Maintenance Plan Document (*FINAL Draft*)

04-24-2018 (Version)

The Maintenance Plan (MP) Document

Document consists of

➢ The Maintenance Plan Summary

   ➢ Pages 1 to 6 of the MP Document

➢ The Maintenance Schedules and Checklists

   ➢ Pages 7 to 24 of the MP Document

➢ Appendix

The Maintenance Plan Summary

➢ **Pages 1 to 6 of the MP Document**

➢ Fillable document (Word)

➢ Summary Document will be published, posted for general public.

➢ Part of the Ch 235 Annual Plan requirement.

➢ LHAs should review and complete (provide information requested

➢ Submit completed document to DHCD (with Annual Plan Submission)

The Maintenance Plan Checklist and Schedules

➢ **Pages 7 to 24 of the MP Document.**   Fillable document (Word, Excel)

➢ LHA **does not have a MP**, use template. Review, edit/modify

➢ LHA **does have a MP**, use its Maintenance Plan in lieu of template

➢ Fillable document (Word). Available in Excel

➢ Component details. ID maintenance task / schedule. Operations tool

➢ Helps satisfy the Maintenance Plan (MP) component of Annual Plan

➢ Separate Schedules & Checklists for

  ➢ Routine Maintenance, Preventive Maintenance and Inspections

➢ File completed documents. Submit as part of Annual Plan

  ➢ Annual Plan Submission commence during FYE DEC 2019 (details via PHN)

➢ For assistance, contact your RCAT PM

Appendix

➢   For LHA use.   <u>Not required to be submitted to DHCD</u>

➢   Fillable documents (Word, Excel)

    ➢   Appendix 1

        ➢   Development Information

    ➢   Appendix 2

        ➢   Major Renovation, Unusual Features

    ➢   Appendix 3

        ➢   Building Systems

    ➢   Appendix 4 (Word)

        ➢   Sample Policy Document

Maintenance Plan Document (*FINAL Draft*)

Revised 04-24-2018

Questions:

Contact your RCAT Office

    SE RCAT (Taunton)

    NE RCAT (Chelmsford)

    CW RCAT (Leominster)

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MAINTENANCE PLAN DOCUMENT – DESCRIPTION, INSTRUCTIONS

The **Maintenance Plan (MP) document** has separate **fillable sections** for the Maintenance Plan Summary and the Maintenance Schedules and Checklists.

1. **Maintenance Plan Summary (in Word)**
   a. **Statement of Priorities**
      - Definitions of Emergency, Vacancy Refurbishment, Preventive Maintenance, Programmed Maintenance, Requested Maintenance.
   b. **Emergency Response Standard Operating Procedure or SOP**
      - How the Housing Authority **(HA)** responds to an emergency call and how the Staff and Residents are informed about what constitutes an Emergency.
   c. **Normal Maintenance Response SOP**
      - How the Housing Authority **(HA)** responds to a Regular Maintenance Call (a non-emergency) and how the Staff and Residents are informed about what constitutes a Regular Maintenance Call.
   d. **Maintenance Plan Narrative**
      - A summary of Budgets and Deferred Maintenance.
   e. **Work Order Management**
      - How Work Orders are managed by the **HA**.

2. **Maintenance Schedules and Checklists (Word, Excel file is available).**
   a. **Work Plan for Preventive and Routine Maintenance, and Inspections**
      - A Schedule and Checklist of various Maintenance and Inspections items.
      - The Checklist items and the Schedule (when work is performed) are both editable by the **HA and Maintenance** to suit specific local conditions and procedures.

Appendix

i.   Appendix 1 – Development Information (667, 689, or 705). **(Word, Excel file is available).**

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

ii. Appendix 2 – Renovation Details and Unusual Features **(Word, Excel file is available).**

iii. Appendix 3 – Building Systems **(Word, Excel file is available).**

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

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

iv. Appendix 4 – Maintenance Policy (Sample; Word document)

   This should be edited by the **HA**

SECTION 1 – MAINTENANCE PLAN SUMMARY

Instructions

1. LHAs should review and complete this document by providing the information requested.
2. The completed document should be kept on file by the LHA and submitted as part of the Annual Plan submission *(Roll-out Memorandum will explain)*

> ➢ **LHAs should review and complete the document by providing the information requested.**
>
> ➢ **Submit the completed document to DHCD as part of the Annual Plan Submission.**
>
> ➢ **Annual Plan Submission commence during FYE DEC 2019 (details via PHN)**

Housing Authority General Maintenance & Repair Statement of Priorities

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

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

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

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

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

Note: If the LHA has any examples, please list them below with any other additional comments.

Additional LHA comments/content:

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

Emergency Response System – Two Key Parts:

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

System for Responding to Emergencies:

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

YES	NO

2. List of Emergencies.

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

EMERGENCY
Fires of any kind
Gas leaks
Electric power failures
Elevator stoppage
Broken water pipes
Sewer blockage
Roof drain blockage
Roof leak
Security lock failure
Lock outs
No heat
Inoperative refrigerator
Snow or ice storm
Other/Write In (for the addition of any additional items)

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

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

METHOD	CONTACT INFO.	TIMES
Can Text Phone Number during following hours	123-456-7890	XX AM to XX PM
Can Call (Answering Service) at Phone Number	123-456-7890	XX AM to XX PM and XX PM to XX AM
Can Call LHA at Phone Number	123-456-7890	XX AM to XX PM
Can Submit Online at Website	www.anytownhousing.com	XX AM to XX PM
Can Email to Following Email	Name.name@domain.com	XX AM to XX PM
Other	Xxxxxxxxxxxxxxxxxxxxxxxxx	xxxxxxxxxxxxxxxxxxxxxxxxxxxx

4. Has LHA distributed this Emergency Contact procedure to:

	YES	NO
Tenants		
Staff		
Answering Service (if applicable)		

Normal Maintenance Response System-Standard Operating Procedure (SOP)

Non-Emergency Response System:

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

System for Responding to Non-Emergencies:

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

YES	NO

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

METHOD	CONTACT INFO.	TIMES
Can Text Phone Number during following hours	123-456-7890	XX AM to XX PM
Can Call (Answering Service) at Phone Number	123-456-7890	XX AM to XX PM and XX PM to XX AM
Can Call LHA at Phone Number	123-456-7890	XX AM to XX PM
Can Submit Online at Website	www.anytownhousing.com	XX AM to XX PM
Can Email to Following Email	Name.name@domain.com	XX AM to XX PM
Other	Xxxxxxxxxxxxxxxxxxxxx	xxxxxxxxxxxxxxxxxxxxxxxxxxxxx

3. Has LHA distributed this Contact procedure to:

	YES	NO
Tenants		
Staff		
Answering Service (if applicable)		

Maintenance Plan Narrative

Narrative Question # 1	How would you assess your Maintenance Operations based on feedback your received from staff, tenants, DHCD (PMR & AUP), and any other sources?

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

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

Maintenance Budget Summary			
	Overall Budget	Extraordinary Maintenance	Date
Current Fiscal Year Budget			
Current Fiscal Year Spent to date			
This upcoming Fiscal year Budget			

Unit Turnover Summary	
# Turnovers last Fiscal year	
Average time to make Unit "Maintenance Ready"	
Average time to Lease –up unit	

Additional LHA comments/content:

Work Order Management

LHA Uses the following type of Work Order System to record and track all work completed.		
Type of Work Order System	**Check One**	**Comments**
Computer Software System-Web Based (e.g. PHA Network, HAB, PHA-Web, etc.)		
Computer Software System-Non-Web based (e.g. SHARP (MS Access), MS Excel, MS Word, etc.)		
Manual System—Please specify in Comments section		
Other-Please Specify in Comments section		

Work orders are created using the following types/categories: (check all that apply)	
Emergency	
Vacancy	
Preventive Maintenance	
Inspections	
Routine	
Tenant Requests	
Other-Please specify	

Work Order Process:

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

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

SECTION 2 – MAINTENANCE SCHEDULES AND CHECKLISTS

Instructions

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

LHA should Edit / modify the Tasks, Frequency, By, and Schedule (Annual, Bi-Annual, Monthly, Weekly, Daily) as required for the Developments	**If your LHA has a MAINTENANCE PLAN, then this is** ➢ **NOT REQUIRED**

Routine Maintenance Schedule and Checklist

This includes:

➢ **Landscaping & Grounds**
- ▪ **Trash**
- ▪ **Mowing**
- ▪ **Leaves**
- ▪ **Snow removal**
- ▪ **Seasonal cleaning (Spring & Fall)**

➢ **Inventory, Meetings, Training, Tools**
- ▪ **Maintain Sharpen Tools**
- ▪ **Attend Training, Meetings**
- ▪ **Maintain HA Inventory**

➢ **Building Interior**
- ▪ **Hallways, Lobbies, Stairs**
- ▪ **Toilets**
- ▪ **Offices**
- ▪ **Elevators**
- ▪ **Trash Chutes**

Routine Maintenance Schedule and Checklist

LHA NAME:				DEVELOPMENT:										

Landscaping and Grounds Routine Maintenance

TASK	Frequency	By	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Walk property-pick up trash	Daily	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Mow lawn (Mulching lawnmower); edge if needed	Weekly / Seasonal	Staff				X	X	X	X	X	X	X		
Rake leaves (Fall, Spring)	Bi-Annually	Staff / Vendor				X						X		
Snow (Shovel, Plow), Treat (Walkways)	Daily / Seasonal	Staff / Vendor	X	X	X								X	X
Seasonal cleaning (Spring and Fall)	Start & End of Season					X						X		

SLIDE 24

Routine Maintenance, both pages are included

Building Routine Maintenance														
Building Interior														
TASK	Frequency	By	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Hallways, Stairs, Lobbies, Community Rm - Vacuum carpet, mop floors, sweep and Vacuum public spaces	Weekly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Wash windows in public areas	Weekly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Toilets - Clean public toilets/restrooms	Daily / Weekly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Clean Staff toilets/restrooms	Daily / Weekly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Offices- Sweep / Vacuum offices	Weekly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Light Bulbs - Replace if burnt out in common areas and offices	Monthly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Elevators- Clean cab walls and doors	Daily / Weekly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Sweep / Mop / Vacuum elevator floors	Daily / Weekly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Trash Chutes, Dumpsters- Clean trash chutes	Daily / Weekly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Clean dumpster areas	Twice a week	Staff	X	X	X	X	X	X	X	X	X	X	X	X

Other Routine Maintenance														
Inventory, Meeting, Training, Tools														
TASK	Frequency	By	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Maintain Authority inventory	Quarterly	Staff			X			X			X			X
Attend Staff meetings	Quarterly	Staff			X			X			X			X
Attend Training sessions	Annual	Staff				X								
Clean and sharpen tools	Monthly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Sharpen mower blades (after each Mowing)	Weekly / Monthly	Staff				X	X	X	X	X	X			

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

Preventive Maintenance Schedule and Checklist

This includes:

- **Building Envelope**
  - **Roofs, Walls, Windows, Doors, Foundations, Decks.**

- **Building Interior**
  - **Floors, Ceilings, Walls, Pest Control**

- **Grounds**

- **MEP**
  - **Sprinkler, Lighting, HVAC, Generator, Security, FA, etc**
- **Apartment / Dwelling Unit**
  - **Walls, Floors, Ceilings, Smoke Detectors, HVAC, Kitchen, etc**

- **Vehicles**

- **Small Engines**

Preventive Maintenance Schedule and Checklist

LHA NAME:		DEVELOPMENT:													

Buildings & Grounds Preventive Maintenance

Building Envelope

TASK	Frequency	By	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
FLAT ROOF - Clear drains/scuppers, debris	Monthly / Bi-Annually	Staff / Vendor	X	X	X	X	X	X	X	X	X	X	X	X
Check cracks, water pooling, leaks, flashing	Monthly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Reseal Joints	Every 5yrs	Vendor					X							
SLOPED ROOF - Remove moss, clear debris from gutters / downspouts	Bi-Annually	Staff / Vendor				X						X		
Recaulk roof flashing	Every 2 Yrs / As Needed	Staff / Vendor				X								
WALLS - Repair mortar joints, Replace Bricks (as needed)	Annually / As Needed	Staff / Vendor				X								
WINDOWS - Wash, re-caulk if needed	Annually	Staff / Vendor				X								
DOORS - Wash, check weather stripping, re-paint as needed	Annually	Staff				X								
DECKS, EXT STAIRS - Wash	Annually	Staff				X								
FOUNDATION - Check cracks, vent covers	Annually	Staff				X								
EXTERIOR SURFACES, FIXTURES - Refinish	Every 10yrs	Staff / Vendor												

Inspection Schedule – Buildings, Grounds and Units

This includes:

- ➢ **Building Envelope**
  - ▪ **Roofs, Walls, Windows, Doors, Foundations, Decks.**

- ➢ **Building Interior**
  - ▪ **Floors, Ceilings, Walls, Pest Control**

- ➢ **Common Kitchen, Laundry**

- ➢ **Trash / Recycling Room**

- ➢ **Landscaping, Grounds**
- ➢ **MEP**
  - ▪ **Sprinkler, Lighting, HVAC, Generator, Security, FA, etc**

- ➢ **Vehicles, Small Engines**

- ➢ **Apartment / Dwelling Unit**
  - ▪ **Walls, Floors, Ceilings, Smoke Detectors, HVAC, Kitchen, etc**

Inspections Schedule and Checklist															
LHA NAME:				**DEVELOPMENT:**											

Buildings & Grounds Inspections

Building Envelope

TASK	Frequency	By	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
ROOFS - Sloped/Flat and EPDM/Shingle/Metal	Bi-Annually / Annually	Staff				X						X		
ROOFS - Cracks, water pooling, leaks, flashing	Bi-Annually / Annually	Staff				X						X		
WALLS - Brick, Vinyl, Shingle	Annually	Staff				X								
WINDOWS, DOORS - Seals, Operators	Annually	Staff				X								
DECKS, EXT STAIRS - Wash	Annually	Staff				X								
FOUNDATIONS - Cracks, vent covers	Annually	Staff				X								

Building Interior

TASK	Frequency	By	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
FLOORS - Wood, Vinyl, Carpet	Annually	Staff				X								
CEILINGS	Annually	Staff				X								
WALLS	Annually	Staff				X								

Pest Control

TASK	Frequency	By	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
PEST CONTROL - Pests	Monthly / As Needed	Vendor	X	X	X	X	X	X	X	X	X	X	X	X

Common Kitchen, Laundry

TASK	Frequency	By	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
KITCHEN - Inspect Appliances	Annually	Staff										X		
GAS STOVE - Inspect	Annually	Vendor										X		
Kitchen, Bath - Cabinets, fixtures	Annually	Staff										X		
LAUNDRY - Machines operational	Bi-Annually	Staff				X						X		

Trash / Recycling Room

TASK	Frequency	By	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Trash Container leaks	Monthly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Trash Chute doors	Monthly	Staff	X	X	X	X	X	X	X	X	X	X	X	X
Trash / Recycle Cans	Weekly / Bi-Monthly	Staff	X	X	X	X	X	X	X	X	X	X	X	X

Dwelling Unit Inspections Schedule and Checklist															
LHA NAME:			**DEVELOPMENT:**												
TASK	Frequency	By	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Pondside Court			I	I	I	I	I	I	I	I	I	I	I	I
Buildings 1 & 2	Annually	Staff	X											
Buildings 3 & 4	Annually	Staff		X										
Buildings 5 & 6	Annually	Staff			X									
Buildings 7 & 8	Annually	Staff				X								
Valley Terrace														
Buildings 1 & 2	Annually	Staff					X							
Buildings 3 & 4	Annually	Staff						X						
Buildings 5 & 6	Annually	Staff							X					
Buildings 7 & 8	Annually	Staff								X				
Scattered Sites														
101 Pembroke St.	Annually	Staff									X			
62 Apple Lane	Annually	Staff									X			
27 Peach Street	Annually	Staff										X		
Heat and smoke detectors														
TASK	Frequency	By	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Battery Heat / Smoke Detectors - Inspect Condition	Bi-Annually / Annually	Staff				X					X			
Inspect System Heat detectors (in Units)	Bi-Annually / Annually	Vendor				X					X			
Pest control														
Inspect Unit	Monthly / Quarterly	Vendor	X	X	X	X	X	X	X	X	X	X	X	X
Floors, Ceilings, Walls														
Floors (Wood, Vinyl, Tile)	Bi-Annually / Annually					X					X			
Kitchen fixtures														
KITCHEN - Inspect Appliances	Bi-Annually / Annually	Staff				X					X			
GAS STOVE - Inspect	Bi-Annually / Annually	Vendor									X			
Kitchen, Bath - Cabinets, fixtures	Bi-Annually / Annually	Staff				X					X			
HVAC fixtures														
(Heat Pumps, Bath Fans, Forced Hot Air, Baseboard)														
Fans, Baseboard, Vents - Inspect (dust, debris)	Annually	Staff				X					X			

- ➢ **The Appendix is for LHA use (Maintenance, Modernization Staff).**

- ➢ **The Appendices are <u>not required</u> to be submitted to DHCD.**

- ➢ **The Appendices are to assist in collecting, documenting and organizing information (LHA developments / buildings, as well as heating, hot water and other building systems).**

- ➢ **This information will inform the Maintenance Schedules and Checklists, and help with management of operations.**

- ➢ **The information could be developed over time.**

APPENDIX

1. Development Information (5 Developments per Page)
2. Renovation Details, Unusual Features
3. Building Systems
4. Maintenance Policy

General Information

A. LHAs should use
   i. Appendix 1 to document the various Developments at the LHA
   ii. Appendix 2 to document Renovation Details, Unique Features
   iii. Appendix 3 to document the Building Systems at the various Developments.

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

B. LHAs could use a 3-ring binder to
   i. File Appendix 1, Appendix 2 and Appendix 3.
   ii. File any information (Equipment information, Owner/User Manuals, copies of Warranties, etc) from completed projects.
   iii. The 3-ring binder will contain pertinent information regarding building systems (Roofs, Mechanical, Electrical, Fire Alarm, etc) at the various developments

Appendix 1 – Development Information

Instructions

1. Use this Appendix to document information on systems at LHA Developments.
2. The Development Information sheet has space for five (5) developments (705, 667, 689) per page (3 pages are provided)
    ❖ LHAs with more than 15 developments, please print or copy an extra sheet and number the pages accordingly

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

<u>Using Appendix 1 – An Example</u>
➢ *Brimfield HA has four (4) building;*
   ❖ *-Three (3) residential and*
   ❖ *One (1) Community Building.*
➢ *One Development Information sheet would be used.*

CATEGORIES
No of Floors
No of Units
Facilities
Storage
Roof Systems
Building Systems
Fire Safety Systems
Heat
Hot Water

➢ **Fillable document (Word)**
 ▪ **5 Developments per Page**
 ▪ **Three (3) pages are provided (15 Developments).**
 ▪ **For additional Developments, copy the page**

➢ **Excel version is available**
 ▪ **Separate file**
 ▪ **Four (4) pages are provided (20 Developments)**

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

Appendix 2 –
Development Renovation Details, Unusual Features

Instructions

This Appendix is provided for Renovation Details and Unusual Features at the Developments.

> ➢ **Fillable document (Word)**
> - ▪ **4 Developments per Page**
> - ▪ **For additional Developments, copy the page**
>
> ➢ **Excel version is available**
> - ▪ **Separate file**
> - ▪ **One (1) page is provided**

Major Renovations	
Year	**Details**
Click here to enter text.	Click here to enter text.
Click here to enter text.	Click here to enter text.
Click here to enter text.	Click here to enter text.
Click here to enter text.	Click here to enter text.

Unusual Development Features	
Development No and Address	**Details**
Click here to enter text.	Click here to enter text.
Click here to enter text.	Click here to enter text.
Click here to enter text.	Click here to enter text.
Click here to enter text.	Click here to enter text.

Appendix 3 – Building Systems

Instructions

1. This Appendix provides information on various building components (building systems) at the LHAs developments.
2. Equipment Serial and Model Numbers could be collected when new equipment is installed.
3. The information could be filed in a 3-ring binder.

> ➢ **Fillable document (Word)**
> > ➢ **Excel version is available as a separate file**
> ➢ **Includes**
> ▪ **Heating systems, Hot systems, Pumps, Roof systems, Fire Protection systems, Emergency / Standby Power, Elevators / Chair Lifts, GFCI, Arc Fault Protection, Electric Panels, Exterior and Common Lighting**

CATEGORIES	
What, How Many, Install Date, Warranty, Service Company	
Heating Systems	Electric, Oil / Gas, Co-Gen, Geo-Thermal (and DHW)
Heating Equipment Information	Electric, Oil / Gas, etc
Hot Water System	Electric, Oil, Gas
Hot Water Equipment Information	Electric, Oil / Gas, etc
Pumps	Drinking Water, Sump,, Basement Flood, Area Flood, Elevator Pit,
Pump Equipment Information	Shingle, EPDM, Metal, BUR,
Fire Protection (Sprinklers and FA)	Addressable, Monitored (Phone/Cell, Radio), Wet/Dry Sprinklers, Fire Pump
Emergency / Standby Power Systems	Diesel, Gas, Size, Location
Elevator / Chair Lifts	Hydraulic, Traction,
GFCI, Arc Fault, Electric Panels	Installed Locations, Size,
Exterior and Common Lighting	Incandescent, LED (Arrays, Medium Base), Halogen, LPS/HPS, etc

3.1 HEATING SYSTEMS

3.1.1 Electric Heat						
Heating System	Baseboard		Wall Heater		Heat Pumps	
1 Unit per 1 Apartment	Yes ☐	No ☐	Yes ☐	No ☐	Yes ☐	No ☐
1 Unit per Building	Yes ☐	No ☐	Yes ☐	No ☐	Yes ☐	No ☐
Serviced by:	Serviced by (Phone #):		On-Call Contract			
			Yes: ☐ No: ☐			
			Yes: ☐ No: ☐			

3.1.2 Oil / Gas Heat		
Heating System	Oil-Fired	Gas-Fired
Heating System	☐	☐
1 Unit per 1 Apartment	Yes ☐	No ☐
1 Unit per Building	Yes ☐	No ☐
Serviced by:	Serviced by (Phone #):	On-Call Contract
		Yes: ☐ No: ☐
		Yes: ☐ No: ☐

3.1.3 Cogeneration and Geothermal		
Heating System	Oil-Fired	Gas-Fired
Heating System	☐	☐
1 Unit per 1 Apartment	Yes ☐	No ☐
1 Unit per Building	Yes ☐	No ☐
Serviced by:	Serviced by (Phone #):	On-Call Contract
		Yes: ☐ No: ☐
		Yes: ☐ No: ☐

Appendix 4 – Maintenance Policy
Sample

INSTRUCTIONS

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

➢ **Editable document (Word)**

Maintenance Plan (Program and Policy)

1. Introduction

2. Staffing

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

4. Routine Maintenance

5. Annual Unit Inspections

6. Preventive Maintenance

   - Fire Protection

   - Roof

- Exterior Masonry

- Space Heating

- Domestic Hot Water

- Plumbing & Electrical Repairs

- Extermination/Pest Control

7. Vacancy Turnaround

8. Maintenance Charges

9. Definition of Maintenance Emergencies

Maintenance Plan (Program and Policy)

1. **Introduction**

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

Description of YHA Developments (1 paragraph per development)

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

2. **Staffing**

This site has 2 PT maintenance staff.

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

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

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

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

4. **Routine Maintenance**

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

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

Questions?