers/JGs/RC shall report any pest activity immediately. Refer to B&G Inspection Schedule and LUI Inspection Schedule for Quarterly/Annual Inspections | | | | | | | | | | | |
| | Bait Storm Drains - to control West Nile Virus | A | | | | p | | | | | | | | |
| | IPM | as per plan | P | P | P | P | P | P | P | P | P | P | P | P |
| 13 - Grounds & | Annual Landscape Maintenance Plan | A | Refer to Landscape Maintenance Calendar for Schedule | | | | | | | | | | | |
| | Spring Cleanup | A | Refer to Landscape Maintenance Calendar for Schedule | | | | | | | | | | | |
| | Mulching Planting areas | A | Refer to Landscape Maintenance Calendar for Schedule | | | | | | | | | | | |
| | Lawn Fertilization/Lime | A | Refer to Landscape Maintenance Calendar for Schedule | | | | | | | | | | | |
| | Lawn Weed Control | A | Refer to Landscape Maintenance Calendar for Schedule | | | | | | | | | | | |
| | Hardscape Weed Control | A & AN | Refer to Landscape Maintenance Calendar for Schedule | | | | | | | | | | | |
| | Lawn Grub Control | A/AN | Refer to Landscape Maintenance Calendar for Schedule | | | | | | | | | | | |
| | Lawn Aeration | A | Refer to Landscape Maintenance Calendar for Schedule | | | | | | | | | | | |
| | Lawn Overseeding | A | Refer to Landscape Maintenance Calendar for Schedule | | | | | | | | | | | |
| | Planting Bed Weed/Feed Control | W | Refer to Landscape Maintenance Calendar for Schedule | | | | | | | | | | | |
| | Planting Beed Weed Control | W | Refer to Landscape Maintenance Calendar for Schedule | | | | | | | | | | | |
| | Watering | W | Refer to Landscape Maintenance Calendar for Schedule | | | | | | | | | | | |
| | Lawn Mowing | W | Refer to Landscape Maintenance Calendar for Schedule | | | | | | | | | | | |
| | Fall Leaf Pick up & Removal | A | Refer to Landscape Maintenance Calendar for Schedule | | | | | | | | | | | |

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Indicate date Planned at beginning of each fiscal year by writing or typing P. Indicate actual Completed month by typing or writing C.

# PREVENTIVE MAINTENANCE SCHEDULE & REPORT FORM (PART 1 - BUILDING SYSTEMS)

| Dev # | Development Name | Name of person inputting data | Date of Input |
|---|---|---|---|
| 507 | ARCHDALE | | |

**Use P to denote when Task is Planned**
**Use C to denote when task is Completed**
**If task is completed when scheduled use P/C - REFER TO SAMPLE**

| Refer to Chapter in SOP Manual | Preventive Maintenance on Building Systems which includes: inspecting - Testing - Cleaning - Servicing - Repair - Replacement | | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Item: | Schd | Apr | May | June | July | Aug | Sep | Oct | Nov | Dec | Jan | Feb | Mar |
| Landscape Care | Tree Inspections (with B&G Inspections) | W/Q | Daily/Weekly Laborers/JGs/RC shall conduct a visual inspection and report any problems immediately. Refer to B&G for formal quarterly inspection schedule | | | | | | | | | | | |
| | Tree Maintenance - as per plan | A & AN | Refer to Landscape Maintenance Calendar for Schedule | | | | | | | | | | | |
| | Shrub Inspection (with B&G Inspections) | W/Q | Daily/Weekly Laborers/JGs/RC shall conduct a visual inspection and report any problems immediately. Refer to B&G for formal quarterly inspection schedule | | | | | | | | | | | |
| | Shrub Maintenance - as per plan | A & AN | Refer to Landscape Maintenance Calendar for Schedule | | | | | | | | | | | |
| | Flower Planting | A or S | Refer to Landscape Maintenance Calendar for Schedule | | | | | | | | | | | |
| | Playground/Fence & Bench Inspect. | D/W | Daily/Weekly Laborers/JGs/RC shall conduct a visual inspection and report any problems immediately | | | | | | | | | | | |
| | Monthly Walk through by Supers/Managers | M | Refer to B&G Monthly Inspection Schedule | | | | | | | | | | | |
| | Replenish Fibar Mulch for playground surface | A/AN | Refer to Landscape Maintenance Calendar for Schedule | | | | | | | | | | | |
| | Thorough Playground Inspection before school vacation. | A | Refer to Landscape Maintenance Calendar for Schedule | | | | | | | | | | | |
| | Playground/Fence & Bench Formal Inspection (on B&G Inspections) | Q | Refer to Formal Quarterly B&G Schedules | | | | | | | | | | | |

**Heating System Description: Gas Fired System (Refer to SOP Manual Chapter 30)**

| Task: | Schd | Apr | May | June | July | Aug | Sep | Oct | Nov | Dec | Jan | Feb | Mar |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Daily Service Activities | D | P | P | P | P | P | P | P | P | P | P | P | P |
| Weekly Service Activities | W | P | P | P | P | P | P | P | P | P | P | P | P |
| Feed Pump | M | P | P | P | P | P | P | P | P | P | P | P | P |
| Burner Motor | M | P | P | P | P | P | P | P | P | P | P | P | P |
| Air Handler | M | P | P | P | P | P | P | P | P | P | P | P | P |
| Circulating Pump | M | P | P | P | P | P | P | P | P | P | P | P | P |
| Annual Cleaning | A | | | | | P | | | | | | | |
| State Inspection | A | | | | | | P | | | | | | |

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# PREVENTIVE MAINTENANCE SCHEDULE & REPORT FORM (PART 1 - BUILDING SYSTEMS)

| Dev # | Development Name |
|---|---|
| 510 | Gallivan |

**Use P to denote when Task is Planned**

| Refer to Chapter in SOP Manual | Preventive Maintenance on Building Systems which includes: Inspecting - Testing - Cleaning - Servicing - Repair - Replacement | | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Item: | Schd | Apr | May | June | July | Aug | Sep | Oct | Nov | Dec | Jan | Feb | Mar |
| 26 - Electrical | Exterior Lights - visual inspect. | W | Daily/Weekly Laborers/JGs/RC should note any obvious problems and report immediately | | | | | | | | | | | |
| | Exterior Lights (on B&G Inspections) | Q | Refer to your B&G Routine and Formal Inspection Schedules | | | | | | | | | | | |
| | Exterior Lights -Nite Inspection | A | | | | | | | P | | | | | |
| 28 - Fire Safety Systems | Exterior Lights -Servicing, coordinate with Boom Lift/Aerial Truck Schedule | AN | | | | | | | | P | | | | |
| | Extinquishers -visual inspect. | W | Daily/Weekly Laborers/JGs/RC/Mgr./Super must check fired extinquishers and report any problems immediately | | | | | | | | | | | |
| | Extinquishers (on B&G Inspections) | Q | Refer to B&G Schedule | | | | | | | | | | | |
| | Extinquishers serviced by outside contractor | A | | | | | | | | P | | | | |
| | Smoke Detector-visual inspect. | W | Daily/Weekly Laborers/JGs/RC shall conduct a visual inspection and report any problems immediately | | | | | | | | | | | |
| | Smoke Detector testing & battery replacement | A | Refer to LUI Schedule | | | | | | | | | | | |
| | Horiz Drains - Check | A | Refer to LUI Schedule | | | | | | | | | | | |
| | Domestic Hotwater Sys - Inspect. | M | Refer to LUI Schedule | | | | | | | | | | | |
| | Domestic Hotwater Sys - Inspect on LUI | A | Refer to LUI Schedule | | | | | | | | | | | |
| 32 - Vent. & AC | Window A/C - Service | A | | P | | | | | | | | | | |
| 33 - Roofs | Roofs - on Inspections | W/Q | Weekly/Quarterly Inspection - Laborers/JGs/RC/Mgrs/Supers should note any obvious problems and report immediately | | | | | | | | | | | |
| 34 - Small Equipment & Skid Loaders | Landscape Equip. (Nov. - March) | A | P | | | | | | | | | | | |
| | Snow Removal Equip. (April - Oct.) | A | | | | | | | P | | | | | |
| | Skid Steel Ldr | T | | | | | | | P | | | | | |
| 35 - Vehicles & Trucks | Pick-up Truck | D | Daily/upon each use - Truck Driver is responsible for conducting a visual inspection and check fluid every time truck is fueled. At each re-fueling, complete the truck inspection checklist. | | | | | | | | | | | |
| | Pick-up Truck - by Garage | ? | | | | | | | | | P | | | |
| **Refer to Chapter in SOP Manual** | **Regular Custodial Maintenance subject to Preventive Maintenance** | | | | | | | | | | | | | |
| | **Item:** | **Schd** | **Apr** | **May** | **June** | **July** | **Aug** | **Sep** | **Oct** | **Nov** | **Dec** | **Jan** | **Feb** | **Mar** |
| 11 - B&G (And Ch. 37) | Weekly Walk Through | D/W | Daily/Weekly Laborers/JGs/RC shall conduct a visual inspection and report any problems immediately | | | | | | | | | | | |
| | Monthly Walk through by Supers/Managers | M | Refer to B&G Routine Inspection Schedule | | | | | | | | | | | |
| | Formal Qrtly. Insp. On B&G Inspections | Q | Refer to Formal Quarterly B&G Schedules | | | | | | | | | | | |
| 12 - Hallway (and Ch. 37) | Weekly Walk Through | D/W | Daily/Weekly Laborers/JGs/RC shall conduct a visual inspection and report any problems immediately | | | | | | | | | | | |
| | Monthly Walk through by Supers/Managers | M | Refer to B&G Routine Inspection Schedule | | | | | | | | | | | |
| | Formal Qrtly. Insp. On B&G Inspections | Q | Refer to Formal Quarterly B&G Schedules | | | | | | | | | | | |
| 14 - Snow Removal Plan (and Ch. 37) | Annual Plan | A | | | | | | | P | | | | | |
| | Snow Removal | AN | | | | | | | | P | P | P | P | P |
| 15 - Trash Removal (and Ch. | Weekly Walk Through | D/W | Daily/Weekly Laborers/JGs/RC shall inspect & clean and report any problems immediately | | | | | | | | | | | |
| | Monthly Walk through by Supers/Managers | M | Refer to B&G Routine Inspection Schedule | | | | | | | | | | | |

D=Daily; W=Weekly; M=Monthly; Q=Quarterly; T-Three times per year; S=Semi-Annual; A=Annual AN=As Needed.
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# PREVENTIVE MAINTENANCE SCHEDULE & REPORT FORM (PART 1 - BUILDING SYSTEMS)

| Dev # | Development Name |
|---|---|
| 510 | Gallivan |

**Use P to denote when Task is Planned**

| Refer to Chapter in SOP Manual | Preventive Maintenance on Building Systems which includes: Inspecting - Testing - Cleaning - Servicing - Repair - Replacement | | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Item: | Schd | Apr | May | June | July | Aug | Sep | Oct | Nov | Dec | Jan | Feb | Mar |
| 37) | Formal Qrtly. Insp. On B&G Inspections | Q | Refer to Formal Quarterly B&G Schedules | | | | | | | | | | | |
| | Annual Survey | A | | | | | | | P | | | | | |
| 16 - Pest Management (And Ch. 37) | Annual Plan | A | | | | | | | | | | | | P |
| | Inspect for Pest Activity during any inspection eg LUI Inspections and qrtly Inspections | W/Q/A | Daily/Weekly Laborers/JGs/RC shall report any pest activity immediately. Refer to B&G Inspection Schedule and LUI Inspection Schedule for Quarterly/Annual Inspections | | | | | | | | | | | |
| | Bait Storm Drains - to control West Nile Virus | A | | | | P | | | | | | | | |
| | IPM | as per plan | P | P | P | P | P | P | P | P | P | P | P | P |
| 13 - Grounds & Landscape Care | Annual Landscape Maintenance Plan | A | P | | | | | | | | | | | |
| | Spring Cleanup | A | P | P | | | | | | | | | | |
| | Mulching Planting areas | A | | P | | | | | | | | | | |
| | Hardscape Weed Control | A & AN | | | | P | P | | | | | | | |
| | Planting Beed Weed Control | W | Refer to Landscape Maintenance Calendar for Schedule | | | | | | | | | | | |
| | Watering | W | Refer to Landscape Maintenance Calendar for Schedule | | | | | | | | | | | |
| | Lawn Mowing | W | Refer to Landscape Maintenance Calendar for Schedule | | | | | | | | | | | |
| | Fall Leaf Pick up & Removal | A | | | | | | | P | P | P | | | |
| | Tree Inspections (with B&G Inspections) | W/Q | Daily/Weekly Laborers/JGs/RC shall conduct a visual inspection and report any problems immediately. Refer to B&G for formal quarterly inspection schedule | | | | | | | | | | | |
| | Tree Maintenance - as per plan | every other year | | | | | | | | | | | | |
| | Shrub Inspection (with B&G Inspections) | W/Q | Daily/Weekly Laborers/JGs/RC shall conduct a visual inspection and report any problems immediately. Refer to B&G for formal quarterly inspection schedule | | | | | | | | | | | |
| | Flower Planting | A or S | | P | | | | P | | | | | | |
| | Fence Inspection | D/W | Daily/Weekly Laborers/JGs/RC shall conduct a visual inspection and report any problems immediately | | | | | | | | | | | |
| | Monthly Walk through by Supers/Managers | M | Refer to B&G Monthly Inspection Schedule | | | | | | | | | | | |
| | Fence Formal Inspection (on B&G Inspections) | Q | Refer to Formal Quarterly B&G Schedules | | | | | | | | | | | |

**Heating System Description: Gas Fired System (Refer to SOP Manual Chapter 30)**

| Task: | Schd | Apr | May | June | July | Aug | Sep | Oct | Nov | Dec | Jan | Feb | Mar |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **Annual Cleaning and Inspection** | **A** | | | | P | P | P | | | | | | |

D = Daily; W = Weekly M = Monthly Q = Quarterly T = Three times per year S = Semi-Annual A = Annual AN = As Needed

D=Daily; W=Weekly; M=Monthly; Q=Quarterly; T-Three times per year; S=Semi-Annual; A=Annual AN=As Needed.
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# PREVENTIVE MAINTENANCE SCHEDULE & REPORT FORM (PART 1 - BUILDING SYSTEMS)

| Dev # | Development Name |
|---|---|
| 512 | South Street |

**Use P to denote when Task is Planned**

| Refer to Chapter in SOP Manual | Preventive Maintenance on Building Systems which includes: inspecting - Testing - Cleaning - Servicing - Repair - Replacement | | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Item: | Schd | Apr | May | June | July | Aug | Sep | Oct | Nov | Dec | Jan | Feb | Mar |
| 26 - Electrical | Electrical Distribution Inspection | A | | C | | | | P | | | | P | | |
| | Battery Lights, visual inspect. | W | Daily/Weekly Laborers/JGs/RC should note any obvious breakage and report immediately | | | | | | | | | | | |
| | Battery Lights Testing | M | C | C | C | C | C | P | P | P | P | P | P | P |
| | Battery Lights Testing (on B&G Inspections) | Q | Refer to your B&G Routine and Formal inspection Schedules | | | | | | | | | | | |
| | Intercom inspections on Annual LUI | A | Refer to LUI Schedule | | | | | | | | | | | |
| | Exterior Lights - visual inspect. | W | Daily/Weekly Laborers/JGs/RC should note any obvious problems and report immediately | | | | | | | | | | | |
| | Exterior Lights (on B&G inspections) | Q | Refer to your B&G Routine and Formal inspection Schedules | | | | | | | | | | | |
| | Exterior Lights -Nite inspection | A | | | | | | | | | | | P | |
| | Exterior Lights -Servicing, coordinate with Boom Lift/Aerial Truck Schedule | AN | | | | | | | | | | | | P |
| 28 - Fire Safety Systems | Fire Alarm Sys - inspection | W | Daily/Weekly Laborers/JGs/RC/Mgr./Super must inspect master alarm panel check and report any problems immediately | | | | | | | | | | | |
| | Fire Alarm Sys. Service Contractor (and inspect on B&G inspections) | Q | | | P | | | P | | | P | | | P |
| | Extinquishers -visual inspect. | W | Daily/Weekly Laborers/JGs/RC/Mgr./Super must check fired extinquishers and report any problems immediately | | | | | | | | | | | |
| | Extinquishers (on B&G inspections) | Q | Refer to B&G Schedule | | | | | | | | | | | |
| | Extinquishers serviced by outside contractor | A | | | | | | P | | | | | | |
| | Smoke Detector-visual inspect. | W | Daily/Weekly Laborers/JGs/RC shall conduct a visual inspection and report any problems immediately | | | | | | | | | | | |
| | Smoke Detector in Common Areas inspection (on B&G inspections) | Q | Refer to B&G Schedule | | | | | | | | | | | |
| | Smoke Detector testing & battery replacement | A | Refer to LUI Schedule | | | | | | | | | | | |
| 31 -Plumbing | Water Distribution System inspect | M | P | P | P | P | P | P | P | P | P | P | P | P |
| | Water Distribution System inspect(on LUI) | A | Refer to LUI Schedule | | | | | | | | | | | |
| | Water Distribution System Testing - by plumber | A | | P | | | | P | | P | | | | |
| | Vertical Drains - Clean/Check - plumber | A | | P | | | | P | | P | | | | |
| | Horiz Drains - Clean/Check - plumber | A | | P | | | | P | | P | | | | |
| | Back Flow preventers - inspect by BWSC | A | | | | | | | | | | | | P |
| | Domestic Hotwater Sys - inspect. | M | P | P | P | P | P | P | P | P | P | P | P | P |
| | Domestic Hotwater Sys - inspect on LUI | A | Refer to LUI Schedule | | | | | | | | | | | |
| 32 - Vent. & AC | Window A/C - Service | A | | P | | | | | | | | | | |
| | Boiler Rm. Makeup Air Unit. - | A | | | | | P | | | | | | | |
| 33 - Roofs | Roofs - on inspections | W/Q | Weekly/Quarterly inspection - Laborers/JGs/RC/Mgrs/Supers should note any obvious problems and report immediately | | | | | | | | | | | |
| | Roof - inspection following rainstorm | Q | | P | | | | P | | P | | | | |
| 34 - Small | Landscape Equip. (Nov. - March) | A | | P | | | | | | | | | | |

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Indicate date Planned at beginning of each fiscal year by writing or typing P. Indicate actual Completed month by typing or writing C.

Boston Housing Authority
Standard Operating Procedures
Development Profile and Systems Inventory
Work-In-Progress

# PREVENTIVE MAINTENANCE SCHEDULE & REPORT FORM (PART 1 - BUILDING SYSTEMS)

| Dev # | Development Name |
|---|---|
| 512 | South Street |

**Use P to denote when Task is Planned**

| Refer to Chapter in SOP Manual | Preventive Maintenance on Building Systems which includes: inspecting - Testing - Cleaning - Servicing - Repair - Replacement | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Item: | Schd | Apr | May | June | July | Aug | Sep | Oct | Nov | Dec | Jan | Feb | Mar |
| Equipment & Skid Loaders | Snow Removal Equip. (April - Oct.) | A | | | | | P | | P | | | | | |
| | Skid Steel Ldr | A | | | | | P | | P | | | | | |
| 35 - Vehicles & Trucks | Pick-up / Truck | D | Daily/upon each use - Truck Driver is responsible for conducting a visual inspection and check fluid every time truck is fueled. At each re-fueling, complete the truck inspection checklist. | | | | | | | | | | | |
| | Pick-up Truck - by Garage | Q | | P | | | P | | | P | | | P | |
| **Refer to Chapter in SOP Manual** | **Regular Custodial Maintenance subject to Preventive Maintenance** | | | | | | | | | | | | | |
| | **Item:** | **Schd** | **Apr** | **May** | **June** | **July** | **Aug** | **Sep** | **Oct** | **Nov** | **Dec** | **Jan** | **Feb** | **Mar** |
| 11 - B&G (And Ch. 37) | Weekly Walk Through | D/W | Daily/Weekly Laborers/JGs/RC shall conduct a visual inspection and report any problems immediately | | | | | | | | | | | |
| | Monthly Walk through by Supers/Managers | M | Refer to B&G Routine Inspection Schedule | | | | | | | | | | | |
| | Formal Qrtly. Insp. On B&G Inspections | Q | Refer to Formal Quarterly B&G Schedules | | | | | | | | | | | |
| 12 - Hallway (and Ch. 37) | Weekly Walk Through | D/W | Daily/Weekly Laborers/JGs/RC shall conduct a visual inspection and report any problems immediately | | | | | | | | | | | |
| | Monthly Walk through by Supers/Managers | M | Refer to B&G Routine Inspection Schedule | | | | | | | | | | | |
| | Formal Qrtly. Insp. On B&G Inspections | Q | Refer to Formal Quarterly B&G Schedules | | | | | | | | | | | |
| 14 - Snow Removal Plan (and Ch. 37) | Annual Plan | A | | | | | | | P | | | | | |
| | Snow Removal | AN | | | | | | | | P | P | P | P | P |
| 15 - Trash Removal (and Ch. 37) | Weekly Walk Through | D/W | Daily/Weekly Laborers/JGs/RC shall inspect & clean and report any problems immediately | | | | | | | | | | | |
| | Monthly Walk through by Supers/Managers | M | Refer to B&G Routine Inspection Schedule | | | | | | | | | | | |
| | Formal Qrtly. Insp. On B&G Inspections | Q | Refer to Formal Quarterly B&G Schedules | | | | | | | | | | | |
| | Annual Survey | A | | | P | | | | | | | | | |
| 16 - Pest Management (And Ch. 37) | Annual Plan | A | | | | | | | | | | | | P |
| | Inspect for Pest Activity during any inspection eg LUI Inspections and qrtly Inspections | W/Q/A | Daily/Weekly Laborers/JGs/RC shall report any pest activity immediately. Refer to B&G Inspection Schedule and LUI Inspection Schedule for Quarterly/Annual Inspections | | | | | | | | | | | |
| | Bait Storm Drains - to control West Nile Virus | A | | | | P | | | | | | | | |
| | IPM | as per plan | P | P | P | P | P | P | P | P | P | P | P | P |
| | Annual Landscape Maintenance Plan | A | Refer to Landscape Maintenance Calendar for Schedule | | | | | | | | | | | |
| | Spring Cleanup | A | Refer to Landscape Maintenance Calendar for Schedule | | | | | | | | | | | |
| | Mulching Planting areas | A | Refer to Landscape Maintenance Calendar for Schedule | | | | | | | | | | | |
| | Lawn Fertilization/Lime | A | Refer to Landscape Maintenance Calendar for Schedule | | | | | | | | | | | |
| | Lawn Weed Control | A | Refer to Landscape Maintenance Calendar for Schedule | | | | | | | | | | | |
| | Hardscape Weed Control | A & AN | Refer to Landscape Maintenance Calendar for Schedule | | | | | | | | | | | |
| | Lawn Grub Control | A/AN | Refer to Landscape Maintenance Calendar for Schedule | | | | | | | | | | | |
| | Lawn Aeration | A | Refer to Landscape Maintenance Calendar for Schedule | | | | | | | | | | | |
| | Lawn Overseeding | A | Refer to Landscape Maintenance Calendar for Schedule | | | | | | | | | | | |

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Indicate date Planned at beginning of each fiscal year by writing or typing P. Indicate actual Completed month by typing or writing C.

# PREVENTIVE MAINTENANCE SCHEDULE & REPORT FORM (PART 1 - BUILDING SYSTEMS)

| Dev # | Development Name |
|---|---|
| 512 | South Street |

**Use P to denote when Task is Planned**

| Refer to Chapter in SOP Manual | Preventive Maintenance on Building Systems which includes: inspecting - Testing - Cleaning - Servicing - Repair - Replacement | | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Item: | Schd | Apr | May | June | July | Aug | Sep | Oct | Nov | Dec | Jan | Feb | Mar |
| 13 - Grounds & Landscape Care | Planting Bed Weed/Feed Control | W | Refer to Landscape Maintenance Calendar for Schedule | | | | | | | | | | | |
| | Planting Beed Weed Control | W | Refer to Landscape Maintenance Calendar for Schedule | | | | | | | | | | | |
| | Watering | W | Refer to Landscape Maintenance Calendar for Schedule | | | | | | | | | | | |
| | Lawn Mowing | W | Refer to Landscape Maintenance Calendar for Schedule | | | | | | | | | | | |
| | Fall Leaf Pick up & Removal | A | Refer to Landscape Maintenance Calendar for Schedule | | | | | | | | | | | |
| | Tree Inspections (with B&G Inspections) | W/Q | Daily/Weekly Laborers/JGs/RC shall conduct a visual inspection and report any problems immediately. Refer to B&G for formal quarterly inspection schedule | | | | | | | | | | | |
| | Tree Maintenance - as per plan | A & AN | Refer to Landscape Maintenance Calendar for Schedule | | | | | | | | | | | |
| | Shrub Inspection (with B&G Inspections) | W/Q | Daily/Weekly Laborers/JGs/RC shall conduct a visual inspection and report any problems immediately. Refer to B&G for formal quarterly inspection schedule | | | | | | | | | | | |
| | Shrub Maintenance - as per plan | A & AN | Refer to Landscape Maintenance Calendar for Schedule | | | | | | | | | | | |
| | Flower Planting | A or S | Refer to Landscape Maintenance Calendar for Schedule | | | | | | | | | | | |
| | Playground/Fence & Bench Inspect. | D/W | Daily/Weekly Laborers/JGs/RC shall conduct a visual inspection and report any problems immediately | | | | | | | | | | | |
| | Monthly Walk through by Supers/Managers | M | Refer to B&G Monthly Inspection Schedule | | | | | | | | | | | |
| | Replenish Fibar Mulch for playground surface | A/AN | Refer to Landscape Maintenance Calendar for Schedule | | | | | | | | | | | |
| | Thorough Playground Inspection before school vacation. | A | Refer to Landscape Maintenance Calendar for Schedule | | | | | | | | | | | |
| | Playground/Fence & Bench Formal Inspection (on B&G Inspections) | Q | Refer to Formal Quarterly B&G Schedules | | | | | | | | | | | |

| Heating System Description: Gas Fired System (Refer to SOP Manual Chapter 30) | | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Task: | Schd | Apr | May | June | July | Aug | Sep | Oct | Nov | Dec | Jan | Feb | Mar |
| Daily Service Activities | D | P | P | P | P | P | P | P | P | P | P | P | P |
| Weekly Service Activities | W | P | P | P | P | P | P | P | P | P | P | P | P |
| Feed Pump | M | P | P | P | P | P | P | P | P | P | P | P | P |
| Burner Motor | M | P | P | P | P | P | P | P | P | P | P | P | P |
| Air Handler | M | P | P | P | P | P | P | P | P | P | P | P | P |
| Circulating Pump | M | P | P | P | P | P | P | P | P | P | P | P | P |
| Annual Cleaning | A | | | | | | P | | | | | | |
| State Inspection | A | | | | | | P | | | | | | |

D = Daily; W = Weekly M = Monthly Q = Quarterly T = Three times per year S = Semi-Annual A = Annual AN = As Needed

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# PREVENTIVE MAINTENANCE SCHEDULE & REPORT FORM (PART 1 - BUILDING SYSTEMS)

| Dev # | Development Name |
|---|---|
| 603 | M.Powers |

**Use P to denote when Task is Planned**

| Refer to Chapter in SOP Manual | Preventive Maintenance on Building Systems which includes: Inspecting - Testing - Cleaning - Servicing - Repair - Replacement | | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Item: | Schd | Apr | May | June | July | Aug | Sep | Oct | Nov | Dec | Jan | Feb | Mar |
| | Battery Lights, visual inspect. | W | Daily/Weekly Laborers/JGs/RC should note any obvious breakage and report immediately | | | | | | | | | | | |
| | Battery Lights Testing | M | P | P | P | P | P | P | P | P | P | P | P | P |
| | Battery Lights Testing (on B&G Inspections) | Q | Refer to your B&G Routine and Formal Inspection Schedules | | | | | | | | | | | |
| | Intercom Inspections on Annual LUI | A | | | | | | | | P | | | | |
| | Exterior Lights - visual inspect. | W | Daily/Weekly Laborers/JGs/RC should note any obvious problems and report immediately | | | | | | | | | | | |
| | Exterior Lights (on B&G Inspections) | Q | | | P | | | P | | | P | | | P |
| 27 - Elevators | Elevators visual Inspect. | W | Daily/Weekly Laborers/JGs/RC should note any obvious breakage and report immediately | | | | | | | | | | | |
| | Elevators Service Contractor | M | P | P | P | P | P | P | P | P | P | P | P | P |
| | Elevator Inspection (on B&G Inspections) | Q | Refer to your B&G Routine and Formal Inspection Schedules | | | | | | | | | | | |
| | Elevators Service Contractor | A | P | | | | | | | | | | | |
| 28 - Fire Safety Systems | Fire Alarm Sys - inspection | W | Daily/Weekly Laborers/JGs/RC/Mgr./Super must inspect master alarm panel check and report any problems immediately | | | | | | | | | | | |
| | Fire Alarm Sys. Service Contractor (and Inspect on B&G Inspections) | Q | | | P | | | P | | | P | | | P |
| | Extinquishers -visual inspect. | W | Daily/Weekly Laborers/JGs/RC/Mgr./Super must check fired extinquishers and report any problems immediately | | | | | | | | | | | |
| | Extinquishers (on B&G Inspections) | Q | Refer to B&G Schedule | | | | | | | | | | | |
| | Extinquishers serviced by outside contractor | A | P | | | | | | | | | | | |
| | Sprinkler Systems | W | Daily/Weekly Laborers/JGs/RC shall conduct a visual inspection and report any problems immediately | | | | | | | | | | | |
| | Sprinkler Systems Service Contract | A | | | P | | | | | | | | | |
| | Fire Pump Service Contractor | A | | | P | | | | | | | | | |
| | Smoke Detector-visual inspect. | W | Daily/Weekly Laborers/JGs/RC shall conduct a visual inspection and report any problems immediately | | | | | | | | | | | |
| | Smoke Detector in Common Areas Inspection (on B&G Inspections) | Q | Refer to B&G Schedule | | | | | | | | | | | |
| | Smoke Detector testing & battery replacement | A | Refer to LUI Schedule | | | | | | | | | | | |

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Boston Housing Authority
Standard Operating Procedures
Development Profile and Systems Inventory
Work in Progress

# PREVENTIVE MAINTENANCE SCHEDULE & REPORT FORM (PART 1 - BUILDING SYSTEMS)

| Dev # | Development Name |
|---|---|
| 603 | M.Powers |

**Use P to denote when Task is Planned**

| Refer to Chapter in SOP Manual | Preventive Maintenance on Building Systems which includes: Inspecting - Testing - Cleaning - Servicing - Repair - Replacement | | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Item: | Schd | Apr | May | June | July | Aug | Sep | Oct | Nov | Dec | Jan | Feb | Mar |
| 29 - Generators | Generator Inspect | W | Weekly Mgr/Super is responsible for insuring that the Electrician performs weekly inspection and performs task on weekly service activity report. | | | | | | | | | | | |
| | Generator Inspect (on B&G Inspect) | Q | Refer to B&G Schedule | | | | | | | | | | | |
| | Generator Contractor Service | A | | | P | | | | | | | | | |
| 31 - Plumbing | Water Distribution System Inspect | M | P | P | P | P | P | P | P | P | P | P | P | P |
| | Vertical Drains - Clean/Check - Plumber | A | P | | | | | | | | | | | |
| | Horiz Drains - Clean/Check - Plumber | A | P | | | | | | | | | | | |
| | Back Flow Preventers - Inspect by BWSC | A | | | | | | | | | | | P | |
| | Domestic Hotwater Sys - Inspect. | M | P | P | P | P | P | P | P | P | P | P | P | P |
| | Domestic Hotwater Sys - Inspect on LUI | A | Refer to LUI Schedule | | | | | | | | | | | |
| | Domestic Hotwater Sys - Drain & Flush by Plumber | A | P | | | | | | | | | | | |
| 32 - Vent. & AC | Split System A/C - Service | A | | | P | | | | | | | | | |
| | Roof Top Exhaust Fan - Electrician | A | P | | | | | | | | | | | |
| 33 - Roofs | Roofs - on Inspections | S | Weekly/Quarterly Inspection - Laborers/JGs/RC/Mgrs/Supers should note any obvious problems and report immediately | | | | | | | | | | | |
| | Roof - Inspection following rainstorm | Q | | | P | | | P | | | P | | | P |
| 34 - Small Equipment & Skid Loaders | Landscape Equip. (Nov. - March) | A | | P | | | | | | | | | | |
| | Snow Removal Equip. (April - Oct.) | A | P | | | | | | | | | | | |
| | Skid Steel Ldr | T | P | | | | | | | | | | | |
| Refer to Chapter in SOP Manual | Regular Custodial Maintenance subject to Preventive Maintenance | | | | | | | | | | | | | |
| | Item: | Schd | Apr | May | June | July | Aug | Sep | Oct | Nov | Dec | Jan | Feb | Mar |
| 11 - B&G (And Ch. 37) | Weekly Walk Through | D/W | Daily/Weekly Laborers/JGs/RC shall conduct a visual inspection and report any problems immediately | | | | | | | | | | | |
| | Monthly Walk through by Supers/Managers | M | P | P | P | P | P | P | P | P | P | P | P | P |
| | Formal Qrtly. Insp. On B&G Inspections | Q | | | P | | | P | | | P | | | P |
| 12 - Hallway (and Ch. 37) | Weekly Walk Through | D/W | P | P | P | P | P | P | P | P | P | P | P | P |
| | Monthly Walk through by Supers/Managers | M | P | P | P | P | P | P | P | P | P | P | P | P |
| | Formal Qrtly. Insp. On B&G Inspections | Q | | | P | | | P | | | P | | | P |
| 14 - Snow Removal Plan (and Ch. 37) | Annual Plan | A | | | | | | | P | | | | | |
| | Snow Removal | AN | | | | | | | | P | P | P | P | P |
| 15 - Trash Removal (and Ch. 37) | Weekly Walk Through | D/W | P | P | P | P | P | P | P | P | P | P | P | P |
| | Monthly Walk through by Supers/Managers | M | P | P | P | P | P | P | P | P | P | P | P | P |
| | Formal Qrtly. Insp. On B&G Inspections | Q | | | P | | | P | | | P | | | P |
| | Annual Survey | A | P | | | | | | | | | | | |
| 16 - Pest Management (And | Annual Plan | A | P | | | | | | | | | | | |
| | Inspect for Pest Activity during any inspection eg LUI Inspections and qrtly Inspections | W/Q/A | Daily/Weekly Laborers/JGs/RC shall report any pest activity immediately. Refer to B&G Inspection Schedule and LUI Inspection Schedule for Quarterly/Annual Inspections | | | | | | | | | | | |

D=Daily; W=Weekly; M=Monthly; Q=Quarterly; T-Three times per year; S=Semi-Annual; A=Annual AN=As Needed.
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# PREVENTIVE MAINTENANCE SCHEDULE & REPORT FORM (PART 1 - BUILDING SYSTEMS)

| Dev # | Development Name |
|---|---|
| 603 | M.Powers |

**Use P to denote when Task is Planned**

| Refer to Chapter in SOP Manual | Preventive Maintenance on Building Systems which includes: Inspecting - Testing - Cleaning - Servicing - Repair - Replacement | | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Item: | Schd | Apr | May | June | July | Aug | Sep | Oct | Nov | Dec | Jan | Feb | Mar |
| Ch. 37) | Flush-Out (units that are not part of IPM Plan) | S | | | | | | | | | | | | |
| | IPM | as per plan | P | P | P | P | P | P | P | P | P | P | P | P |
| 13 - Grounds & Landscape Care | Annual Landscape Maintenance Plan | A | P | | | | | | | | | | | |
| | Lawn Weed Control | A | Refer to Landscape Maintenance Calendar for Schedule | | | | | | | | | | | |
| | Hardscape Weed Control | A & AN | Refer to Landscape Maintenance Calendar for Schedule | | | | | | | | | | | |
| | Lawn Grub Control | A/AN | Refer to Landscape Maintenance Calendar for Schedule | | | | | | | | | | | |
| | Planting Beed Weed Control | W | Refer to Landscape Maintenance Calendar for Schedule | | | | | | | | | | | |
| | Watering | W | Refer to Landscape Maintenance Calendar for Schedule | | | | | | | | | | | |
| | Lawn Mowing | W | Refer to Landscape Maintenance Calendar for Schedule | | | | | | | | | | | |
| | Fall Leaf Pick up & Removal | A | | | | | | | P | P | | | | |
| | Shrub Inspection (with B&G Inspections) | W/Q | Daily/Weekly Laborers/JGs/RC shall conduct a visual inspection and report any problems immediately. Refer to B&G for formal quarterly inspection schedule | | | | | | | | | | | |
| | Monthly Walk through by Supers/Managers | M | Refer to B&G Monthly Inspection Schedule | | | | | | | | | | | |

**Heating System Description: Gas Fired System (Refer to SOP Manual Chapter 30)**

| Task: | Schd | Apr | May | June | July | Aug | Sep | Oct | Nov | Dec | Jan | Feb | Mar |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Daily Service Activities | D | P | P | P | P | P | P | P | P | P | P | P | P |
| Weekly Service Activities | W | P | P | P | P | P | P | P | P | P | P | P | P |
| Feed Pump | M | P | P | P | P | P | P | P | P | P | P | P | P |
| Burner Motor | M | P | P | P | P | P | P | P | P | P | P | P | P |
| Air Handler | M | P | P | P | P | P | P | P | P | P | P | P | P |
| Circulating Pump | M | P | P | P | P | P | P | P | P | P | P | P | P |
| Annual Cleaning | A | | | P | | | | | | | | | |
| State Inspection | A | | | | P | | | | | | | | |

D = Daily; W = Weekly M = Monthly Q = Quarterly T = Three times per year S = Semi-Annual A = Annual AN = As Needed

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The Boston Housing Authority classifies outstanding non-emergency tasks as deferred if they will take more than fourteen (14) days to complete. This is done for one or more of the following reasons:

1. **Items Best Completed When Unit is Vacant**
    - Example: A unit should have its heating pipes replaced, or heat and smoke detectors hard wired, or electrical service upgraded. Any of these items for one unit would likely be too small a project to be added to CIP but should be done when the unit becomes vacant. They would be added to the Deferred Maintenance Plan and then completed when the unit becomes vacant.
2. **Seasonal Items are items that cannot be completed because of the season.**
    - Example: Tree and shrub trimming would not be done while there is snow on the ground. This would be added to the Deferred Maintenance Plan and completed when the season permits.
3. **Lack of Funding**
    - Example: During an inspection, the property manager noticed that the common hallway needs to be repainted. Because of a severe winter, the operating budget does not have sufficient funds to complete all the necessary painting at this time. The item is categorized as deferred and completed when funds are available and staff are able to address the need.
4. **Efficiency – Items can be grouped together by location, task or trade**
    - Example: A plumber is required to repair 10 leaking diverter valves, discovered during inspections. It is more efficient to group these work orders together for the plumber. These work orders would be deferred until the plumber can be scheduled to do them all at once.
5. **Competing Priorities/Staff Availability**
    - Example: In the event the BHA experiences a large increase in vacancies in a short period of time and all available maintenance staff are required to focus on turning over vacant units to be available for applicants, BHA may defer non-emergency work that does not compromise health, safety, or the quality of life of the resident population.
6. **Delays Due to Stock/Parts Availability or Procurement Requirements**
    - Example: If the BHA had a need to replace rare parts or components not locally available to make required repairs to a particular system or component, those parts might have to be produced by a manufacturer and shipped from a distance in order to complete the necessary repairs. Or, a situation may arise that requires maintenance or engineering service that BHA may not have on staff. Depending on the estimated cost and type of work required, it may be necessary to complete a procurement process that may result in the work being completed in more than 14 days.

**Note: Emergency Life & Safety Items and Vacant Work:** If the deficiency is a life or safety hazard, it will **not** be moved to a Deferred Maintenance list. Emergency repairs are BHA's top maintenance priority and must be repaired or abated within 24 hours.

Vacant work orders are also excluded from this category, as the BHA auto-generates a number of routine and standardized turnover tasks upon move-out. Some of these tasks require other work to be

done before it can proceed. For example, painting cannot be done until any necessary plastering is completed, as well as taping and any other repairs required in order to ensure a clean finish.

Currently (10/19/26), there are only twelve (12) non-emergency and non-vacancy work orders that have been open for more than 14 days across the BHA's 1,900 unit state public housing portfolio.

| Unit/Bldg | Request Date | Problem Description: |
|---|---|---|
| Unit | 08/20/2026 | Bathroom radiator leak |
| Unit | 08/26/2026 | Repair bathroom heating unit |
| Unit | 09/03/2026 | Exterminate pests |
| Unit | 09/16/2026 | Repair basement door |
| Unit | 09/21/2026 | Exterminate pests |
| Unit | 09/21/2026 | Exterminate pests |
| Bldg | 09/22/2026 | Light out outside building |
| Unit | 09/23/2026 | Repair kitchen receptacle and replace range hood |
| Unit | 09/23/2026 | Install cabinet door and replace screen door |
| Unit | 09/29/2026 | Re-glaze tub |
| Unit | 09/30/2026 | Closet ceiling leaks when it rains |
| Unit | 10/01/2026 | Re-glaze tub |

## Annual 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 3/31/2026. It also shows the approved budget for the current year (2027) 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 Executive Office of Housing and Livable Communities (EOHLC). 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 EOHLC 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 EOHLC.

EOHLC 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 EOHLC 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 EOHLC and obtain its approval.

The BOSTON HOUSING AUTHORITY operating reserve at the end of fiscal year 2026 was $931,916.00, which is 4.48% 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 BOSTON HOUSING AUTHORITY | | | | | | |
|---|---|---|---|---|---|---|
| **REVENUE** | | | | | | |
| Account Number | Account Class | 2026 Approved Revenue Budget | 2026 Actual Amounts Received | 2027 Approved Revenue Budget | % Change from 2026 Actual to 2027 Budget | 2027 Dollars Budgeted Per Unit per Month |
| 3110 | Shelter Rent | 10,796,302.00 | 11,130,556.00 | 11,241,949.00 | 1.00% | 485.91 |
| 3111 | Shelter Rent - Tenants - Fraud/Retroactive | 0.00 | 0.00 | 0.00 | 0.00% | 0.00 |
| 3115 | Shelter Rent - Section 8 | 0.00 | 0.00 | 0.00 | 0.00% | 0.00 |
| 3190 | Non-Dwelling Rentals | 0.00 | 0.00 | 0.00 | 0.00% | 0.00 |
| 3400 | Administrative Fee - MRVP/AHVP | 0.00 | 0.00 | 0.00 | 0.00% | 0.00 |
| 3610 | Interest on Investments - Unrestricted | 960,604.00 | 184,359.00 | 1,170,819.00 | 535.07% | 50.61 |
| 3611 | Interest on Investments - Restricted | 105,102.00 | 271,477.00 | 152,427.00 | -43.85% | 6.59 |
| 3690 | Other Revenue | 395,432.00 | 330,121.00 | 549,929.00 | 66.58% | 23.77 |
| 3691 | Other Revenue - Retained | 98,529.00 | 799,872.00 | 280,388.00 | -64.94% | 12.12 |
| 3692 | Other Revenue - Operating Reserves | 0.00 | 0.00 | 0.00 | 0.00% | 0.00 |
| 3693 | Other Revenue - Energy Net Meter | 100,000.00 | 0.00 | 100,000.00 | 0.00% | 4.32 |
| 3801 | Operating Subsidy - DHCD (400-1) | 24,978,241.00 | 23,079,526.00 | 24,283,014.00 | 5.21% | 1,049.58 |
| 3802 | Operating Subsidy - MRVP/AHVP Landlords | 0.00 | 0.00 | 0.00 | 0.00% | 0.00 |
| 3803 | Restricted Grants Received | 0.00 | 0.00 | 0.00 | 0.00% | 0.00 |
| 3920 | Gain/Loss from Sale or Disposition of Property (Capitalized or Non-Capitalized) | 0.00 | 1,021,426.00 | 0.00 | -100.00% | 0.00 |

| Consolidated Budget (400-1) for all state-aided 667 (Elderly), 200 (family), and 705 (scattered site family) developments owned by BOSTON HOUSING AUTHORITY | | | | | | |
|---|---|---|---|---|---|---|
| **EXPENSES** | | | | | | |
| Account Number | Account Class | 2026 Approved Revenue Budget | 2026 Actual Amounts Received | 2027 Approved Revenue Budget | % Change from 2026 Actual to 2027 Budget | 2027 Dollars Budgeted Per Unit per Month |
| 4110 | Administrative Salaries | 1,392,001.00 | 2,149,607.00 | 1,671,349.83 | -22.24% | 72.24 |
| 4120 | Compensated Absences | 0.00 | 656,686.00 | 0.00 | -100.00% | 0.00 |
| 4130 | Legal Expense | 99,516.00 | 351,431.00 | 93,606.00 | -73.36% | 4.05 |
| 4140 | Compensation to Authority Members | 0.00 | 0.00 | 0.00 | 0.00% | 0.00 |
| 4150 | Travel & Related Expenses | 15,245.00 | 23,242.00 | 22,239.00 | -4.31% | 0.96 |
| 4170 | Accounting Services | 0.00 | 0.00 | 0.00 | 0.00% | 0.00 |
| 4171 | Audit Costs | 18,404.00 | 32,310.00 | 35,123.00 | 8.70% | 1.52 |
| 4180 | Penalties & Interest | 0.00 | 0.00 | 0.00 | 0.00% | 0.00 |
| 4190 | Administrative Other | 4,304,680.00 | 5,778,371.00 | 5,119,709.00 | -11.39% | 221.29 |
| 4191 | Tenant Organization | 98,169.00 | 178,232.00 | 153,334.00 | -13.96% | 6.63 |
| 4310 | Water | 4,538,421.00 | 4,170,369.00 | 4,718,266.00 | 13.13% | 203.94 |
| 4320 | Electricity | 3,196,545.00 | 2,680,595.00 | 3,271,578.00 | 22.04% | 141.41 |
| 4330 | Gas | 4,550,436.00 | 2,452,107.00 | 2,540,551.00 | 3.60% | 109.81 |
| 4340 | Fuel | 431,796.00 | 404,639.00 | 900,000.00 | 122.42% | 38.90 |
| 4360 | Energy Conservation | 0.00 | 0.00 | 0.00 | 0.00% | 0.00 |
| 4390 | Other Utilities | 0.00 | 0.00 | 0.00 | 0.00% | 0.00 |
| 4391 | Payment to Solar Operator | 350,000.00 | 901,526.00 | 0.00 | -100.00% | 0.00 |
| 4392 | Net Meter Utility Credits | -350,000.00 | -283,697.00 | 0.00 | -100.00% | 0.00 |

| Consolidated Budget (400-1) for all state-aided 667 (Elderly), 200 (family), and 705 (scattered site family) developments owned by BOSTON HOUSING AUTHORITY | | | | | | |
|---|---|---|---|---|---|---|
| **EXPENSES** | | | | | | |
| Account Number | Account Class | 2026 Approved Revenue Budget | 2026 Actual Amounts Received | 2027 Approved Revenue Budget | % Change from 2026 Actual to 2027 Budget | 2027 Dollars Budgeted Per Unit per Month |
| 4410 | Maintenance Labor | 4,980,595.00 | 8,845,354.00 | 6,645,613.04 | -24.86% | 287.24 |
| 4420 | Materials & Supplies | 1,294,288.00 | 1,986,966.00 | 1,352,796.00 | -31.91% | 58.47 |
| 4430 | Contract Costs | 4,356,420.00 | 4,275,927.00 | 2,609,501.00 | -38.97% | 112.79 |
| 4510 | Insurance | 1,003,027.00 | 1,078,019.00 | 854,403.00 | -20.74% | 36.93 |
| 4520 | Payment in Lieu of Taxes | 66,660.00 | 66,660.00 | 66,660.00 | 0.00% | 2.88 |
| 4540 | Employee Benefits | 3,035,028.00 | 3,557,209.00 | 3,514,533.00 | -1.19% | 151.91 |
| 4541 | Employee Benefits - GASB 75 | 0.00 | 0.00 | 0.00 | 0.00% | 0.00 |
| 4542 | Pension Expense - GASB 68 | 0.00 | 0.00 | 0.00 | 0.00% | 0.00 |
| 4570 | Collection Loss | 716,133.00 | 611,820.00 | 1,400,946.00 | 128.98% | 60.55 |
| 4571 | Collection Loss - Fraud/Retroactive | 0.00 | 0.00 | 0.00 | 0.00% | 0.00 |
| 4580 | Interest Expense | 0.00 | 0.00 | 0.00 | 0.00% | 0.00 |
| 4590 | Other General Expense | 904,000.00 | 840,000.00 | 917,068.00 | 9.17% | 39.64 |
| 4610 | Extraordinary Maintenance - Non-Capitalized | 50,493.00 | 381,608.00 | 87,436.00 | -77.08% | 3.78 |
| 4611 | Equipment Purchases - Non Capitalized | 318,448.00 | 444,415.00 | 336,748.00 | -24.22% | 14.56 |
| 4612 | Restricted Reserve Expenditures | 0.00 | 0.00 | 0.00 | 0.00% | 0.00 |
| 4715 | Housing Assistance Payments | 0.00 | 0.00 | 0.00 | 0.00% | 0.00 |
| 4801 | Depreciation Expense | 0.00 | 125,125.00 | 0.00 | -100.00% | 0.00 |

| Consolidated Budget (400-1) for all state-aided 667 (Elderly), 200 (family), and 705 (scattered site family) developments owned by BOSTON HOUSING AUTHORITY | | | | | | |
|---|---|---|---|---|---|---|
| **SUMMARY** | | | | | | |
| Account Number | Account Class | 2026 Approved Revenue Budget | 2026 Actual Amounts Received | 2027 Approved Revenue Budget | % Change from 2026 Actual to 2027 Budget | 2027 Dollars Budgeted Per Unit per Month |
| -4410 | Maintenance Labor (Extra Services) | 2,000,002.00 | 0.00 | 684,762.29 | 0.00% | 29.60 |
| 7520 | Replacement of Equipment - Capitalized | 65,000.00 | 0.00 | 65,000.00 | 0.00% | 2.81 |
| 7540 | Betterments & Additions - Capitalized | 0.00 | 0.00 | 0.00 | 0.00% | 0.00 |

## Explanation of Budget Accounts

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

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

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

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

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

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

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

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

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

3691: Other Revenue – Retained: This account should be credited with certain miscellaneous revenue to be retained by the LHA, and which is not used to reduce the amount of operating subsidy the LHA is due. The most common examples for this account is receipts for the rental of roof antennas to cell phone providers and net meter credits earned on electricity bills from Net Meter Power Purchase Agreements (PPA's). Generally, surplus LHAs may retain 100% of these savings and deficit LHAs may retain 25% of the savings, with the 75% balance used to offset its need for operating subsidy. However, for the period 7/1/16 through 6/30/20, all deficit LHAs may keep 100% of the net meter credit savings, while they can keep 50% effective 7/1/2020.

3692: Other Revenue - Operating Reserves: This account should be credited with funds that LHAs plan to utilize from their operating reserve accounts in excess of the Allowable Non-Utility Expense Level (ANUEL). To be approvable, LHA must maintain the EOHLC 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 – EOHLC (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 EOHLC during the fiscal year for housing assistance payments to landlords. At the end of each fiscal year this account will be adjusted to equal the actual subsidy earned.

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

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

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

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

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

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

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

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

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

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

4191: Tenant Organization: LTO Funding by the LHA. Upon request the LHA shall fund all LTOs in a city or town at the annual rate of $25.00 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.

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

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

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

## Explanation of PMR Criteria Ratings

| CRITERION | DESCRIPTION |
|---|---|
| **Management** | |
| Occupancy Rate | The rating is calculated using the following formula: (Total Number of Occupied units on Monthly Report divided by (Total Number of Units Minus Units that Received a Waiver Minus Number of Units Vacant less than 30 days on Monthly Report)<br>• "No Findings" : Occupancy Rate is at or above 98%<br>• Operational Guidance: Occupancy rate is at 95% up to 97.9%<br>• Corrective Action: Adjusted occupancy rate is less than 95% |
| Tenant Accounts Receivable (TAR) | This criterion calculates the percentage of uncollected rent and related charges owed by starting with the amount reported by the LHA, as uncollected balances for the TAR (Account 1122 from the Balance Sheet) minus Normal Repayment Agreements* divided by Shelter (Tenant) Rent (account 3110 from the Operating Statement)<br>• "No Findings" : At or below 2%<br>• "Operational Guidance": More than 2% , but less than 5%<br>• "Corrective Action": 5% or more |
| Certifications and Reporting Submissions | Housing authorities are required to submit 4 quarterly vacancy certifications by end of the month following quarter end; 4 quarterly operating statements and 4 Tenant Accounts Receivable (TAR) reports within 60 days of quarter end.<br>• "No Findings": At least 11 of the required 12 reports were submitted and at least 9 were submitted on time.<br>• "Operational Guidance": Less than 11 of the required 12 reports were submitted and/or less than 9 were submitted on time. |
| Board Member Training | Percentage of board members that have completed the mandatory online board member training.<br>• "No Findings" : 80% or more completed training<br>• "Operational Guidance" : 60-79.9% completed training<br>• "Corrective Action" : <60 % completed training |
| Staff Certifications and Training | Each LHA must have at least one staff member complete a relevant certification or training During the fiscal year. The number of required trainings varies by LHA size.<br>• No Findings: LHAs completed the required number of trainings<br>Corrective Action: LHAs have not completed any trainings |
| Annual Plan (AP) Submitted | Housing authorities are required to submit an annual plan every year.<br>• "No Findings" =Submitted on time<br>• "Operational Guidance" =Up to 45 days late<br>• "Corrective Action" =More than 45 days late |

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

| CRITERION | DESCRIPTION |
|---|---|
| **Financial** | |
| Adjusted Net Income | The Adjusted Net Income criterion calculation starts with an LHA's Net Income and subtracts Depreciation, GASB 45 (Retirement Costs), GASB 68 (Retirement Costs), Extraordinary Maintenance (maintenance expense outside of routine/ordinary expenses), and Equipment Purchases – Non Capitalized. This Adjusted Net Income amount is then divided by the Total Expenses of the LHA. If this Adjusted Net Income amount is positive, it means underspending and if it is negative it means overspending.<br><br>Underspending Rating:<br>• "No Findings" : 0 to 9.9%<br>• "Operational Guidance": 10 to 14.9%<br>• "Corrective Action": 15% or higher<br><br>Overspending Rating:<br>• "No Findings" : 0 to -4.9%<br>• "Operational Guidance": -5% to -9.9%<br>• "Corrective Action": -10% or below |
| Operating Reserves | Current Operating Reserve as a percentage of total maximum reserve level. Appropriate reserve level is buffer against any unforeseen events or expenditures.<br><br>• "No Findings" :35%+ of maximum operating reserve<br>• "Operational Guidance": 20% to 34.9% of maximum operating reserve<br>• "Corrective Action": <20% of maximum operating reserve |
| **Capital Planning** | |
| Capital Spending | Under the Formula Funding Program (FF), authorities receive undesignated funds to spend on projects in their Capital Improvement Plan. They are rated on the percentage of available funds they have spent over a three-year period<br>• "No Findings" = at least 80%<br>• "Operational Guidance" = At least 50%<br>• "Corrective Action" = Less than 50% |
| **Health & Safety** | |
| Health & safety violations | EOHLC 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. |

| CRITERION | DESCRIPTION |
|---|---|
| **Facility Management – Inspection Standards and Practices** | |
| 100% Unit Inspections | All units inspected at LHA during FY under review<br>• No Findings: 100% of units inspected<br>• Corrective Action: Less than 100% of units inspected |
| LHA Inspections Reports/Work Orders | Unit inspection reports create, track, and report work orders for inspection repairs, and inspection WOs completed within 30 days or add to DM/CIP<br>• 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<br>• 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<br>• Corrective Action: Any EHS work orders/lease violations not created, tracked, reported, or completed; Or 1 of the following: LHA failed to create, track or report a) More than 1 non-EHS deficiency (small LHA); b) More than 2 non-EHS deficiencies (Medium/Large) |
| Accuracy of LHA Inspections | Unit inspection reports accurately reflect necessary repairs<br>• No Findings: c.667 unit has less than 2 EHS deficiencies and c.200/705 unit has less than 3 EHS deficiencies<br>• Operational Guidance: c.667 unit has 2 EHS deficiencies or c.200/705 has 3 EHS deficiencies<br>• Corrective Action: c.667 has equal to or greater than 3 EHS deficiencies or c.200/705 unit has equal to or greater than 4 EHS deficiencies |
| **Facility Management – Preventative Maintenance Standards and Practices** | |
| LHA Preventative Maintenance Schedule Accuracy and Implementation of Preventative Schedules | LHA preventative maintenance schedule accurately reflects all necessary work to maximize the life of LHA components<br>• No Findings: c.667 unit less than 2 EHS deficiencies and c.200/705 less than 3 EHS deficiencies<br>• Operational Guidance: c.667 2 EHS deficiencies or c.200/705 3 EHS deficiencies<br>• Corrective Action: c.667 equal to or greater than 3 EHS deficiencies or c.200/705 equal to or greater than 4 EHS deficiencies |

| CRITERION | DESCRIPTION |
|---|---|
| **Facility Management – Vacancy Turnover Standards and Practices** | |
| Vacancy Turnover Work Orders | Work orders created for every vacancy and completed within 30 days (or waiver requested)<br>• 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<br>• 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<br>• Corrective Action: Vacancy work orders are not created, tracked and reported for every unit; Or vacancy work orders are Maintenance Ready in >45 days for c.667 and >60 days for c.200/705 and have no approved waiver |
| Accuracy and Standard of Vacancy Turnovers | Vacancy turnover work orders accurately reflect necessary repairs<br>• No Findings: c.667 unit less than 2 EHS deficiencies and c.200/705 less than 3 EHS deficiencies<br>• Operational Guidance: c.667 2 EHS deficiencies or c.200/705 3 EHS deficiencies<br>• Corrective Action: c.667 equal to or greater than 3 EHS deficiencies or c.200/705 equal to or greater than 4 EHS deficiencies |
| **Work Order Types and Systems** | |
| Emergency Work Orders | All emergency work orders are created, tracked, reported and completed within 48 hours<br>• No Findings: All emergency work orders under review are created, tracked, reported and completed within 48 hours<br>• 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<br>• 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 |
| **CRITERION** | **DESCRIPTION** |
| Requested Work Orders | All requested work orders are created, tracked, reported and completed within 14 days or added to DM/CIP<br>• 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<br>• 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<br>• Corrective Action: Not all requested work orders are completed within 14 days or added to DM/CIP |

## Policies

The following policies are currently in force at the BOSTON HOUSING AUTHORITY:

| Policy | Last Ratified by Board Vote | Notes |
|---|---|---|
| *Capitalization Policy | 7/5/2000 | |
| *Fair Housing Marketing Plan | 3/23/2026 | ACOP |
| *Grievance Policy | 3/26/2021 | |
| *Language Access Plan | 5/5/2014 | |
| *Personnel Policy | 10/18/2021 | Policy Acknowledgement Sign-off |
| *Procurement Policy | 5/29/2009 | |
| *Reasonable Accommodations Policy | 1/12/2016 | |
| *Rent Collection Policy | 3/23/2026 | ACOP |
| Anti-Discriminatory Harassment Policy | 10/24/2013 | Civil Rights Protection Plan |
| Community Room Use | 3/25/2014 | |
| Credit/Debit Card Policy | 8/1/2007 | |
| Criminal Offender Records Information (CORI) Policy | 3/23/2026 | ACOP |
| Emergency Response Plan | 1/1/2026 | The emergency staffing policy was updated 1/1/2026, however, the old policy is still in effect for Teamsters. |
| Investment Policy | 7/5/2000 | |
| Other – Define in the 'Notes' column | 9/1/2004 | Resident Maintenance and Citation Policy |
| Other – Define in the 'Notes' column | 8/10/2023 | Resident Participation Policy |
| Other – Define in the 'Notes' column | 3/23/2026 | Admissions and Continued Occupancy Policy |
| Pet Policy | 4/1/2002 | |
| Sexual Harassment Policy | 4/1/2019 | Workplace Harassment Policy |
| Smoking Policy | 4/1/2017 | Non-Smoking Policy is part of Public Housing Lease, section 18 |

* Starred policies are required by EOHLC. 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 EOHLC.

## Waivers

BOSTON HOUSING AUTHORITY has received the following waivers from EOHLC'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 Approved by EOHLC | Date Expired |
|---|---|---|---|
| Tenant Grievance Procedures | align federal and state tenant grievance procedures | 1/15/2019 | |
| Admissions and Continued Occupancy Policy | Waiver I - Site Based List within CHAMP; Waiver II - Administrative Transfer Waiver Definition; Waiver III - Good Cause Transfer Definition; Waiver IV - Elimination of Transfer for Good Cause Priority; Waiver V - Supported Housing Program Applicants | 12/23/2021 | |

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

# Glossary

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

**AHVP: Alternative Housing Voucher Program**

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

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

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

**AP: Annual Plan**

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

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

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

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

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

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

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

**CNA:** Capital Needs Assessment

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

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

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

**EOHLC**: Massachusetts Executive Office of Housing and Livable Communities

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

**FF: Formula Funding**

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

**FYE: Fiscal Year End**

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

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

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

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

**LHA: Local Housing Authority**

**LTO**: Local Tenants Organization

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

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

**MOR:** Management and Occupancy Report

**MRVP**: Massachusetts Rental V EOHLC's annual review of each housing authority's performance. It pulls together data on the authority's occupancy rates, tenant accounts receivables, accounts payable, budget variance, operating reserve, capital improvement plan submission, capital spending, annual inspections and work order and maintenance systems to identify and address areas of strength and areas for development. Its goal is to allow EOHLC and the LHA to take a deep dive into the data, lift up best practices, and work together towards improving operations voucher Program.

**PMR**: Performance Management Review

**RCAT**: Regional Capital Assistance Team

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

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

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

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

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

## Attachments

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

- Performance Management Review
- final draft Capital Improvement Program tables and narratives
- Resident Surveys
- BHA state program proposed budget
- Cover sheet for tenant satisfaction surveys

Explanation of attachments:
EOHLC provides the cover sheet for tenant satisfaction surveys. BHA has provided the past tenant survey results and will update as additional results are available.

The Performance Management Review is done on a biennial basis. EOHLC has provided the PMR from March 2025.

There are errors in the state capital improvement plan and budget data. BHA staff are working with EOHLC staff and consultants to correct. In the meantime, BHA has added the capital improvement plan tables and narrative and the state program proposed budget.

## Resident Surveys – Background

Since 2016 EOHLC 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.

# 400-1: Budget Request

**Units:** 1928 | **Unit Months:** 23136 | **Revision:** 0

| | | FY 2026 Approved Budget | | FY 2027 Requested | |
|---|---|---|---|---|---|
| **Acct.** | **Classification** | **PUM** | **Amount** | **PUM** | **Amount** |
| | **REVENUE** | | | | |
| 3110 | Shelter Rent | $233.32 | $10,796,302.00 | $485.91 | $11,241,949.00 |
| 3111 | Shelter Rent - Tenants - Fraud/Retroactive | $0.00 | $0.00 | $0.00 | $0.00 |
| 3115 | Shelter Rent - Section 8 | $0.00 | $0.00 | $0.00 | $0.00 |
| 3190 | Non-Dwelling Rentals | $0.00 | $0.00 | $0.00 | $0.00 |
| 3400 | Administrative Fee - MRVP/AHVP | $0.00 | $0.00 | $0.00 | $0.00 |
| 3610 | Interest on Investments - Unrestricted | $20.76 | $960,604.00 | $50.61 | $1,170,819.00 |
| 3611 | Interest on Investments - Restricted | $2.27 | $105,102.00 | $6.59 | $152,427.00 |
| 3690 | Other Revenue | $8.55 | $395,432.00 | $23.77 | $549,929.00 |
| 3691 | Other Revenue - Retained | $2.13 | $98,529.00 | $12.12 | $280,388.00 |
| 3692 | Other Revenue - Operating Reserves | $0.00 | $0.00 | $0.00 | $0.00 |
| 3693 | Other Revenue - Energy Net Meter | $2.16 | $100,000.00 | $4.32 | $100,000.00 |
| 3801 | Operating Subsidy - DHCD (400-1) | $539.81 | $24,978,241.00 | $1,049.58 | **Incomplete** ⚠ |
| 3802 | Operating Subsidy - MRVP/AHVP Landlords | $0.00 | $0.00 | $0.00 | $0.00 |
| 3803 | Restricted Grants Received | $0.00 | $0.00 | $0.00 | $0.00 |
| 3920 | Gain/Loss from Sale or Disposition of Property (Capitalized or Non-Capitalized) | $0.00 | $0.00 | $0.00 | $0.00 |
| **3000** | **Total Revenue** | **$809.00** | **$37,434,210.00** | **$1,632.89** | **$37,778,526.00** |
| | **EXPENSES** | | | | |
| | **Administration** | | | | |
| 4110 | Administrative Salaries | $30.08 | $1,392,001.00 | $72.24 | $1,671,349.83 |
| 4120 | Compensated Absences | $0.00 | $0.00 | $0.00 | $0.00 |
| 4130 | Legal Expense | $2.15 | $99,516.00 | $4.05 | $93,606.00 |
| 4140 | Compensation to Authority Members | $0.00 | $0.00 | $0.00 | $0.00 |
| 4150 | Travel & Related Expenses | $0.33 | $15,245.00 | $0.96 | $22,239.00 |
| 4170 | Accounting Services | $0.00 | $0.00 | $0.00 | $0.00 |
| 4171 | Audit Costs | $0.40 | $18,404.00 | $1.52 | $35,123.00 |
| 4180 | Penalties & Interest | $0.00 | $0.00 | $0.00 | $0.00 |
| 4190 | Administrative Other | $93.03 | $4,304,680.00 | $221.29 | $5,119,709.00 |

| | | FY 2026 Approved Budget | | FY 2027 Requested | |
|---|---|---|---|---|---|
| Acct. | Classification | PUM | Amount | PUM | Amount |
| 4191 | Tenant Organization | $2.12 | $98,169.00 | $6.63 | $153,334.00 |
| **4100** | **Total Administration** | **$128.11** | **$5,928,015.00** | **$306.68** | **$7,095,360.83** |
| | **Utilities** | | | | |
| 4310 | Water | $98.08 | $4,538,421.00 | $203.94 | $4,718,266.00 |
| 4320 | Electricity | $69.08 | $3,196,545.00 | $141.41 | $3,271,578.00 |
| 4330 | Gas | $98.34 | $4,550,436.00 | $109.81 | $2,540,551.00 |
| 4340 | Fuel | $9.33 | $431,796.00 | $38.90 | $900,000.00 |
| 4360 | Energy Conservation | $0.00 | $0.00 | $0.00 | $0.00 |
| 4390 | Other Utilities | $0.00 | $0.00 | $0.00 | $0.00 |
| 4391 | Payment to Solar Operator | $7.56 | $350,000.00 | $0.00 | $0.00 |
| 4392 | Net Meter Utility Credits | ($7.56) | ($350,000.00) | $0.00 | $0.00 |
| **4300** | **Total Utilities** | **$274.84** | **$12,717,198.00** | **$494.05** | **$11,430,395.00** |
| | **Maintenance** | | | | |
| 4410 | Maintenance Labor | $150.86 | $6,980,597.00 | $316.84 | $7,330,375.33 |
| 4420 | Materials & Supplies | $27.97 | $1,294,288.00 | $58.47 | $1,352,796.00 |
| 4430 | Contract Costs | $94.15 | $4,356,420.00 | $112.79 | $2,609,501.00 |
| **4400** | **Total Maintenance** | **$272.98** | **$12,631,305.00** | **$488.10** | **$11,292,672.33** |
| | **General Expenses Expenses** | | | | |
| 4510 | Insurance | $21.68 | $1,003,027.00 | $36.93 | $854,403.00 |
| 4520 | Payment in Lieu of Taxes | $1.44 | $66,660.00 | $2.88 | $66,660.00 |
| 4540 | Employee Benefits | $65.59 | $3,035,028.00 | $151.91 | $3,514,533.00 |
| 4541 | Employee Benefits - GASB 75 | - | - | - | - |
| 4542 | Pension Expense - GASB 68 | - | - | - | - |
| 4570 | Collection Loss | $15.48 | $716,133.00 | $60.55 | $1,400,946.00 |
| 4571 | Collection Loss - Fraud/Retroactive | $0.00 | $0.00 | $0.00 | $0.00 |
| 4580 | Interest Expense | $0.00 | $0.00 | $0.00 | $0.00 |
| 4590 | Other General Expense | $19.54 | $904,000.00 | $39.64 | $917,068.00 |
| **4500** | **Total General Expenses Expenses** | **$123.72** | **$5,724,848.00** | **$291.91** | **$6,753,610.00** |
| | **Other Expenses Expenses** | | | | |
| 4610 | Extraordinary Maintenance - Non-Capitalized | $1.09 | $50,493.00 | $3.78 | $87,436.00 |
| 4611 | Equipment Purchases - Non Capitalized | $6.88 | $318,448.00 | $14.56 | $336,748.00 |
| 4612 | Restricted Reserve Expenditures | - | - | - | - |

| | | FY 2026 Approved Budget | | FY 2027 Requested | |
|---|---|---|---|---|---|
| Acct. | Classification | PUM | Amount | PUM | Amount |
| 4715 | Housing Assistance Payments | $0.00 | $0.00 | $0.00 | $0.00 |
| 4801 | Depreciation Expense | - | - | - | - |
| **4600** | **Total Other Expenses Expenses** | **$7.97** | **$368,941.00** | **$18.33** | **$424,184.00** |
| **4000** | **Total Expenses** | **$807.62** | **$37,370,307.00** | **$1,599.08** | **$36,996,222.16** |
| **2700** | **Net Income (Deficit)** | **$1.38** | **$63,903.00** | **$33.81** | **$782,303.84** |
| | **CAPITAL EXPENDITURES** | | | | |
| 7520 | Replacement of Equipment - Capitalized | $1.40 | $65,000.00 | $2.81 | $65,000.00 |
| 7540 | Betterments & Additions - Capitalized | $0.00 | $0.00 | $0.00 | $0.00 |
| **7500** | **Total Nonoperating Expenditures** | **$1.40** | **$65,000.00** | **$2.81** | **$65,000.00** |
| **7600** | **Excess Revenue Over Expenses** | **($0.02)** | **($1,097.00)** | **$31.00** | **$717,303.84** |

# Boston Housing Authority

Chapter 200 & Chapter 705 Family Housing
Fall 2020

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

In the Fall of 2020, surveys were sent to 10,163 family housing units (Chapters 200 and 705). 2,124 surveys were filled out and returned.

In the **Boston Housing Authority,** surveys were sent to a total of **367** Boston housing units, **67** surveys were completed.

This report provides some information about how the residents from the **Boston Housing Authority** answered the survey. It compares their answers to those from residents in the entire state and to those from large LHAs in Metro Boston. These large LHAs in Metro Boston include: Arlington, Boston, Everett, Chelsea, Quincy, Revere, Somerville, Waltham, Watertown. (Please note that survey data may not have been received from each one of these nearby LHAs.)

## Communication

- **Communication with management:** Residents were asked about how they interacted with their Housing Authorities in the last 12 months. The table below shows what percentage of residents said they did each of the following:

| | Boston Housing Authority | Large LHAs in Metro Boston* | Entire State |
|---|---|---|---|
| Felt they were usually or always treated with courtesy and respect when they contacted management……. | **81%** | **69%** | **71%** |
| Knew the Executive Director held a meeting with residents..... | **14%** | **11%** | **15%** |

* Large LHAs in Metro Boston include: Arlington, Boston, Chelsea, Everett, Quincy, Revere, Somerville, Waltham, Watertown. (Please note that survey data may not have been received from each one of these nearby LHAs.)

# Maintenance and Repair

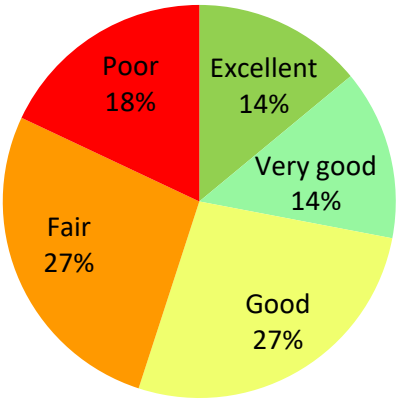
- **Communication with maintenance staff:** Residents were asked about their interactions with the Boston Housing Authority maintenance staff in the last 12 months.

| | Boston Housing Authority | Large LHAs in Metro Boston | Entire State |
|---|---|---|---|
| Felt they were usually or always treated with courtesy and respect when they contacted maintenance……. | 79% | 72% | 75% |
| Were contacted by the Housing Authority before staff entered their apartment…… | 94% | 86% | 86% |

- **Overall maintenance:** Respondents were asked how they would rate overall building maintenance *(such as clean halls and stairways and having lights and elevators that work)* and outdoor space maintenance *(such as litter removal and clear walkways)* in the last 12 months.

**Building maintenance:**

**Boston Housing Authority**

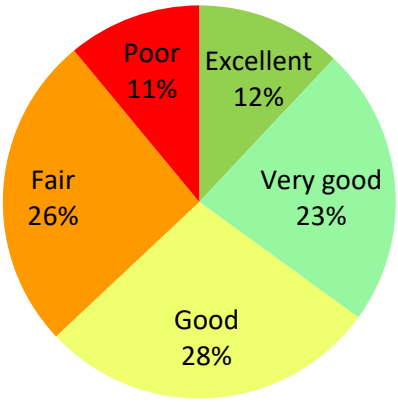



**Large LHAs in Metro Boston**

**Entire State**

**Outdoor maintenance:**

**Boston Housing Authority**




**Large LHAs in Metro Boston**

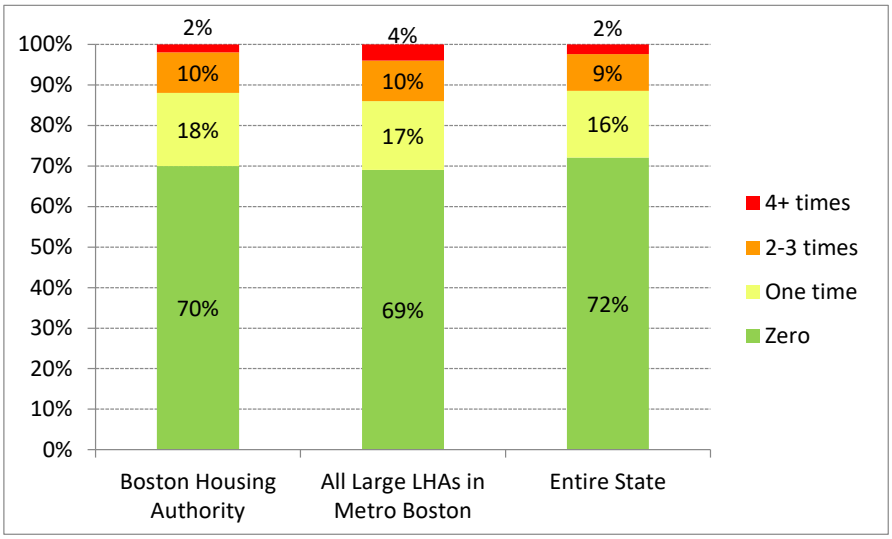
**Entire State**

- **Heating and Water Problems:** About one half of respondents had a problem with their heating and about two-thirds had a plumbing problem in the last 12 months.

| | Boston Housing Authority | Large LHAs in Metro Boston | Entire State |
|---|---|---|---|
| Had any heating problem…….…… | 45% | 55% | 56% |
| Had any water problem…… | 70% | 74% | 74% |

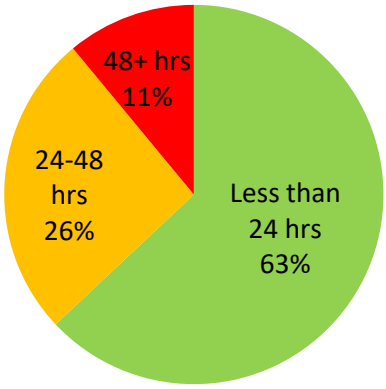
- **Heating Problems**

**How many times did residents completely lose heat?**
The chart below shows how many times respondents had completely lost heat in the last 12 months. The green part of the bars shows what percentage of residents never completely lost heat. The yellow shows who lost heat one time. The orange shows those who lost heat 2-3 times. And the red shows those who lost heat 4 or more times in the last 12 months.

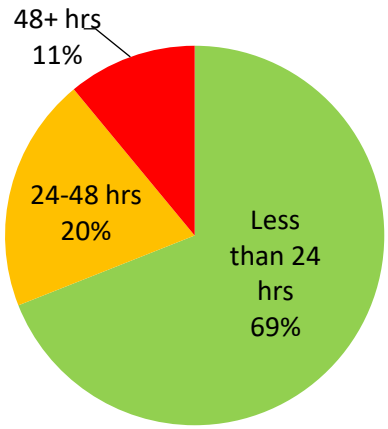



**How long did it usually take for heat to come back on?** For those respondents who reported completely losing heat, we asked how long it usually took for the heat to come back on – less than 24 hours, 24 - 48 hours, or more than 48 hours.

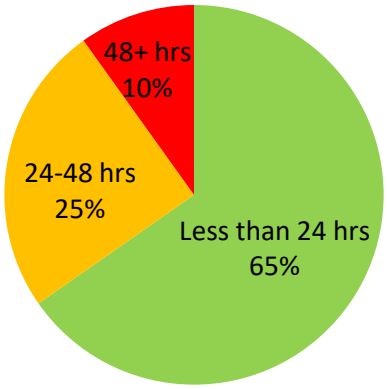
**Boston Housing Authority**




**Large LHAs in Metro Boston**

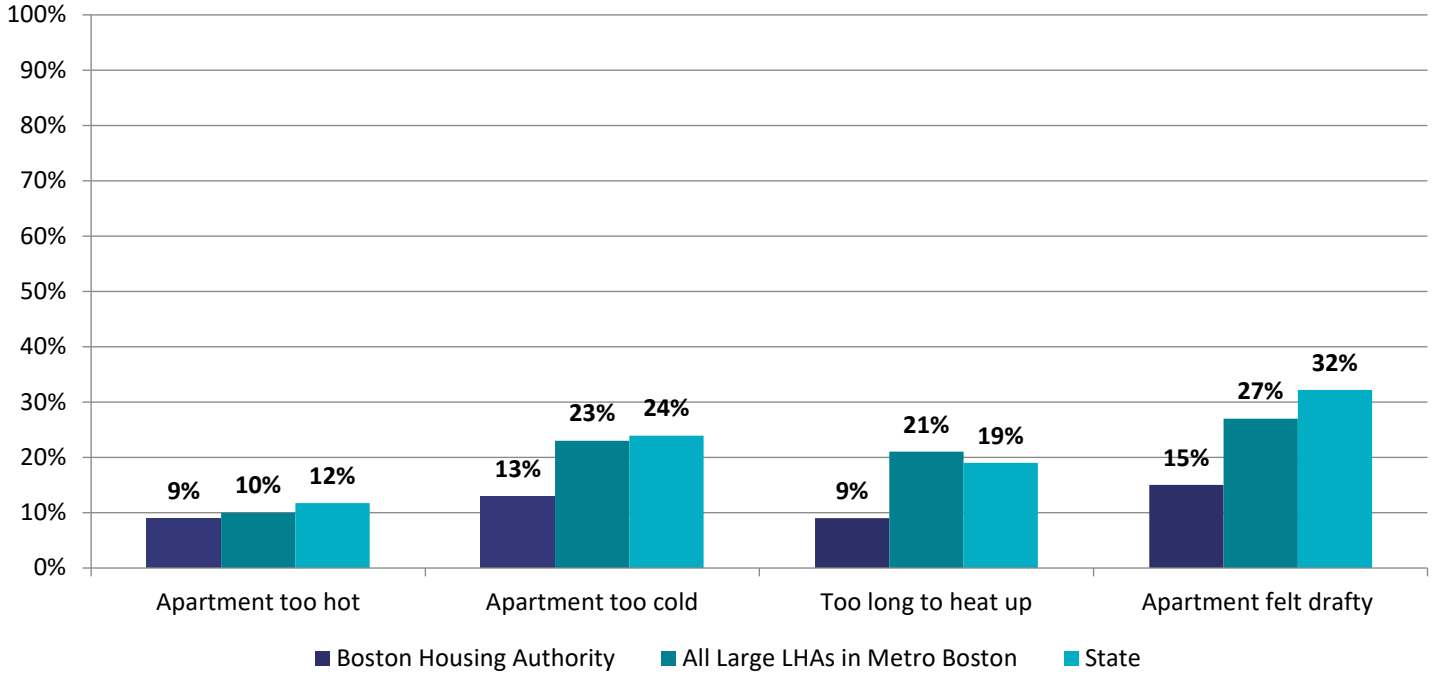



**Entire State**



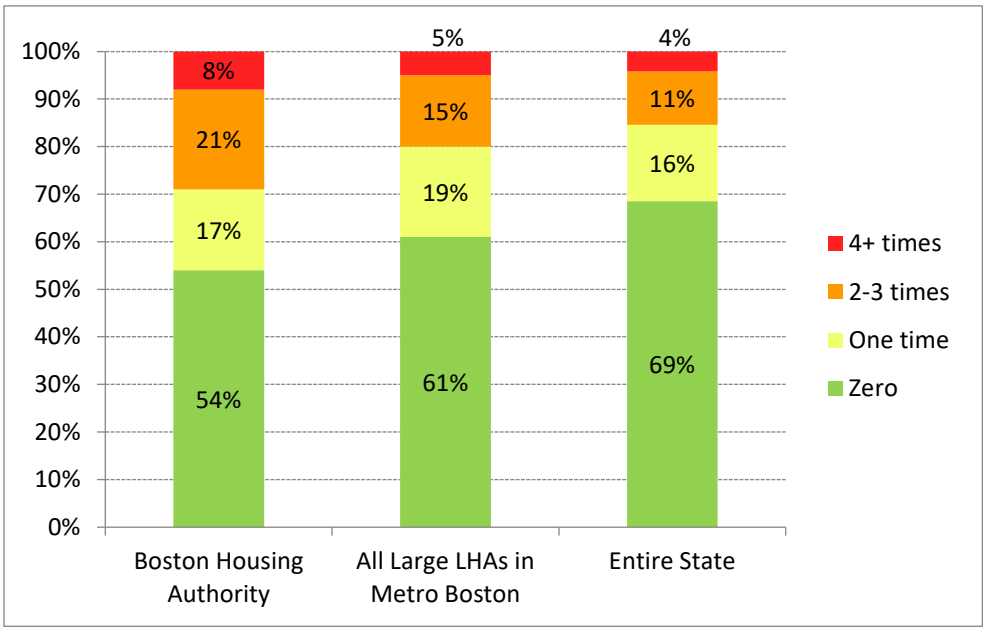
- **Other Heating Problems**

**In the last 12 months did residents have other heating problems?**
The chart below shows what percentage of residents experienced other heating problems in the last 12 months.

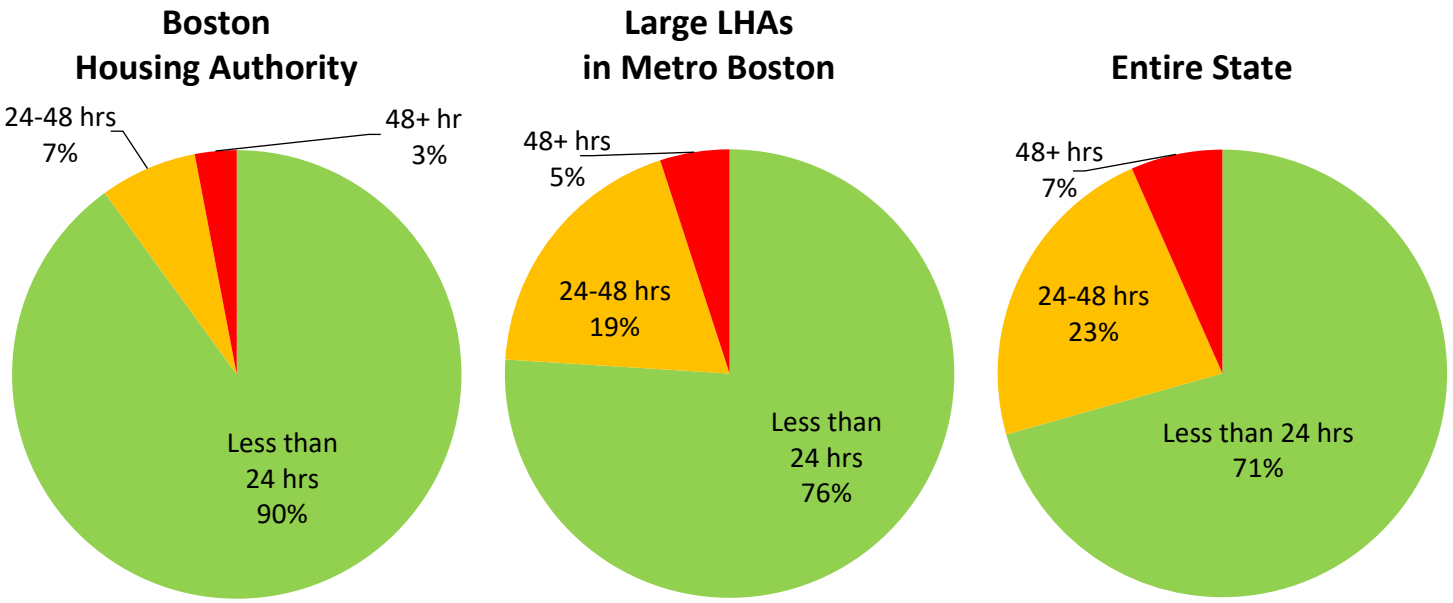



- **Water or Plumbing Problems**

**How many times did residents have no hot water in their apartment?**
The chart below shows how many times respondents did not have hot water in their apartment in the last 12 months. The green part of the bars shows what percentage of residents never had this problem. The yellow shows who lost hot water one time. The orange shows those who lost hot water 2-3 times. And the red shows those who lost hot water 4 or more times in the last 12 months.

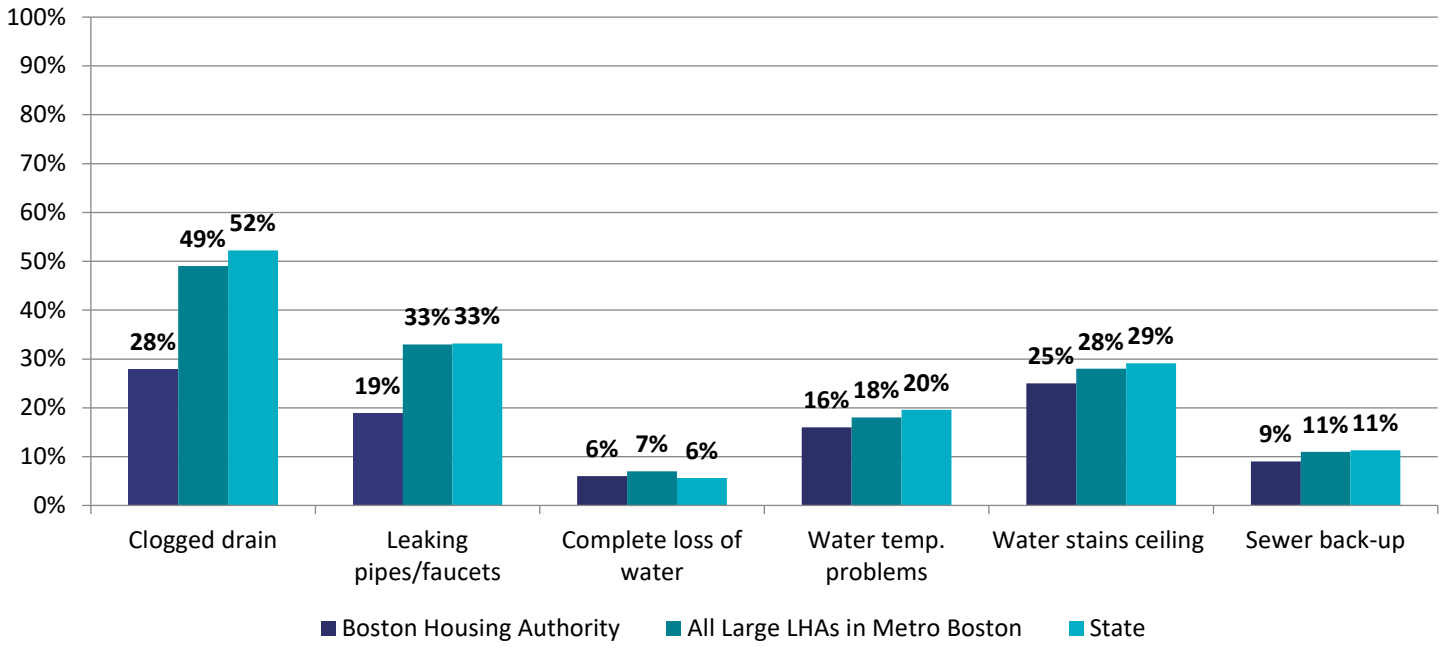


**How long did it usually take for hot water to come back on?** For those respondents who reported not having hot water in their apartment, we asked how long it usually took for hot water to come back on – less than 24 hours, 24 - 48 hours, or more than 48 hours.



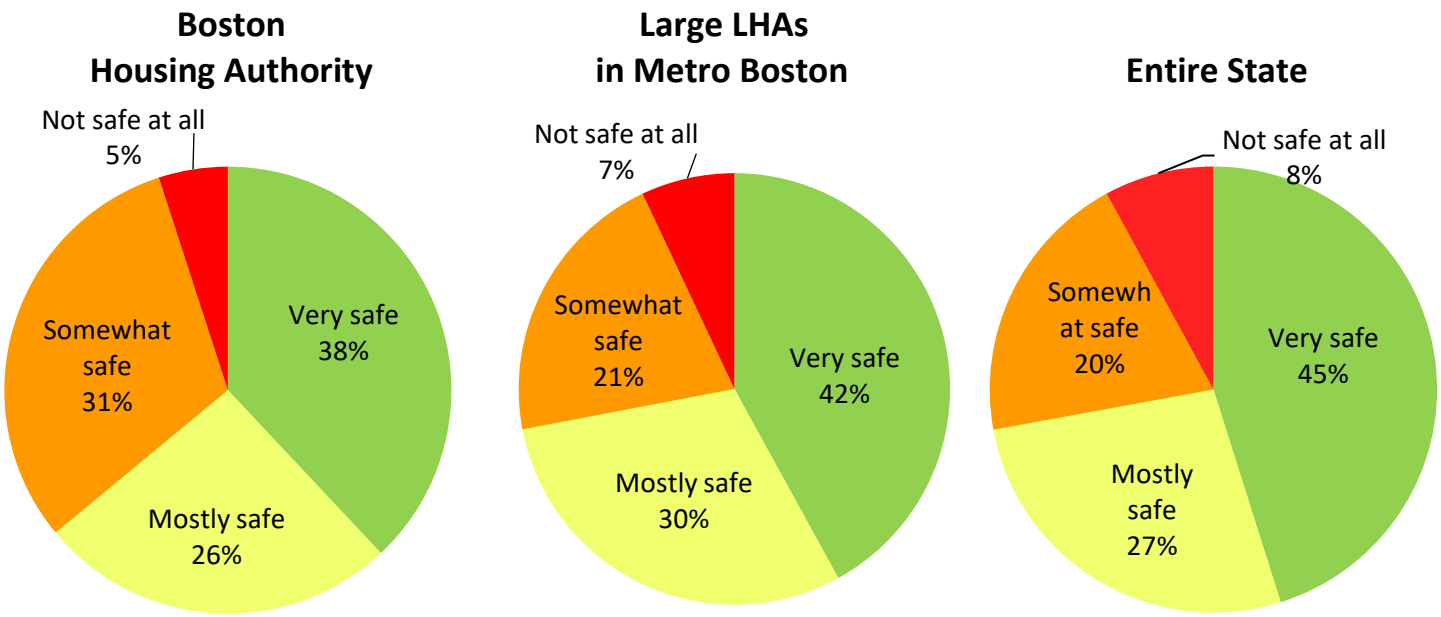

- **Other Water or Plumbing Problems**

**In the last 12 months did residents have other water or plumbing problems?**
The chart below shows what percentage of residents experienced other water or plumbing problems in the last 12 months.

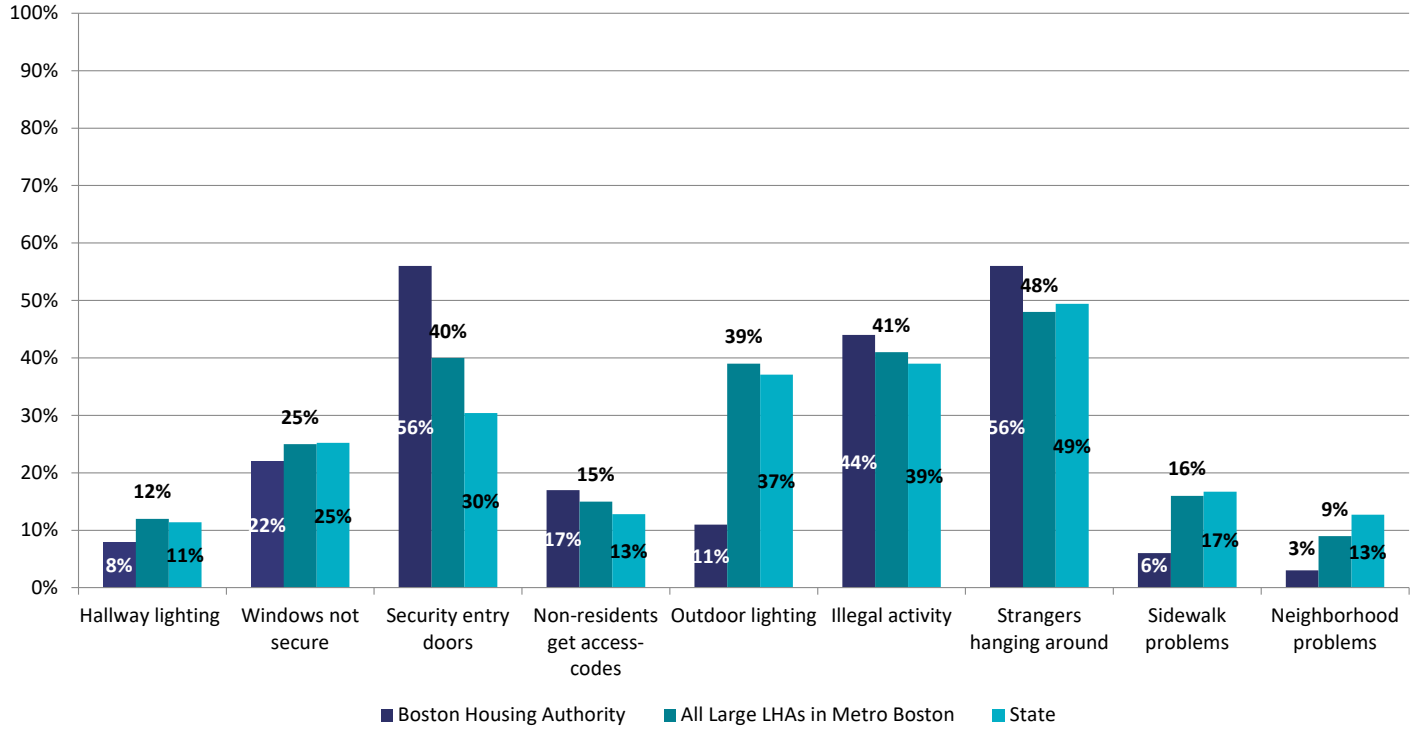


# Safety

**Respondents were asked how safe they felt in their development**. The charts below show what percentage of residents said they felt *very safe, mostly safe, somewhat safe*, or *not safe at all* in their development in the last 12 months.



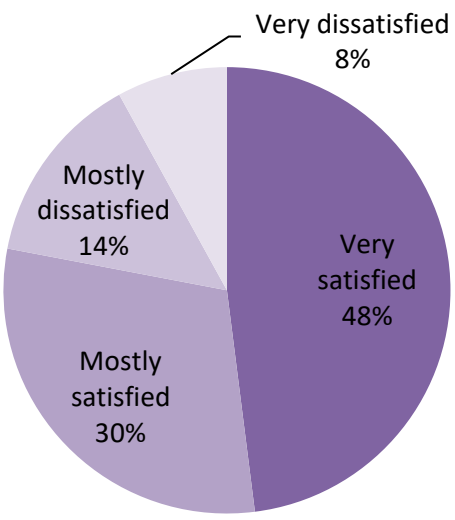

**Reasons why respondents felt unsafe in their development:** Respondents were asked why they felt unsafe in their development. This chart shows what specific concerns respondents mentioned.



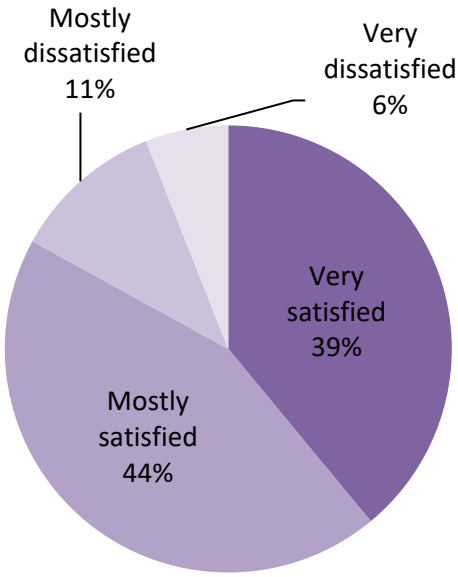
# Overall Satisfaction

**Respondents were asked about their overall satisfaction living in their development**. The chart below shows what percentage of people said they were *very satisfied*, *mostly satisfied*, *mostly dissatisfied,* or *very dissatisfied*.

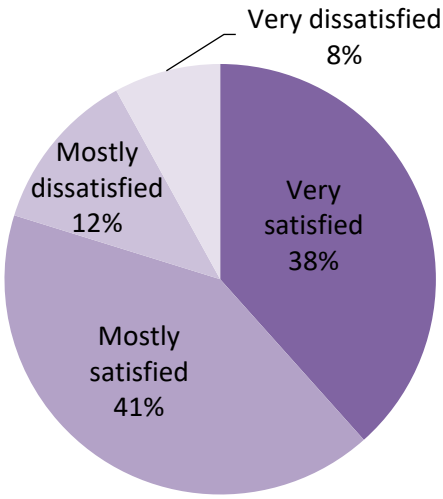
**Boston Housing Authority**




**Large LHAs in Metro Boston**




**Entire State**



# Boston Housing Authority

Chapter 667 Housing
Summary 2019 – 2021

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

**Fall 2019:**

- Surveys were sent to 6955 housing units (Chapter 667). 3352 surveys were filled out and returned.

**Fall 2021:**

- Surveys were sent to 8350 housing units (Chapter 667). 3787 surveys were filled out and returned.

- In the **Boston Housing Authority,** surveys were sent to a total of **177** Boston housing units (Chapter 667); **47** surveys were completed.

This report provides some information about how the residents from the **Boston Housing Authority** who answered the survey responded. It compares their answers to those from residents in the entire state and to those from large LHAs in Metro Boston. These large LHAs in Metro Boston include: Arlington, Boston, Chelsea, Quincy, Waltham and Watertown.

## Communication

- **Communication with management:** Residents were asked about how they interacted with their Housing Authorities in this peer group in the last 12 months. The table below shows what percentage of residents said they did each of the following:

| | Boston Housing Authority | Large LHAs in Metro Boston* | Entire State |
|---|---|---|---|
| Felt they were usually or always treated with courtesy and respect when they contacted management……. | 79% | 77% | 84% |
| Knew the Executive Director held a meeting with residents..... | 14% | 32% | 43% |

* Large LHAs in Metro Boston: Arlington, Boston, Chelsea, Quincy, Waltham and Watertown.

# Maintenance and Repair

- **Communication with maintenance staff:** Residents were asked about their interactions with the Boston Housing Authority maintenance staff in the last 12 months.

| | Boston Housing Authority | Large LHAs in Metro Boston | Entire State |
|---|---|---|---|
| Felt they were treated with courtesy and respect when they contacted maintenance……..……. | 81% | 83% | 88% |
| Were contacted by the Housing Authority before entering their apartment……. | 93% | 90% | 91% |

- **Overall maintenance** Respondents were asked how they would they rate overall building maintenance *(such as clean halls and stairways and having lights and elevators that work)* and outdoor space maintenance *(such as litter removal and clear walkways)* in the last 12 months.

**Building maintenance:**

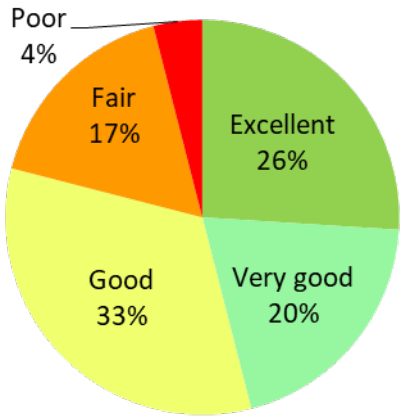
**Boston Housing Authority**

**Large LHAs in Metro Boston**

**Entire State**

**Outdoor maintenance:**

**Boston Housing Authority**




**Large LHAs in Metro Boston**

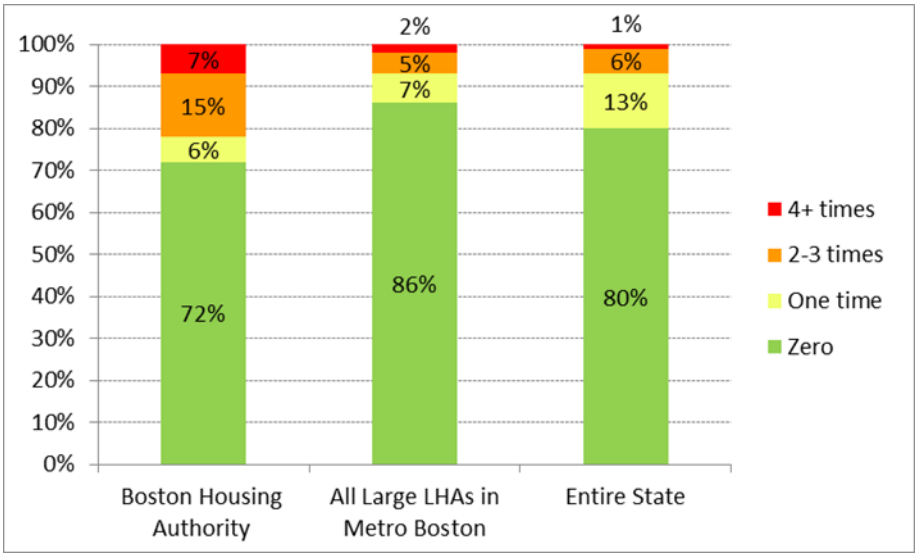
**Entire State**

- **Heating and Water Problems:** More than one third of respondents had a problem with their heating and about three quarters had a plumbing problem in the last 12 months.

| | Boston Housing Authority | Large LHAs in Metro Boston | Entire State |
|---|---|---|---|
| Had any heating problem…….……. | 43% | 35% | 36% |
| Had any water problem……... | 72% | 59% | 57% |

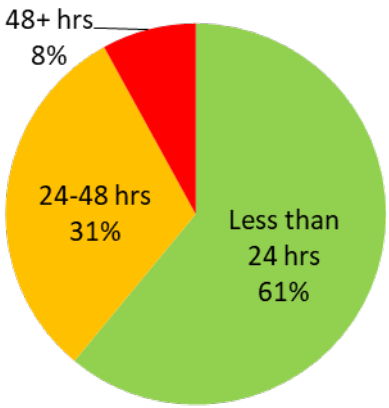
- **Heating Problems**

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

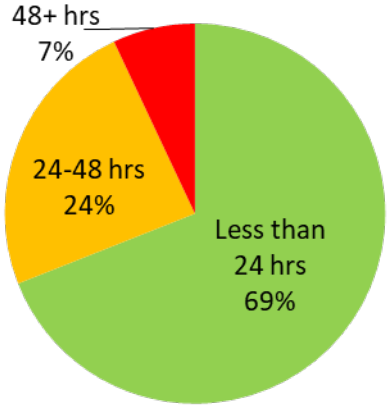



**How long did it usually take for heat to come back on?** For those respondents who reported completely losing heat, we asked how long it usually took for the heat to come back on – less than 24 hours, 24 - 48 hours, or more than 48 hours.

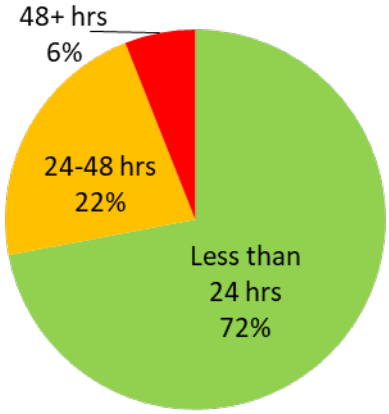
**Boston Housing Authority**




**Large LHAs in Metro Boston**

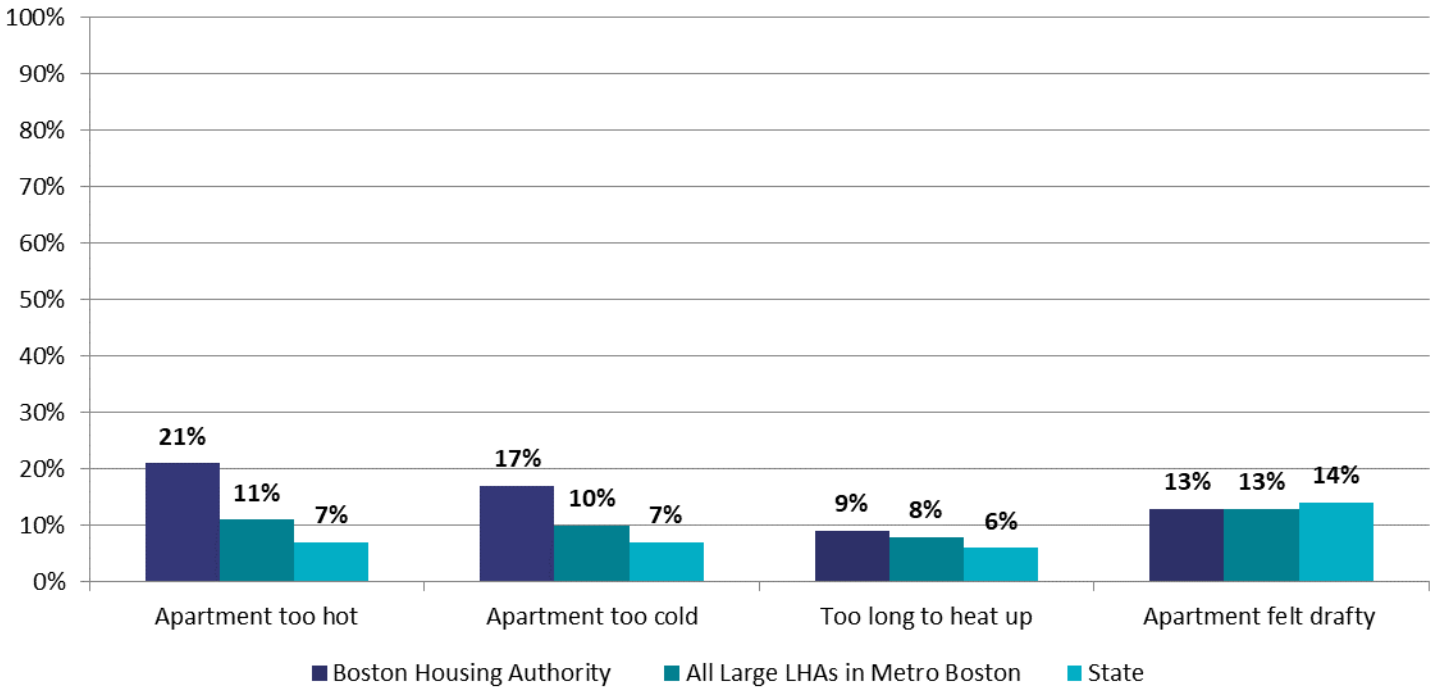



**Entire State**



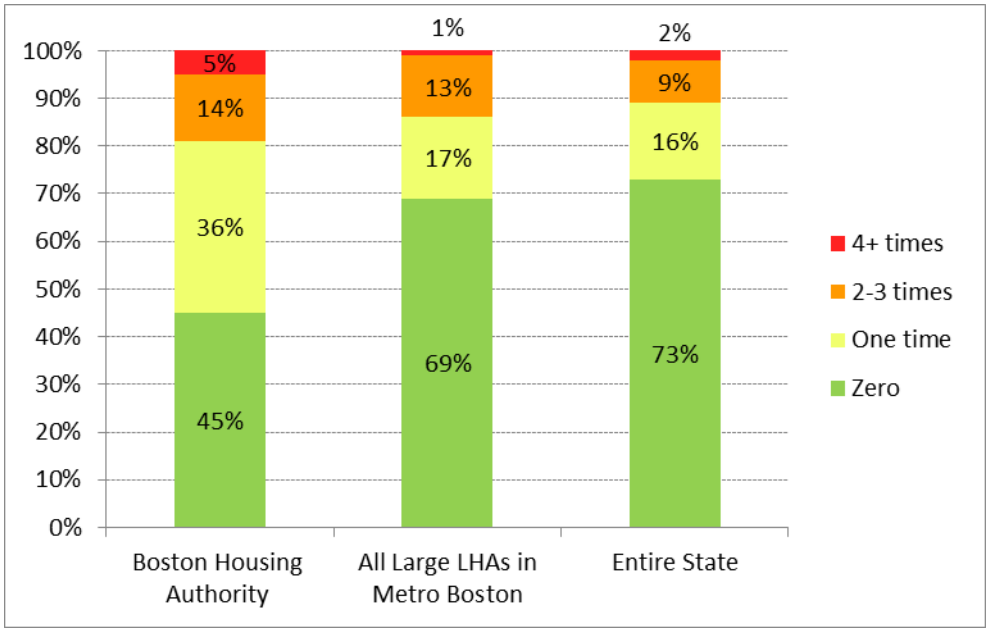
- **Other Heating Problems**

**In the last 12 months did residents have other heating problems?**
The chart below shows what percentage of residents experienced other heating problems in the last 12 months.

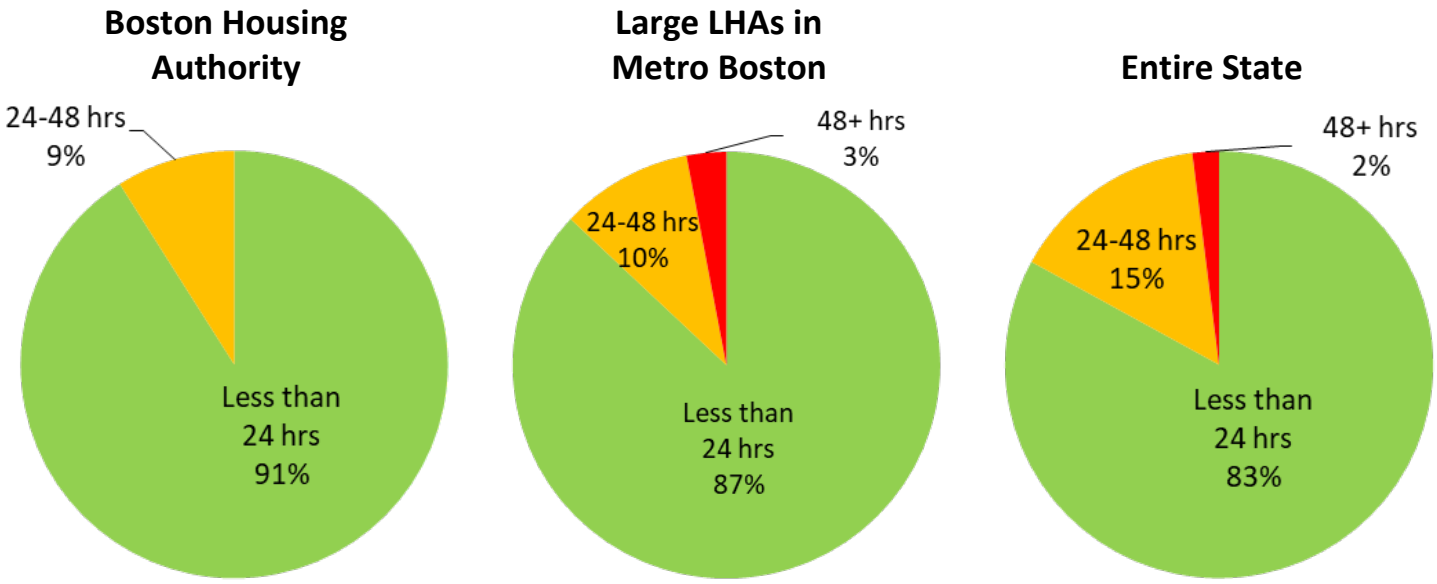



- **Water or Plumbing Problems**

**How many times did residents have no hot water in their apartment?**
The chart below shows how many times respondents did not have no hot water in their apartment in the last 12 months. The green part of the bars shows what percentage of residents did not have the problem at all. The yellow shows who had the problem one time. The orange shows those who had the problem 2-3 times. And the red shows those who had the problem 4 or more times in the last 12 months.

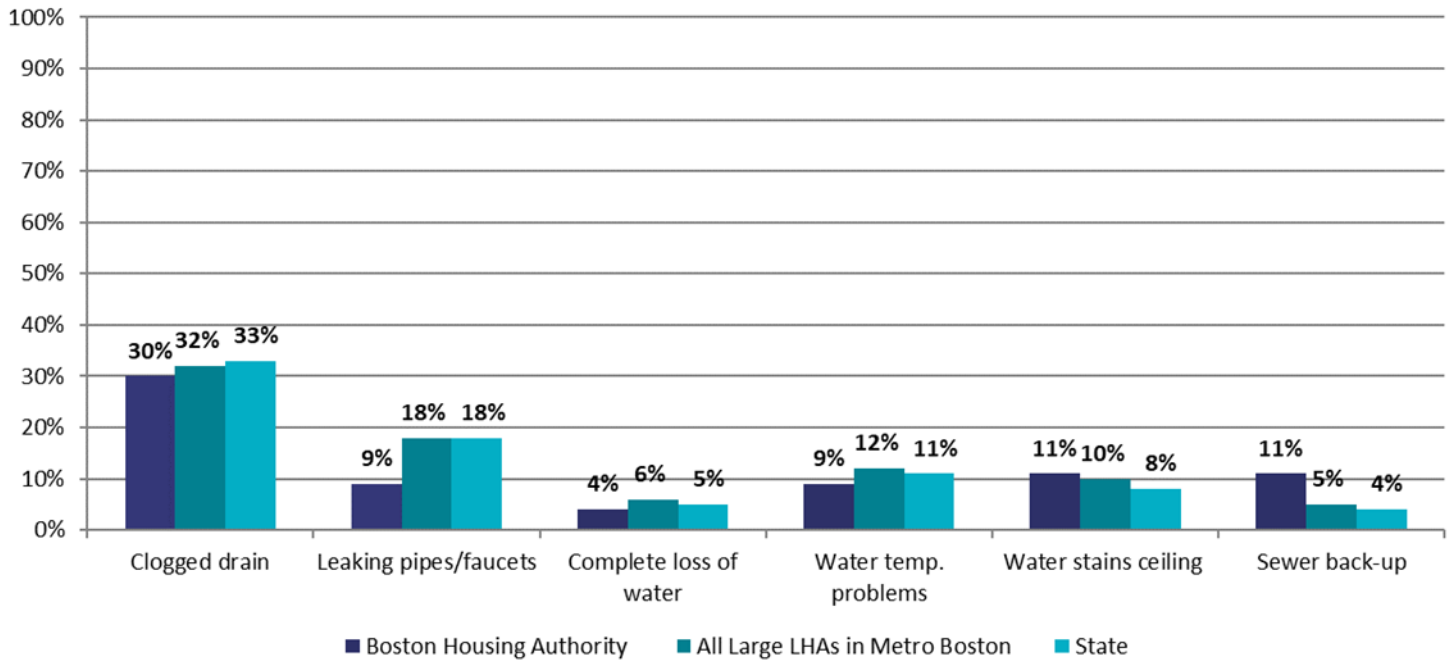


**How long did it usually take for hot water to come back on?** For those respondents who reported not having hot water in their apartment, we asked how long it usually took for hot water to come back on – less than 24 hours, 24 - 48 hours, or more than 48 hours.



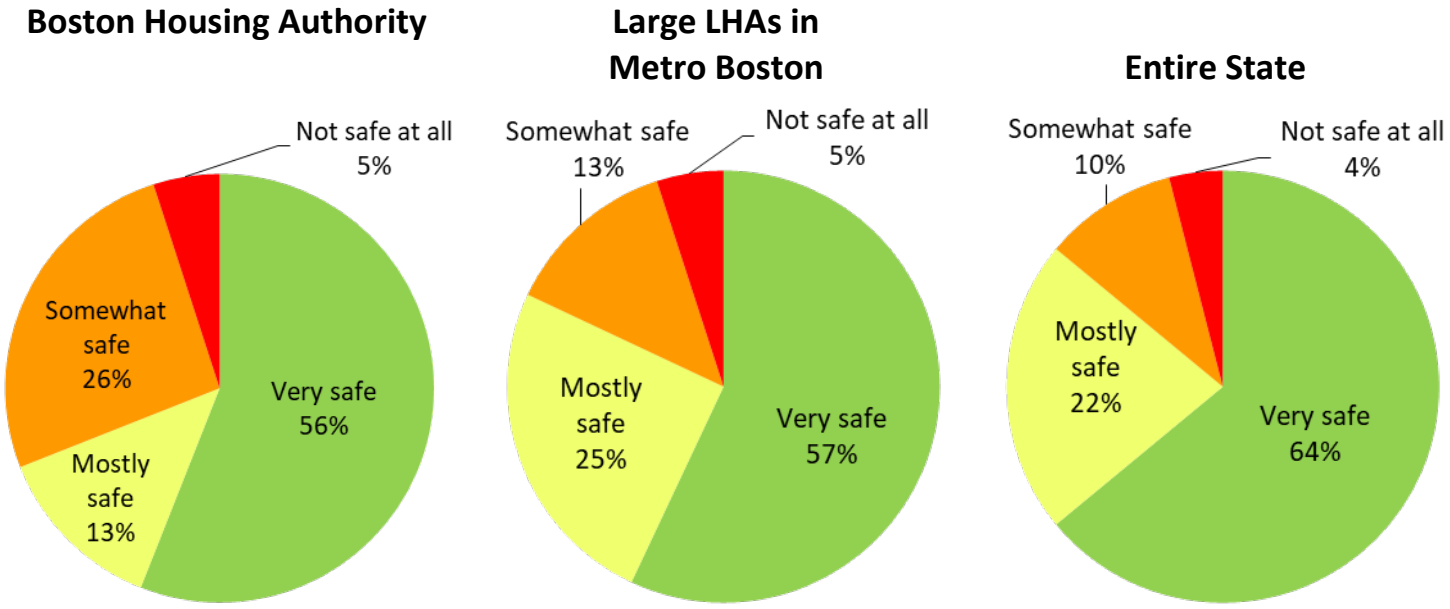

- **Other Water or Plumbing Problems**

**In the last 12 months did residents have other water or plumbing problems?**
The chart below shows how many times respondents had other water or plumbing problems in the last 12 months.

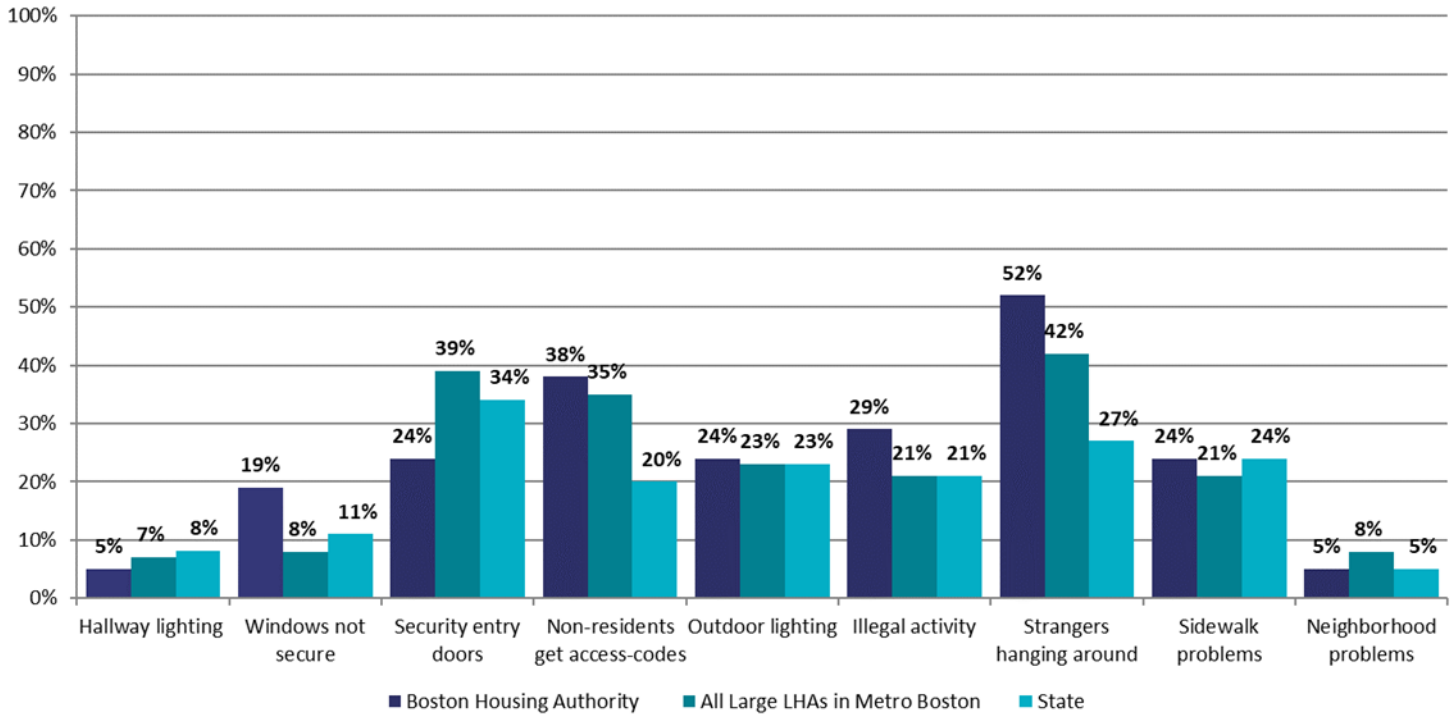


# Safety

**Respondents were asked how safe they felt in their development**. The charts below show what percentage of residents said they felt "very safe", "mostly" safe, "somewhat safe", or "not safe at all" in their development in the last 12 months.



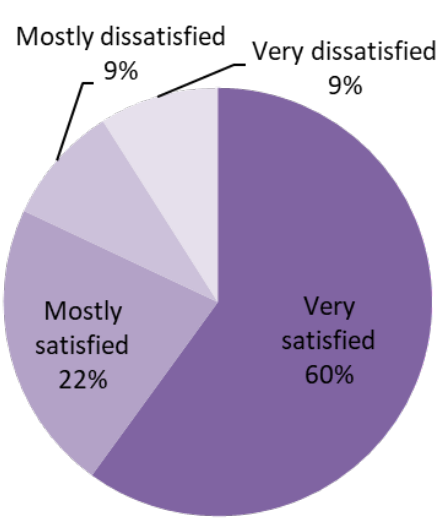

**Reasons why respondents felt unsafe in their development:** Respondents were asked why they felt unsafe in their development. This chart shows what specific concerns respondents mentioned.



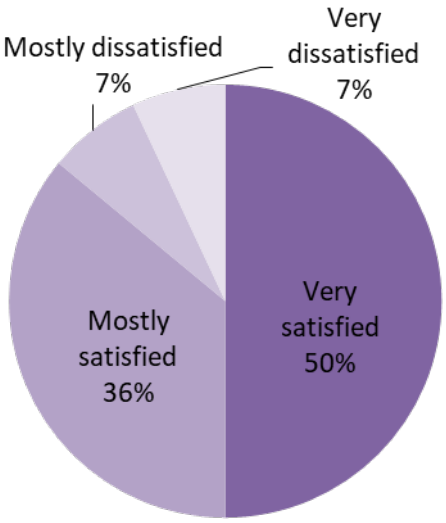
# Overall Satisfaction

**Respondents were asked about their overall satisfaction living in their development**. The chart below shows what percentage of people said they were “very satisfied”, “mostly satisfied”, “mostly dissatisfied”, or “very dissatisfied”.

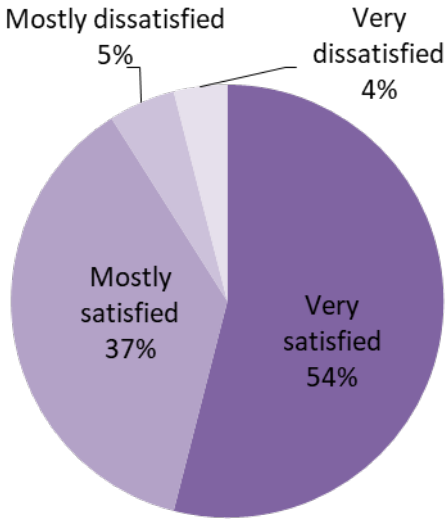
**Boston Housing Authority**




**Large LHAs in Metro Boston**




**Entire State**



# Capital Improvement Plan (CIP) Description

## What Is the Capital Improvement Plan?

The Capital Improvement Plan (CIP) is a five-year plan that outlines major repairs and improvements to housing authority properties. It describes each project's scope, estimated cost, and timeline, while reflecting the Local Housing Authority's prioritization of its most critical needs, particularly those related to resident health and safety. The plan also identifies how projects may be funded and when they are anticipated to take place, based on the Massachusetts Executive Office of Housing and Livable Communities (EOHLC) fiscal year (July 1 through June 30).

## How Projects Are Funded Each Year

Each year, every Local Housing Authority (LHA) receives a Formula Funding Award from EOHLC. This annual award provides the primary source of funding for new projects included in the CIP. While funding levels may vary, it is generally reasonable to anticipate that similar award amounts will be available over the next two years, which helps inform project planning and scheduling. LHAs may also apply for additional "special awards" from EOHLC for specific projects that meet certain criteria, such as emergency repairs, regulatory compliance, or energy and water conservation improvements.

## Why Plans and Costs May Change

The CIP is a planning document and must be submitted to EOHLC for review and approval. While the plan reflects current cost estimates, project budgets often increase between the time they are planned and when construction begins. As a result, available funding may not go as far as originally anticipated, and some projects may need to be adjusted, delayed, or completed in phases.

## Why Project Schedules Can Shift

Because the CIP is updated each year, project schedules and priorities may change over time. In particular, previously unidentified conditions or urgent repair needs may arise after the plan is developed; due to their impact on health, safety, or building integrity, these issues may take precedence over projects that were previously scheduled. When this occurs, the plan may be updated through CIP Revision.

To better understand how a plan has changed—including which projects were advanced, delayed, or added—it is helpful to compare the current year's CIP with the prior year's CIP. This comparison can show how EOHLC funding decisions and plan revisions have affected project timing and priorities.

## Other Funding Sources

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. However, not all of these funding sources are available every year, or in all communities.

The CIP includes the following parts:

1. A list of existing projects approved in last year's CIP Plan or added to the plan through CIP Revision during the year.
2. A list of planned capital projects showing spending per fiscal year.
3. 'Narrative Questions' with a variety of additional information.

# Active and Proposed Projects with Projected Spending by Fiscal Year

| Active Projects | | | |
|---|---|---|---|
| **Project #** | **Project Title** | **Development** | **Total Development Cost** |
| 035498 | ARPA FF: Site Utilities Drainage | FAIRMOUNT | $202,115.00 |
| 035499 | ARPA FF: ECM Control Replacement | ARCHDALE | $818,288.33 |
| 035527 | AIP: 667 Routine Turnovers | | $0.00 |
| 035536 | BHA Project # 2421 01_02 Mod at Fairmount | | $95,000.00 |
| 035537 | "BHA Project # 1854-13_02 Building Envelope " | Scattered Sites | $335,757.83 |
| 035538 | "BHA Project # 1854-14_02 Windows and Doors " | Scattered Sites | $120,118.72 |
| 035539 | "BHA Project # 1854-18_02 Basement Insulation " | Scattered Sites | $29,820.95 |
| 035540 | "BHA Project # 1854-16_02 ERV and Controls " | Scattered Sites | $74,692.90 |
| 035541 | "BHA Project # 1854-17_02 Heat Pump and Domestic Hot Water " | Scattered Sites | $218,884.16 |
| 035542 | BHA Project # 2495-02 Creative Place-Making Award | ARCHDALE | $504,000.00 |
| 035365 | FF: building envelope - 49 Tremont St. Charlestown | 49 Tremont Street - Charlestown | $352,144.17 |
| 035411 | Auth-Wide: Stair Hall Improvements (Phase I) BHA#1259-01 | WEST BROADWAY | $0.00 |
| 035424 | FF: SUST-CSI 2019: Building Envelope and Mechanicals - Msgr Powers Phase I | MONSIGNOR POWERS | $6,966,063.54 |
| 035427 | FF: Authority Wide New Building Envelope BHA 1562-01 | Scattered Sites | $0.00 |
| 035429 | BHA#2419-01_02 Roofing at Archdale (Bldgs 1 & 2) | WEST BROADWAY | $1,082,410.00 |
| 035454 | Authority Wide Comprehensive Site Survey | GALLIVAN BLVD. | $60,000.00 |
| 035470 | SUST-CSI 2019: Msgr Powers Phase II - HVAC, and associated work | MONSIGNOR POWERS | $10,645,144.98 |
| 035480 | Site beautification (Private grant) | | $695,620.00 |
| 035486 | ARPA Targeted: Boston Fire Alarm Upgrade -BHA Project #2065-02 | 19 Winston Road (DMH) | $3,590,152.98 |
| 035487 | ARPA Targeted: Boston Fed Pac Panel Upgrade -BHA Project #2067-02 | ARCHDALE | $986,197.21 |
| 035503 | BHA Project #2094-01_02 UST Stablization(2) 15,000 Tanks / AST Installation | FANEUIL | $661,967.42 |

| Active Projects | | | |
|---|---|---|---|
| 035505 | BHA Project #1947-02 - Envelope Improvement TA Only - No FF | SOUTH STREET | $412,204.53 |
| 035508 | "BHA Project #2092-01_Investigative Site Development Study - Tremont | Torrey Street | $156,062.21 |
| 035509 | BHA Project #2093-01_Investigative Site Development Study - Wentworth & Torrey | 1492 Tremont Street - Dorchester | $104,115.49 |
| 035510 | BHA Project # 2068-02 Envelope | Scattered Sites | $0.00 |
| 035513 | BHA Project # 2097-02_ Wire Access Points at 4 State Sites - Phase I | GALLIVAN BLVD. | $273,040.00 |
| 035515 | BHA Project #2172-02 BWSC Emergency Underground Water Main Repairs | GALLIVAN BLVD. | $2,100.00 |
| 035517 | BHA Project #2171-01 Drone Aerial Imaging | SOUTH STREET | $4,465.00 |
| 035519 | BHA 2222-02 Stove Replacement with Induction Stoves | FRANKLIN FIELD 667-2 | $427,912.13 |
| 035521 | DMH Tree Trimming - Authority Wide | 19 Winston Road (DMH) | $52,099.00 |
| 035522 | 2193-01 Ramp Replacement | Scattered Sites | $235,000.00 |
| 035523 | BHA Project # 2285-01 Resiliency Feasibility Study at West Broadway | WEST BROADWAY | $40,000.00 |
| 035524 | BHA Project # 2282-01\|02 25A Energy Pilot | FRANKLIN FIELD 667-1 | $0.00 |
| 035525 | BHA Project No. 2321-01_02 Archdale Parkland Playground - No Capital Funds | ARCHDALE | $1,072,984.70 |
| 035526 | BHA Project # 2338-01\|02 SUST Gas Stove Electrification -Archdale | ARCHDALE | $2,451,408.73 |
| 035528 | 2050-11 Transformer Replacement Phase II | WEST BROADWAY | $732,629.44 |
| 035529 | 2099-11 Load Center Upgrades | GALLIVAN BLVD. | $1,608,980.00 |
| 035530 | 2051-11 Vault Transformer Replacement | SOUTH STREET | $1,588,007.68 |
| 035531 | 2087-11 Standby Emergency Generator System | MONSIGNOR POWERS | $449,379.37 |
| 035532 | 1854-11 Building Envelope Restoration at 21 Maryland Street | Scattered Sites | $1,379,902.82 |
| 035533 | Building \| Site Utility Upgrades | FRANKLIN FIELD 667-1 | $3,419,832.01 |
| 035534 | BHA Prj #2342-01\|02 Site Beautification Phase II (Private grant - no FF) | FRANKLIN FIELD 667-1 | $651,710.00 |
| Total | | | $42,500,211.30 |

| **Proposed Projects** | | | |
|---|---|---|---|
| **FY2027** | | **Available Formula Funding:** | **$3,702,454.46** |
| **Project Title** | **Development** | **Total Development Cost** | **Special Award(s) Requested** |
| Interior Stair Repairs | SOUTH STREET | $1,756,712.00 | |
| As Needed Authority-wide Building Envelope Repairs - Phase II | FRANKLIN FIELD 667-1 | $644,188.00 | |
| BHA Project # 2198 01_02 Common Area Lighting Upgrades | FRANKLIN FIELD 667-1 | $72,450.00 | |
| BHA Project #0000-01 Elevator Modernization | MONSIGNOR POWERS | $479,658.00 | |
| BHA Project # 2511-02 Comprehensive Heating Plant Upgrades | FRANKLIN FIELD 667-1 | $522,750.00 | $522,750.00 |
| Total | | $3,475,758.00 | $522,750.00 |

| **Proposed Projects** | | |
|---|---|---|
| **FY2028** | **Anticipated Formula Funding:** | **$3,702,454.46** |
| **Project Title** | **Development** | **Total Development Cost** |
| Unit Modernization - Kitchens and Bath - Scattered Sites | 49 Tremont Street - Charlestown | $907,500.00 |
| Kitchen / Bath Modernization 2010 - OCC | ARCHDALE | $2,248,722.00 |
| As Needed Authority-wide Building Envelope Repairs - Phase II | ARCHDALE | $225,000.00 |
| Authority Wide Stair Hall Improvements - Phase II | ARCHDALE | $225,000.00 |
| Total | | $3,606,222.00 |

| **Proposed Projects** | | |
|---|---|---|
| **FY2029** | **Anticipated Formula Funding:** | **$3,702,454.46** |
| **Project Title** | **Development** | **Total Development Cost** |
| BHA Project # 2195 01_02 Kitchen. Bathrooms Upgrades and Ventilation | GALLIVAN BLVD. | $2,104,672.00 |
| BHA Project # 2096 01_02 Building Envelope Masonry Repairs and Windows | GALLIVAN BLVD. | $1,578,504.00 |
| Total | | $3,683,176.00 |

| Years 4 (reflect estimated annual planning amounts) | | |
|---|---|---|
| **FY2030** | | |
| **Project Title** | **Development** | **Total Development Cost** |
| Building Envelope - Brick Exterior Wall | SOUTH STREET | $3,650,328.00 |
| Total | | $3,650,328.00 |

| Years 5 (reflect estimated annual planning amounts) | | |
|---|---|---|
| **FY2031** | | |
| **Project Title** | **Development** | **Total Development Cost** |
| Kitchen / Bath Modernization - OCC | SOUTH STREET | $1,695,776.00 |
| Total | | $1,695,776.00 |

## The 'Narrative Questions' with Additional Information

## 1. Project Closeout

Have you reviewed in progress projects, contacted your PM to close out old projects, and recirculated unused funds? Please explain why or why not.

Answer: Yes

Explanation: Yes. We reviewed in-progress projects, coordinated with our Project Manager to close out old projects, and recirculated unused funds to support other capital needs. These actions keep project records current and ensure available funding is directed toward priority improvements.

## 2. Request for Additional Funding

Request additional funding from EOHLC by going to the project's detail page and adding a comment that includes the funding type and requested amount. Upload any relevant attachments at the bottom of this form. Do not include requests already approved in your latest CIP.

## 3. Overall Goals of the Capital Improvement Plan

What do you plan to achieve with this year's CIP plan and how do the projects you've selected support this goal?

Explanation: BHA's CIP is to support and advance housing that fosters resilient and thriving communities, offering a comprehensive array of affordable housing options and opportunities for all residents. Our mission is to promote equity, focusing particularly on households with the lowest incomes, underserved protected classes, and individuals with special needs, while providing housing and supportive services to all members of BHA's diverse and inclusive communities. The key objective is to maintain and expand the supply of truly affordable housing units within the State Portfolio, to provide homes for low- and moderate-income households of Boston. Projects that preserve and enhance residents' quality of life will be prioritized.

## 4. Changes from the Previous CIP

Aside from completing projects that were listed in your previous CIP and adding new projects in the new planning year(s), in what way does your new CIP differ from your previous CIP?

Explanation: There are no significant changes from the previous year's Capital Improvement Plan (CIP) aside from adding new projects through CIP revisions on a rolling basis.

## 5. Requirements from previous CIP approval

A. Approval Requirements

Did your previous CIP Approval Letter include conditions to be satisfied when implementing the CIP projects or conditions to be included in your new CIP?

Answer: No

Approval Requirements:

B. Completed Requirements

Have you completely satisfied the conditions of your previous CIP Approval? Please explain why or why not.

Answer: N/A

Explanation: N/A

## 6. Project Priorities

Does your CIP only include high priority capital projects (Priority 1 and 2 projects)? If no, explain your rationale for including lower priority projects.

Answer: Yes

## 7. High Priority Deficiencies

Are there any high priority capital deficiencies (priority 1 or 2 projects) in your CPS Backlog that you could not fit in your year 1 or 2 CIP plan? If yes, provide an explanation and the plan to address the deficiencies. Make sure to go through the CPS Backlog and update priorities when necessary.

Answer: Yes

Explanation: Currently there are numerous outdated projects listed in BHA's CPS backlog that have been folded into other projects or that will be addressed through alternative funding (e.g., special grants). BHA intends to clean up the backlog to remove outdated projects.

## 8. Accessibility

Are you aware of any accessibility deficiencies in your portfolio (units, common areas, and sites)? If yes, describe the deficiencies and list the projects in this CIP that will address them.

Answer: Yes

Explanation: BHA recognizes that its state-funded public housing portfolio has historically lacked key accessibility features, and over the years has targeted specific funding in each Capital Improvements Plan to incrementally make adaptations. Currently BHA is targeting accessibility upgrades at Fairmount with part of the funding awarded in the $10-million HILAPP grant. BHA is also redeveloping Faneuil Gardens in phases (phase one of which secured a Public Housing Innovations Fund grant), and the newly constructed community will meet and exceeds all modern accessibility requirements.

## 9. Special Needs Development

A. DMH/DDS Developments

LHAs must meet with each service provider on an annual basis to discuss the physical condition and necessary repairs of each of the DDS/DMH developments (167 or 689). Does your LHA have one or more DDS/DMH developments? If yes, provide details from the service provider input.

Answer: Yes

B. DMH/DDS Projects

Does your plan include projects for the DMH/DDS developments recommended by this service provider? If no, provide an explanation. Include input from the service provider staff for expanding the DMH/DDS set aside.

Service Provider Input Completion Date: 07/16/2026

Answer: Yes

Explanation: Yes. BHA's CIP addresses service provider recommendations for DMH/DDS developments, including wider shower stalls that accommodate full wheelchair entry and caregiver assistance. BHA has completed a bathroom-to-shower conversion at Zero Cliffmont Street. Additional work includes rebuilding decks and ramps at 1049 Tremont Street and planning comprehensive modernization of 1049 Tremont and Torey Street. These plans would upgrade DDS housing and introduce a broader housing mix to strengthen community connections and reduce social isolation. Service provider staff input will guide these improvements and the proposed expansion of the DMH/DDS set-aside.

## 10. Sustainability Program

Are you requesting Sustainability Funding for any of your projects?

Answer: Yes

If yes, have you engaged with the Mass Save Low Income (LEAN) Program? If no, please explain why not?

Answer: Yes

## 11. Solar Initiatives

Does your current CIP contain roof replacement projects?

Answer: Yes

If yes, does this project include installing solar panels on the new roofs? If no, please explain why not.

Answer: Yes

## 12. Resilience

Are any of your developments flagged for weather vulnerabilities in CPS? For example, sea-level rise/storm surge, rainfall flooding, and extreme heat.

Answer: Yes

If yes, do the projects in this CIP planned at these developments incorporate resilient design elements into the initial design plans and costs? If no, please explain.

Answer: Yes

## 13. Fossil Fuels

PHN 2024-11 stipulates that EOHLC Capital Funds cannot be used to install new fossil fuel-fired equipment, barring a few exceptions. This includes natural gas, propane, and heating oil.

Will fossil fuel-fired equipment be installed as a part of any project in this CIP?

Answer: No - see below.

If yes, can these project(s) electrify the fossil fuel equipment instead? LEAN or EOHLC Sustainability funds may be able to help. If no, please explain why this project deserves an exception from EOHLC Policy

Answer:

Explanation: BHA does in certain emergency situations need to make limited replacements of fossil fuel-fired equipment in certain cases due to emergency situations.

## 14. Vacant Units

Please list the projects in this CIP submission that are tied to reoccupying vacant units. If there are none, write none.

Explanation: BHA#2419-01_02 Roofing at Archdale (Bldgs 1 & 2)
Scheduled FY26
ARPA FF + FF: BHA Project #2091-02 Urgent Roofing Repairs
at South Street Completed 09/26

## 15. EOHLC/RCAT Assistance

Has EOHLC or RCAT staff provided you with assistance developing this CIP? If yes, who were the EOHLC or RCAT staff involved?

Answer: Yes

Explanation: CyberSense / Beth Thompson

## 16. Certification Statement

I certify that this is the complete and accurate list of projects that I will be submitting to the Board for approval as part of the Annual Plan process.

If there are any additions, deletions, or modifications to this list of projects resulting from the Board or LTO/public meeting, I will promptly notify my EOHLC Project Manager and RCAT Project Manager and make the necessary changes.

Answer: Yes

## 17. Other Comments

Comments:

# BOSTON HOUSING AUTHORITY

## Performance Management Review (PMR) Report

## Fiscal Year End 3/31/2025

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

# Executive Office of Housing and Livable Communities (EOHLC)

## PMR Desk Audit Ratings Summary Official Published PMR Record

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

| | |
|---|---|
| Housing Authority | BOSTON HOUSING AUTHORITY |
| Fiscal Year Ending | Mar 2025 |
| Housing Management Specialist | Melanie Loveland-Hale |
| Facilities Management Specialist | Wilzor Exantus |

| Criteria | Score/Rating | | | |
|---|---|---|---|---|
| | **Management** | | | |
| | **c.667** | **c.705** | **c.200** | **Cumulative** |
| Occupancy Rate | Operational Guidance | No Findings | No Findings | No Findings |
| | **c.667** | **c.705** | **c.200** | **Cumulative** |
| Tenant Accounts Receivable (TAR) | Corrective Action | Corrective Action | Corrective Action | Corrective Action |
| Board Member Training | No Findings | | | |
| Certifications and Reporting Submissions | No Findings | | | |
| Annual Plan | No Findings | | | |
| | **Financial** | | | |
| Adjusted Net Income | No Findings | | | |
| Operating Reserves | No Findings | | | |

Report Date: 08/29/2025 12:45:49

# EXECUTIVE OFFICE OF HOUSING AND LIVABLE COMMUNITIES (EOHLC)
## Staff Certification & Training Rating

| | |
|---|---|
| LHA Name | BOSTON HOUSING AUTHORITY |
| FYE | Mar 2025 |
| HMS Name | Melanie Loveland-Hale |
| FMS Name | Wilzor Exantus |

| Criteria | Rating |
|---|---|
| Staff Certification and Training | No Findings |

# EXECUTIVE OFFICE OF HOUSING AND LIVABLE COMMUNITIES (EOHLC)
# CFA Submission

| | |
|---|---|
| LHA Name | BOSTON HOUSING AUTHORITY |
| FYE | Mar 2025 |
| HMS Name | Melanie Loveland-Hale |
| FMS Name | Wilzor Exantus |

## CFA Submission

Rating: No Findings

Recommendations: 1. No Recommendations

# EXECUTIVE OFFICE OF HOUSING AND LIVABLE COMMUNITIES (EOHLC)
# PMR Desk Audit Recommendations Report

| | |
|---|---|
| LHA Name | BOSTON HOUSING AUTHORITY |
| FYE | Mar 2025 |
| HMS Name | Melanie Loveland-Hale |
| FMS Name | Wilzor Exantus |

## Occupancy

Rating All: No Findings
Rating 667: Operational Guidance
Rating 705: No Findings
Rating 200: No Findings

1. No Recommendations

## Tenant Accounts Receivable (TAR)

Rating All: Corrective Action
Rating 667: Corrective Action
Rating 705: Corrective Action
Rating 200: Corrective Action

1. Adhere to your rent collection policy and lease, i.e. sending notices, reminder letters, 14-day notice to quit, 30-day notice etc. Send notices to tenants early and frequently.
2. Create written repayment agreements, either in house or court ordered, and ensure they are adhered to.
3. Evaluate vacated balances to better understand what is collectible and what is unlikely to be collected and could be written off. Don't allow tenant balances to build-up before doing lease enforcement. Review aged receivables report regularly.
4. Set reasonable thresholds for commencing legal action.
5. HMS and LHA discussed the housing authority’s efforts to collect rents and enter into repayment agreements; HMS recommends LHA continue its efforts.

## Board Member Training

Rating: No Findings

1. No Recommendations

## Certifications and Reporting Submissions

Rating: No Findings

1. No Recommendations

## Annual Plan Submission

Rating: No Findings

1. No Recommendations

## Adjusted Net Income/Revenue

Rating: No Findings

### Revenue

1. No Recommendations

### Expense

#### Salaries

1. No Recommendations

#### Legal

1. No Recommendations

#### Utilities

1. No Recommendations

#### Maintenance

1. No Recommendations

### Other

1. No Recommendations

## Operating Reserve

Rating: No Findings

1. No Recommendations

# EXECUTIVE OFFICE OF HOUSING AND LIVABLE COMMUNITIES (EOHLC)

## CHAMP Close Out Report — Official Published PMR Record

| | |
|---|---|
| LHA Name | BOSTON HOUSING AUTHORITY |
| FYE | Mar 2025 |
| HMS Name | Melanie Loveland-Hale |
| FMS Name | Wilzor Exantus |

### CHAMP Criteria 1a

Rating: No Findings

Recommendations: 1. No Recommendations

### CHAMP Criteria 1b

Rating: Corrective Action

Recommendations: 1. Prioritize the intake of CHAMP Paper Applications to ensure that all CHAMP Paper Applications are date and timestamped.
2. Ensure that the date and timestamp are located in an area of the application that does not obscure the stamp.

### CHAMP Criteria 1c

Rating: No Findings

Recommendations: 1. Prioritize CHAMP Paper Application data entry to ensure that your LHA reduces the number of CHAMP Paper Applications entered more than 30 days from receipt. No more than 2% of CHAMP Paper Applications can be entered more than 30 days after date/timestamp.

### CHAMP Criteria 2a

Rating: Corrective Action

Recommendations: 1. Ensure that all vacancies are recorded in the EOHLC Housing Apps Vacancy Reporting System within 30 days of the vacancy date.
2. Establish reoccurring calendars reminders to help ensure vacancy data is entered into the EOHLC Housing Apps Vacancy Reporting System within 30 days.

### CHAMP Criteria 2b

Rating: Operational Guidance

Recommendations: 1. Ensure that all offers of housing were made using CHAMP for all units occupied in the Fiscal Year (Excluding Admin Transfers).
2. Ensure that all unit offer data is correctly entered into the EOHLC Housing Apps Vacancy Reporting System (Including Application ID, List Pull ID, Applicant Priority/Preference, and

Lease Start date)
3. Ensure that occupancy data entered into HAFIS references the CHAMP occupancy data.

| CHAMP Criteria 3a |
| --- |
| Rating: No Findings |

Recommendations: 1. No Recommendations

| CHAMP Criteria 3b |
| --- |
| Rating: No Findings |

Recommendations: 1. No Recommendations

| CHAMP Criteria 3c |
| --- |
| Rating: No Findings |

Recommendations: 1. No Recommendations

# EXECUTIVE OFFICE OF HOUSING AND LIVABLE COMMUNITIES (EOHLC)
# PMR Physical Condition Report

**For any questions on your FMS PMR Ratings, please contact your FMS.**

| | |
|---|---|
| LHA Name | BOSTON HOUSING AUTHORITY |
| FYE | Mar 2025 |
| HMS Name | Melanie Loveland-Hale |
| FMS Name | Wilzor Exantus |

Criteria 1: 100% of units inspected during FYE under review

Rating: No Findings

Recommendations:
1. Ensure that work orders are created, tracked, and completed for all deficiencies identified during unit inspection
2. Ensure that work orders are created, tracked, and completed for all Health and Safety deficiencies
3. Ensure that all work orders are completed in the appropriate timeframe or appropriately added to the DM/CIP
4. Ensure that all work orders for all Health and Safety deficiencies are completed in the appropriate timeframe
5. Note: Inspection Checklist number 3.13 Ventilation Fail, Water Faucet runs continuously. No work order was created.
6. Ensure that all deficiencies found at the time of unit inspection are included in Inspection Reports including tenant violations

Criteria 2: Unit inspection Reports create, track, and report Work Orders for inspection repairs, and Work Orders are completed within 30 days or added to DM/CIP

Rating: Corrective Action

Recommendations:
1. Ensure that work orders are created, tracked, and completed for all deficiencies identified during unit inspection
2. Ensure that work orders are created, tracked, and completed for all Health and Safety deficiencies
3. Ensure that all work orders are completed in the appropriate timeframe or appropriately added to the DM/CIP
4. Ensure that all work orders for all Health and Safety deficiencies are completed in the appropriate timeframe
5. Note: Inspection Checklist number 3.13 Ventilation Fail, Water Faucet runs continuously. No work order was created.
6. Ensure that all deficiencies found at the time of unit inspection are included in Inspection Reports including tenant violations

Criteria 3: Unit Inspection Reports accurately reflect necessary repairs

Rating: No Findings

Recommendations:
1. No Recommendations

Criteria 4: Work Orders created for every vacancy and completed within 30 days (or waiver requested)

Rating: No Findings

Recommendations: 1. No Recommendations

Criteria 5: Vacancy Turnover Work Orders accurately reflect necessary repairs

Rating: No Rating

Recommendations: 1. No Recommendations

Criteria 6: LHA Preventive Maintenance Plan accurately reflects all necessary work to maximize life of LHA components

Rating: No Findings

Recommendations: 1. No Recommendations

Criteria 7: All emergency work orders are created, tracked, reported and completed within 48 hours

Rating: No Findings

Recommendations: 1. Ensure that all Emergency Work Orders are created, tracked, and reported per EOHLC guidance
2. Ensure that all Emergency Work Orders are completed within 48 hours
3. LHA should create a list of emergency items and distribute to all staff, tenants and answering service if have one. Produce emergency work orders for any work that is on your emergency list and initiate work within 24 to 48 hours. See Handout J

Criteria 8: All requested work orders are created, tracked, reported and completed within 14 days or added to DM/CIP

Rating: No Findings

Recommendations: 1. No Recommendations

**Health & Safety Deficiencies**

Inspection reports were provided to the LHA at the time of the EOHLC site visit. Health and safety deficiencies were identified during the PMR Inspection. These items must be completed or initiated within 48 hours. Following completion of these health and safety deficiencies, the Executive Director must login to the FMS software application and certify, by electronic signature, that all health and safety deficiencies have been completed. Please contact your assigned FMS for further assistance.