



Cathy Sheehan, Executive Director

2025 NOV 13 AM 8:04

CITY CLERK
SALEM, MASS

Main Office and Public Housing Department
27 Charter Street, Salem, MA 01970

Section 8 Department & Procurement/Modernization
136 Canal Street, Suite 2, Salem, MA 01970

Telephone: 978-744-4431 Fax: 978-744-9614
Website: www.salemha.org

November 13, 2025

Ilene Simons, City Clerk
Office of the Clerk
City Hall, 93 Washington Street
Salem, MA 01970

**This notice posted on "Official Bulletin Board"
City Hall, Salem, Mass. on Nov. 13, 2025
at 8:04 AM in accordance with MGL Chap. 30A
Sections 18-25.**

Dear Ms. Simons:

In accordance with Chapter 30A, Section 20 of the General Laws, as amended, Notice of SPECIAL MEETING OF THE BOARD OF DIRECTORS of the SALEM HOUSING AUTHORITY to be held on WEDNESDAY, NOVEMBER 19, 2025 at 6:00 p.m. at the Salem Housing Authority's development located at 27 Charter Street, Community Room, Salem, Massachusetts.

Hybrid Meeting Notice: Members of the public are welcome to attend this in-person at the Salem Housing Authority's development located at 27 Charter Street, Community Room, Salem, Massachusetts, or via the remote zoom webinar invite provided below. Please note that the in-person meeting will not be suspended or terminated if technological problems interrupt the remote connection.

You are invited to a Zoom Webinar:

When: Nov 19, 2025 06:00 PM Eastern Time (US and Canada)
Topic: Special Meeting of the Board of Directors of the Salem Housing Authority

Join from PC, Mac, iPad, or Android:
<https://us02web.zoom.us/j/86734059460?pwd=s49tvZdD75jeGOrFNRWgfsoalzZd1D.1>
Passcode:802375

Phone one-tap:
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+1 346 248 7799 US (Houston)
+1 360 209 5623 US
+1 386 347 5053 US
+1 507 473 4847 US
+1 564 217 2000 US
Webinar ID: 867 3405 9460
Passcode: 802375
International numbers available: <https://us02web.zoom.us/j/86734059460>

2025 NOV 13 AM 8:04

CITY CLERK
SALEM, MASS

**This notice posted on "Official Bulletin Board"
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at 8:04 AM in accordance with MGL Chap. 30A
Sections 18-25.**

The Chair anticipates that the matters outlined in the agenda below will be addressed, as well as any other unforeseen business that may lawfully come before it.

**AGENDA FOR THE
SPECIAL BOARD OF DIRECTORS MEETING
WEDNESDAY, NOVEMBER 19, 2025
6:00 p.m.**

- I. Call Meeting to Order**
- II. Roll Call**
- III. Acceptance of the Minutes of Previous Meeting(s)**
 - Acceptance of Minutes of the Regular Meeting of October 8, 2025
- IV. Tenant/Public Engagement**
- V. Report of the Executive Director**
 - Executive Director Report – November 2025
- VI. Communications**
 - Updated Waitlist
 - SHA Department Reports (Move In, Move Out, State and Federal,
 - CHAMP Report, Modernization Report, Voucher Report, Family Self-Sufficiency Report (Quarterly), Resident Service Coordinators' Reports and Completed Work Orders for Month of October 31, 2025)
 - Performance Evaluation for Cathy Hoog
- VII. Reports of the Committees**

VIII. Recommendations of the Chair

IX. Report of the Treasurer

- Bills for the period October 1, 2025 through October 31, 2025

X. Unfinished Business

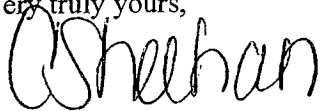
XI. New Business

- Year End Submissions - Quarterly Operating Statements (Quarter Ending 9/30/25) and Year End Financial Statements (FYE 9/30/25) for Programs 4001 and MRVP
- Fiscal Year End 9/30/2025 Certification of Top 5 Compensation Form
- Certification of Compliance with Notification Procedures for Federal and State Lead Paint Laws
- Request For Proposals – Development Consulting Services for the Redevelopment of 17-27 First Street, Salem, MA
- Request For Proposals – Legal Services
- New Hire – Section 8 Housing Coordinator
- Wage Match Guidelines – Certification
- Amendment #21 to the Contract for Financial Assistance (CFA) 5001 for Project 258150 Electrical Upgrades in the amount of \$125,000.00.
- Certificate of Substantial Completion for EOHLC Project 258187 ARPA FF Siding and Window Replacement at Farrell Court
- Section 8 Management Assessment Plan (SEMAP)
- Annual Holiday Employee Luncheon

XII. Other Business /Late Communications

XIII. Adjournment

Very truly yours,



Cathy Sheehan
Executive Director

**This notice posted on "Official Bulletin Board"
City Hall, Salem, Mass. on Nov. 13, 2025
at 8:04 Am in accordance with MGL Chap. 30A
Sections 18-25.**

Copy: SHA Board Members
Charter Street Tenants Association
Pioneer/Bertram Terrace Tenants Organization
Dalton House Tenants Organization
Rainbow Terrace Tenants Organization

2025 NOV 13 AM 8:04

CITY CLERK
SALEM, MASS

3 de noviembre de 2025

Ilene Simons, Secretaria Municipal
Oficina de la Secretaria
Ayuntamiento, 93 Washington Street
Salem, MA 01970

2025 NOV 13 AM 8:04

CITY CLERK
SALEM, MASS

Estimada Sra. Simons:

De conformidad con el Capítulo 30A, Sección 20 de las Leyes Generales, según enmendadas, se notifica la CONVOCATORIA A LA REUNIÓN ESPECIAL DE LA JUNTA DIRECTIVA DE LA AUTORIDAD DE VIVIENDA DE SALEM, que se celebrará el MIÉRCOLES 19 DE NOVIEMBRE DE 2025 a las 18:00 horas en el complejo de la Autoridad de Vivienda de Salem, ubicado en 27 Charter Street, Salón Comunitario, Salem, Massachusetts.

Aviso sobre la modalidad híbrida de la reunión: El público está invitado a asistir presencialmente en el complejo de la Autoridad de Vivienda de Salem, ubicado en 27 Charter Street, Salón Comunitario, Salem, Massachusetts, o a través del enlace de Zoom que se adjunta a continuación. Tenga en cuenta que la reunión presencial no se suspenderá ni se cancelará si se presentan problemas técnicos que interrumpan la conexión remota.

Le invitamos a un seminario web por Zoom:

Fecha: 19 de noviembre de 2025, 18:00 (hora del este de EE. UU. y Canadá)

Tema: Reunión especial de la Junta Directiva de la Autoridad de Vivienda de Salem

Únase desde su PC, Mac, iPad o dispositivo Android:

<https://us02web.zoom.us/j/86734059460?pwd=s49tvZdD75jeGOrFNRWgfsoalzZd1D.1>

Código de acceso: 802375

Acceso telefónico con un solo toque:

+13092053325,,86734059460#,,,,*802375# (EE. UU.)

+13126266799,,86734059460#,,,,*802375# (EE. UU., Chicago)

Únase por audio:

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at 8:04 AM in accordance with MGL Chap. 30A,
Sections 18-25.**

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+1 669 444 9171 EE. UU.

+1 669 900 9128 EE. UU. (San José)

+1 689 278 1000 EE. UU.

+1 719 359 4580 EE. UU.

+1 253 205 0468 EE. UU.

+1 253 215 8782 EE. UU. (Tacoma)

+1 346 248 7799 EE. UU. (Houston)

+1 360 209 5623 EE. UU.

+1 386 347 5053 EE. UU.

+1 507 473 4847 EE. UU.

+1 564 217 2000 EE. UU.

ID del seminario web: 867 3405 9460

Código de acceso: 802375

Números internacionales disponibles: <https://us02web.zoom.us/j/86734059460>

La Presidencia prevé que se abordarán los asuntos que figuran en el orden del día a continuación, así como cualquier otro asunto imprevisto que pueda presentarse legalmente.

**ORDEN DEL DÍA DE LA REUNIÓN EXTRAORDINARIA DEL CONSEJO DE
ADMINISTRACIÓN
MIÉRCOLES, 19 DE NOVIEMBRE DE 2025 18:00 h**

I. Apertura de la sesión

II. Lista de asistencia

III. Aprobación del acta de la(s) reunión(es) anterior(es)

- Aprobación del acta de la reunión ordinaria del 8 de octubre de 2025

IV. Participación de los inquilinos y del público

V. Informe del Director Ejecutivo

- Informe del Director Ejecutivo – Noviembre de 2025

VI. Comunicaciones

2025 NOV 13 AM 8:05

CITY CLERK
SALEM, MASS

**This notice posted on "Official Bulletin Board"
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at 8:05 AM in accordance with MGL Chap. 30A
Sections 18-25.**

- Lista de espera actualizada

2025 NOV 13 AM 8:05

- Informes de los departamentos de la SHA (Entrada, Salida, Estatal y Federal)
- Informe CHAMP, Informe de Modernización, Informe de Vales, Informe Trimestral de Autosuficiencia Familiar, Informes de los Coordinadores de Servicios para Residentes y Órdenes de Trabajo Completadas al 31 de octubre de 2025)

CITY CLERK
SALEM, MASS

- Evaluación del desempeño de Cathy Hoog

VII. Informes de los comités

VIII. Recomendaciones del Presidente

IX. Informe del Tesorero

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Sections 18-25.

- Facturas del período comprendido entre el 1 y el 31 de octubre de 2025

X. Asuntos pendientes

XI. Nuevos Negocios

- Presentaciones de Fin de Año: Estados de Resultados Trimestrales (Trimestre que finaliza el 30/09/2025) y Estados Financieros de Fin de Año (FY 30/09/2025) para los Programas 4001 y MRVP

- Formulario de Certificación de Compensación de los 5 Mejores Empleados al cierre del ejercicio fiscal 30/09/2025

- Certificación de Cumplimiento con los Procedimientos de Notificación de las Leyes Federales y Estatales sobre Pintura con Plomo

- Solicitud de Propuestas: Servicios de Consultoría para el Desarrollo del inmueble ubicado en 17-27 First Street, Salem, MA

- Solicitud de Propuestas: Servicios Legales

- Nueva Contratación: Coordinador/a de Vivienda de la Sección 8

- Directrices para la Igualación Salarial: Certificación

- Enmienda n.º 21 al Contrato de Asistencia Financiera (CFA) 5001 para el Proyecto 258150: Mejoras Eléctricas por un monto de \$125,000.00. - Certificado de finalización sustancial del proyecto EOHLC 258187: Reemplazo de revestimiento y ventanas ARPA FF en Farrell Court

- Plan de evaluación de gestión de la Sección 8 (SEMAP)

- Almuerzo anual de empleados durante las fiestas

XII. Asuntos varios / Comunicaciones tardías

XIII. Clausura

2025 NOV 13 AM 8:05

Atentamente,



Cathy Sheehan
Directora Ejecutiva

CITY CLERK
SALEM, MASS

Copia: Miembros de la Junta Directiva de SHA
Asociación de Inquilinos de Charter Street
Organización de Inquilinos de Pioneer/Bertram Terrace
Organización de Inquilinos de Dalton House
Organización de Inquilinos de Rainbow Terrace

This notice posted on "Official Bulletin Board"
City Hall, Salem, Mass. on *NOV 13, 2025*
at *8:05 AM* in accordance with MGL Chap. 30A
Sections 18-25.



Cathy Sheehan, Executive Director

Main Office and Public Housing Department
27 Charter Street, Salem, MA 01970

Section 8 Department & Procurement/Modernization
136 Canal Street, Suite 2, Salem, MA 01970

Telephone: 978-744-4431 Fax: 978-744-9614
Website: www.salemha.org

**DISCUSSIONS FOR THE
SPECIAL MEETING OF THE BOARD OF DIRECTORS
WEDNESDAY, NOVEMBER 19, 2025
6:00 p.m.**

I. Call Meeting to Order

II. Roll Call

Present

Absent

Also Present:

III. Minutes of Previous Meeting(s)

() moves to accept the Minutes of the Regular Meeting held on Wednesday, October 8, 2025. () seconds the motion and the vote is as follows:

Ayes

Nays

IV. Tenant/Public Engagement

V. Report of the Executive Director

- See Executive Director's Report Attached – November 2025

VI. Communications

- Mass NAHRO Newsletter – September/October
- Updated Waitlist
- SHA Department Reports (Move In, Move Out, State and Federal, CHAMP Report, Modernization Report, Voucher Report, Family Self-Sufficiency Report,



- Resident Service Coordinator Reports, and Completed Work Orders for Month of October 2025)
- Executive Director Performance Evaluation

VII. Reports of the Committees

VIII. Recommendations of the Chair

IX. Report of the Treasurer

Bills

() moves to approve the bills for the period October 1, 2025 through October 31, 2025 as presented. () seconds the motion and the **roll call** vote is as follows:

Ayes

Nays

X. Unfinished Business

XI. New Business

Year End Submissions

Quarterly Operating Statements (Quarter Ending 9/30/25) and Year End Financial Statements (FYE 9/30/25) for Programs 4001 and MRVP

Cathy Sheehan will present the Quarterly Operating Statements (Quarter Ending 9/30/25) and Year End Financial Statements (FYE 9/30/25) for Programs 4001 and MRVP and request signatures for same.

() moves to accept the Quarterly Operating Statements (Quarter Ending 9/30/25) and Year End Financial Statements for Fiscal Year Ending 9/30/25 for Programs 4001 and MRVP. () seconds the motion, and the **roll call** vote is as follows:

Ayes

Nays

Fiscal Year End 9/30/2025 Certification of Top 5 Compensation Form

In accordance with the request of EOHLC Cathy Sheehan will submit to the Board the Fiscal Year End 9/30/2025 Certification of Top 5 Compensation Form. Cathy Sheehan will submit the Top 5 Compensation Form to EOHLC together with said Certification.

() moves to certify and execute Fiscal Year End 9/30/2025 Top 5 Compensation Form as submitted by Cathy Sheehan for the Salem Housing Authority to be submitted with

year-end documentation. () seconds the motion and the **roll call** vote is as follows:

Ayes

Nays

Certification of Compliance with Notification Procedures for Federal and State Lead Paint Laws

The Executive Director will present the Certification of Compliance with Notification Procedures for Federal and State Lead Paint Laws.

() moves to certify and execute the Certification of Compliance with Notification Procedures for Federal and State Lead Paint Laws as submitted by Cathy Sheehan, Executive Director for the Salem Housing Authority to be submitted with year end documentation. () seconds the motion and the **roll call** vote is as follows:

Ayes

Nays

Request For Proposals – Development Consulting Services for the Redevelopment of 17-27 First Street, Salem, MA

Cathy Sheehan will present to the Board of Directors the price proposal from Emily P. Achtenberg for Development Consulting Services for the redevelopment of 17-27 First Street, Salem, MA.

() moves to accept the price proposal from Emily P. Achtenberg for Development Consulting Services, for the redevelopment of 17-27 First Street, Salem, MA dated October 15, 2025. () seconds the motion and the roll call vote is as follows:

Ayes

Nays

Request For Proposals – Legal Services

Cathy Sheehan will present to the Board of Directors the most advantageous Request For Proposals for Legal Services from Casey Lundregan & Burns, P.C. Two RFPs were received and those RFPs were emailed to the Board of Directors under separate cover due to how voluminous the RFPs were.

() moves to accept the most advantageous proposal for Legal Services from Casey Lundregan Burns, P.C. Attorneys at Law for one year with 2- 1 year options to renew at the sole discretion of the Salem Housing Authority. Pricing is attached as part of the proposal.

Ayes

Nays

New Hire – Section 8 Housing Coordinator

There were four (4) candidates chosen to be interviewed for the open position of Section 8 Housing Coordinator. Jacqueline Guzman and Sabrina Eschman interviewed the candidates. A second interview was held with the candidates most qualified for the position. Cathy Sheehan, and Jacqueline Guzman conducted said interviews. Cathy will present the candidate of her choice.

() moves to make a conditional offer of employment to Karina Tejada Haseltine with a six (6) month probationary period for a full-time position as Section 8 Housing Coordinator at an annual salary of \$63,700.00 with a start date TBD. Employment is also conditioned upon receipt of a passed SHA paid physical examination including drug test (not marijuana) and a favorable Criminal Offense Record Information (CORI) check.

() seconds the motion and the **roll call** vote was as follows:

Ayes

Nays

Wage Match Guidelines - Certification

The Executive Director will present the Wage Match Acknowledgement Regarding Confidentiality of Information and DOR Disclosure and Security Training for Safe Guarding Information as per Public Housing Notice 2019-16.

() moves to approve and acknowledge that all authorized employees have read and thoroughly understand the contents of Public Housing Notice 2019-16 and that all

authorized employees at the Salem Housing Authority have read and signed the attached “Acknowledgement Regarding Confidentiality of the Department of Revenue’s Information and DOR Disclosure and Security Training for Safeguarding Information and that all authorized employees have signed the acknowledgments and are on file at the SHA and authorize Cathy Sheehan, Executive Director and Aaron Paternoster, Chair to execute a form named “Executive Director/Board Approval” to be sent to EOHLC. () seconds the motion and the **roll call** vote is as follows:

Ayes

Nays

Amendment #21 to the Contract for Financial Assistance (CFA) 5001 for Project 258150 Electrical Upgrades in the amount of \$125,000.00.

() moves to approve Amendment #21 to the Contract for Financial Assistance (CFA) 5001 for Project 258150 Electrical Upgrades as in the amount of \$125,000.00. This Amendment Funds the current CFA and the revised CFA is now \$23,157,217.74 and extends the contract dates of service from June 30, 2028 to June 30, 2035. () seconds the motion and the roll call vote is as follows:

Ayes

Nays

Certificate of Substantial Completion for EOHLC Project 258187 ARPA FF Siding and Window Replacement at Farrell Court 705-3

Cathy Sheehan will present Certificate of the Substantial Completion for EOHLC Project 258187 ARPA FF Siding and Window Replacement at Farrell Court 705-3.

() moves to accept the Certificate of Substantial Completion for EOHLC project 258187 ARPA FF Siding and Window Replacement at Farrell Court 705-3 effective as of noon on August 19, 2025. () seconds the motion and the roll call vote is as follows:

Ayes

Nays

Section 8 Management Assessment Plan (SEMAP)

The Executive Director will explain the Section 8 Management Assessment Plan (SEMAP) to the Board.

() moves to approve the Section 8 Management Assessment Plan (SEMAP) as submitted and to authorize Cathy Sheehan to submit said report to the Department of Housing and Urban Development (HUD). () seconds the motion and the **roll call** vote is as follows:

Ayes

Nays

Annual Holiday Employee Luncheon

Cathy Sheehan will ask the Board of Directors for approval to hold the Annual Holiday Employee Luncheon on (date T/B/D) from 12:00 noon to 3:00 p.m. for the Salem and Marblehead Housing Authority Employees

() moves to authorize Cathy Sheehan, Executive Director to hold the Annual Holiday Employee Luncheon on _____ (TBD) _____, 2025 from 12:00 noon to 3:00 p.m. at the cost of approximately Two Thousand Dollars (\$2000.00). () seconds the motion and the **roll call** vote is as follows:

Ayes

Nays

XII. Other Business/Late Communications

XIII. Adjournment

() moves that the Board adjourn the Regular Meeting of November 12, 2025 at () p.m. () seconds the motion and the **roll call** vote is as follows:

Ayes

Nays



Cathy Hoog, Executive Director

Main Office and Public Housing Department
27 Charter Street, Salem, MA 01970

Section 8 Department & Procurement/Modernization
136 Canal Street, Suite 2, Salem, MA 01970

Telephone: 978-744-4431 Fax: 978-744-9614
Website: www.salemha.org

**MINUTES OF THE
REGULAR BOARD OF DIRECTORS MEETING
WEDNESDAY, OCTOBER 8, 2025
6:00 p.m.**

This meeting was held via Zoom Webinar only.

I. Called Meeting to Order at 6:02 p.m.

II. Roll Call

Present

Romell Kidd
Doneeca Thurston-Chavez
Emily Ullman
Veronica Miranda

Absent

Aaron Paternoster

Also Present: Cathy Hoog, Executive Director, Gary Dean, Director of Maintenance, Debra Tucker, Assistant Executive Director, Anne Cameron, Executive Assistant, Jacqueline Guzman, Director of Leased Housing, Maureen Thomas, Director of Public Housing, Massiel Garcia, Finance Director and Joshua Bocko, Assistant Director of Public Housing

III. Minutes of Previous Meeting(s)

Veronica Miranda moved to approve the Minutes of the Regular Board of Directors Meeting on September 10, 2025. Doneeca Thurston-Chavez seconded the motion and the roll call vote was as follows:

Ayes

Romell Kidd
Doneeca Thurston-Chavez
Emily Ullman
Veronica Miranda

Nays

IV. Tenant/Public Engagement



Gene Collins – Pioneer Terrace, Salem - provided an update on the Statewide Tenant Association for Public Housing, noting a successful workshop with the undersecretary present and speaking about modernization programs and the establishment of attorney funding for eviction cases.

V. Report of the Executive Director

- Report of the Executive Director – October 2025

VI. Communications

- Updated Waitlist
- SHA Department Reports (Move In, Move Out, State and Federal, Modernization Report, Voucher Report, Family Self-Sufficient Report, Resident Service Coordinator Reports, CHAMP Report and Completed Work Orders for Month of September 2025)
- Salem State University Flyer – Collaboration with SSU Senior Nursing Students

VII. Reports of the Committees

VIII. Recommendations of the Chair

There were no recommendations of the Chair.

IX. Report of the Treasurer

Bills

Cathy presented the bills to the Board of Directors for the period September 1, 2025 through September 30, 2025.

Veronica Miranda moved to acknowledge receipt of the bills for the period September 1, 2025 through September 30, 2025 as presented. Doneeca Thurston-Chavez seconded the motion and the **roll call** vote was as follows:

Ayes

Romell Kidd
Doneeca Thurston-Chavez
Emily Ullman
Veronica Miranda

Nays

Balance Sheet and Statements of Revenues and Expenses

Cathy Hoog presented the Balance Sheet and Statements of Revenues and Expenses to the Board of Directors for eleven (11) months ending August 31, 2025 and request approval.

Doneeca Thurston-Chavez moved to accept the Balance Sheet and Statements of Revenues and Expenses prepared by Paul Pavia of Fenton, Ewald & Associates, P.C. for eleven (11) months ending August 31, 2025. Emily Ullman seconded the motion and the **roll call** vote was as follows:

Ayes

Romell Kidd
Doneeca Thurston-Chavez
Emily Ullman
Veronica Miranda

Nays

Section 8 - Repayments Collected 10/01/2024 -9/30/2025

Cathy Hoog presented the Section 8 Repayments Collected 10/01/2024 – 9/30/2025.

The total amount collected is \$154,303.00 SHA retains fifty (50%) percent of \$154,303.00 which equals \$77,151.50.

Public Housing Retro Rents Collected 10/01/2024 – 9/30/2025

Cathy Hoog presented the Public Housing Retro Rents Collected 10/01/2024 – 9/30/2025.

The total amount collected for State is \$111,099.75/. SHA retains Sixty-Seven (67%) percent of \$111,099,75 which equals \$74,436.83. The total amount collected for Federal is \$5,618.25 and the SHA retains 100%.

X. Unfinished Business

- Salem Housing Authority “Draft” Internal Controls Policy

XI. New Business

Revision – Sexual Harassment Policy – Officer Assignment

Cathy Hoog presented the Sexual Harassment Policy for revision whereby it is

necessary for a new Sexual Harassment Officer to be appointed by the Board of Directors as Carly McClain has resigned as a Board Member.

Romell Kidd moved to appoint Emily Ullman as the new Sexual Harassment Officer. Said Sexual Harassment Policy shall be revised to reflect this Board Vote. Veronica Miranda seconded the motion and the roll call vote was as follows:

Ayes

Romell Kidd
Doneeca Thurston-Chavez
Emily Ullman
Veronica Miranda

Nays

Annual Submissions

Cathy Hoog informed the Board that once a year the Salem Housing Authority is required to have each staff member, each Board Member and other individuals considered to be state employees sign the Conflict of Interest/State Ethics Commission Summary. Each employee and Board Member will be informed via email by the State Ethics Commission to complete the same on-line.

In addition, every two (2) years the above-mentioned individuals are required to complete a Conflict-of-Interest online training program. This online training last occurred in October of 2023 and will need to be completed this October. Each employee and Board Member will be notified by email by the State Ethics Commission to complete the same on-line.

The Director will also request that the Board of Directors and each staff member sign the Sexual Harassment Policy document as part of the Annual October Submissions: This document will be emailed to everyone prior to the end of October 2025.

Certificate of Final Completion as of October 8, 2025 and Final Payment in the amount of \$20,622.89 from Cassidy Landscaping LLC for EOHLIC project #258164 Creative Placemaking Grant, Site Improvements, and Art Project at Pioneer Terrace

Cathy Hoog presented to the Board of Directors Certificate of Final Completion as of October 8, 2025 and final payment in the amount of \$20,622.89 from Cassidy Landscaping LLC for EOHLIC project #258164.

Veronica Miranda moved to approve the Certificate of Final Completion as of October 8, 2025 and final payment in the amount of \$20,622.89 from Cassidy Landscaping LLC for EOHLC project #258164 Creative Placemaking Grant, Site Improvements, and Art

Project at Pioneer Terrace. Doneeca Thurston-Chavez seconded the motion and the roll call vote was as follows:

Ayes

Nays

Romell Kidd
Doneeca Thurston-Chavez
Emily Ullman
Veronica Miranda

Collection of Losses – Write Offs Through 09/30/25 per Public Housing Notice 2017-17

Cathy Hoog presented the Collection of Losses – Write Offs Through 9/30/25 per Public Housing Notice 2017-17.

Romell Kidd moved to approve write offs through September 30, 2025 for State Development 667 in the amount of \$4,129.91 pursuant to Public Housing Notice 2017-17. Doneeca Thurston-Chavez seconded the motion and the **roll call** vote was as follows:

Ayes

Nays

Romell Kidd
Doneeca Thurston-Chavez
Emily Ullman
Veronica Miranda

XII. Other Business/Late Communications

Romell Kidd moved to approve Change Order #1 in the amount of \$16,244.42 with a time extension of 154 calendar days as submitted by the Contractor, Environmental Restorations, Inc., and approved by the Architect, Raymond T. Guerton, for EOHLC project #258189 Walk In Shower Project at 3 Developments. This change order represents additional costs due to unforeseen extensive plumbing issues and rotted framing found in the wet wall and for moving a wall heater at 27 Charter St., Unit 607. Veronica Miranda seconded the motion and the roll call was as follows:

Ayes

Nays

Romell Kidd
Doneeca Thurston-Chavez
Emily Ullman
Veronica Miranda

XIII. Adjournment

Veronica Miranda moved to adjourn the regular Board of Directors Meeting on Wednesday, October 8, 2025 at 6:48 p.m. Romell Kidd seconded the motion and the roll call vote was as follows:

Ayes

Romell Kidd
Doneeca Thurston-Chavez
Emily Ullman
Veronica Miranda

Nays

Summary Page for Articles V through XII of the
Minutes of the Board of Directors Meeting on October 8, 2025

The meeting began with Emily presiding over her first official meeting as acting chair as Aaron Paternoster was absent. At roll call all members were present except for Aaron Paternoster and Romell Kidd was tardy.

The meeting then moved to a report from Cathy Hoog, Executive Director. Cathy reviewed her report with the Board in detail. See Attached Executive Director Report for October 2025.

Some of the items Cathy hi-lighted were as follows:

Cathy provided an update on the public housing repositioning, noting that the Housing Assistant Payment Award has been received, effective February 2026, with all necessary steps to be completed by the end of January 2026. She highlighted the busy maintenance department with 258 work orders completed and 12 ongoing modernization projects, including a federal roof project. Cathy also discussed the Section 8 program, FSS program progress, and upcoming events, including a graduation ceremony and holiday plans.

Veronica emphasized the importance of dignity in residents' living spaces, referencing planned kitchen and bath modernization projects at Bertram, while Cathy noted these projects had been delayed but were now moving forward.

Unfinished Business/Internal Controls Policy

The board discussed the policy subcommittee's meeting, where they reviewed the role of the body and the Internal Controls draft policy. Veronica reported that the subcommittee plans to obtain feedback from a CPA at the end of the month before making any recommendations to the full board. Emily suggested removing the draft Internal Controls Policy from the ongoing agenda, which the board agreed to do.

Report of Treasurer/Bills/Financial Statements Prepared by Paul Pavia, CPA, Fenton, Ewald

The treasurer, Romell Kidd, reported having nothing to report, and the board approved the bills for the period September 1, 2025 through September 30, 2025 and financial statements for the period ending August 31st, 2025.

Section 8 and State Public Housing Repayment Collections Update

The meeting focused on updates regarding repayment collections for Section 8 and public housing programs. Cathy reported that \$154,303 in Section 8 repayments were collected, with the Housing Authority retaining 50% as per federal guidelines. She also highlighted that the state

public housing department collected \$116,718 in retroactive rents, with the authority retaining 67% of this amount. The discussion clarified the financial arrangements with both federal and state governments. Romell Kidd inquired about the nature of repayment agreements and the distribution of collected funds.

New Business

Emily was appointed as the new sexual harassment policy officer, replacing the vacant position since Carly's departure. Romell seconded Emily's appointment and moved to update the policy to reflect the board's decision.

Cathy Hoog discussed with the Board the annual requirements for conflict of interest submissions and online training, with Anne Cameron managing these reminders.

The board approved the Certificate of Final Completion for the EOHLIC Project 258164 Creative Placemaking Grant, which included site improvements and an art project at Pioneer Terrace, with a final payment of \$20,622.89 from Cassidy Landscaping LLC.

Cathy expressed gratitude to Debbie Tucker, and Gary Dean, along with the maintenance team, for their hard work on the project, which she noted was beneficial to the residents.

The Board also approved write-offs through September 30th, 2025 for State Development 667 in the amount of \$4,129.91, as per Public Housing Notice 2017-17.

Other Business/Late Communications

The board discussed a change order proposal for plumbing issues at Charter Street, which was approved by a vote.

Cathy Hoog provided an update on the Federal Government shutdown's impact, noting that funding is expected through November.

Veronica Miranda announced her reappointment as tenant representative for five more years. Emily congratulated Veronica on her reappointment.

Cathy Hoog shared feedback from a meeting with strategic planning consultants, indicating they will focus on group collaboration and future goal-setting.

Doneca Thurston-Chavez announced her resignation from the board due to her family's relocation to Lynn. Emily, Romell and Cathy thanked Doneca for her service on the Board and wished her well.

ED Summary November 2025

The following summary is provided as a guide for the SHA Board of Commissioners to review monthly SHA Department outcomes. Additional Department reports provide more detailed statistical data related to SHA finance, modernization, public housing vacancy, section 8 vouchers, maintenance work orders, resident services, Family Self Sufficiency (FSS) programs, Housing Now, champ wait list data and property management. The detailed reports are attached in the monthly Board packet with this summary.

Administration/Personnel

- Closing for the Public Housing Program to take place by end or before January 2026. HUD Housing Assistance payment award issued to begin in February of 2026.

Financial

- Fiscal Year End Closing Financial reports included in packets.
- Budget Guidelines for 2025-2026 have been issued. Prep for new budget begins in December.

Property/Modernization

- 500 Work orders completed this month. See work order reports and move in/move out reports for detailed information related to work order data and public housing vacancies/move ins.
- 12 State modernization projects are currently in design or under construction. See modernization report for more detailed updates on each project. 1 Federal modernization project is being planned for construction.
- 100 CHAMP applications pulled and being reviewed for placement. See CHAMP report for more detailed information on champ waitlist pulls and offers for public housing units.
- 3 New Admissions in Public Housing

Section 8 Program

- 1160 units under lease, See Voucher report for additional specifics related to Section 8 vouchers issued.
- The Section 8 program cannot issue any new vouchers per HUD orders.

- FSS Program- 30 **voucher holders** (19 is the target goal for HUD) have been enrolled into the program and signed contracts, **\$115,022 in earned escrow amongst the participants**. 2026 FSS renewal grant application was submitted. **Quarterly FSS report provided this month on the FSS program and participant statistics.**

Residents and Community

- **17 new Referrals** were made to the Service Coordinators this month for resident assistance. **75 residents served** for ongoing case management
- **Housing Now Program**- 8 Families have been leased up and receiving comprehensive case management services with Family Success Plans in place. Six families have remained successfully leased up for 8 months and graduating from the program November 2025. Two families have remained successfully leased up for 7 months. An extension for 2 housing Now families was approved for an additional 2 months.
- **Future Forward State Self-Sufficiency Program**-Two orientations took place for families in Salem and Marblehead. Four families are enrolled in the program and have signed contracts. Enrollment will be ongoing.
- Ongoing activities for residents-
- Holiday event planned for December 10th at the Salem State University Bookstore area for residents of Rainbow Terrace and Housing Now participants.
- November 18th services event at Charter Street with COA, City of Salem Constituent Services Gather Health and SPD therapy dog.
- Wellness Wednesdays
- Mobile Salem Food Pantry
- RSC's continue attendance at local REACT meetings with Salem PD and area providers.
- Planning for fire safety talks in motion with Salem FD
- **See monthly Service Coordinator reports for specific data related to engagement/service coordination categories for residents.**

Funding Awards/Grant Applications Summary for 2019-2024

Fiscal Year 2019-2020

Awards total: \$1,161,681.29 (RSC grant (annual), health/safety initiative, PEHO, Gateway Cities, CPA, Creative Placemaking)

Fiscal Year 2020-2021

Awards total: \$4,407,082.00 (Section 8 HAP, HILAP, Action Inc. Sustainability, CDBG)

Fiscal Year 2021-2022

Awards total: \$2,400,946.00 (CPA, DHCD Target Award, Solar Farm Savings(annual)/Sign on Bonus, New Section 8 Vouchers and Admin Fee (annual))

Fiscal Year 2022-2023

Awards total: \$24,041,404.30 plus Leefort Profit Sharing (CDBG wifi, RSC funding, FSS funding, ARPA development for Leefort, HOME funding for Leefort, HILAP for Leefort, CPA roof, \$14,500,000 in soft bond and five years of tax credits for Leefort, Bertram Terrace Compliance funds)**Leefort Profit Sharing: Approx \$2.8 million**

Fiscal Year 2023-2024

SHA has received **\$88,420** in additional shortfall funding to assist with the needs to cover the section 8 program.

An application was submitted to Mass Housing Partnership for feasibility costs related to an RFP for the vacant land at Farrell Court. **\$35,000** was awarded to SHA this past month to explore the feasibility of developing the land next to Farrell Court. Testing will soon begin on the ledge to further determine the scope of possibilities for the land.

An application was made to Salem CPA committee for **\$160,000** for upgrades and repairs to the Barton Square elevator. SHA was awarded \$160,000 for the elevator upgrades at Barton Square.

An application was made to Salem CDBG program for **\$41,400** to offer residents a series of yoga, meditation, art therapies and pet therapy. Stay tuned.

RSC award made to SHA for \$70,000.00 to continue RSC service coordination for residents of SHA and BHA.

EOHLC Housing Now Grant application submitted last month for Case Management services along with family housing unit designations to assist families dealing with homelessness. SHA awarded \$96,000 per EOHLC fiscal year, initial award is \$80,000 due to months into fiscal year.

Fiscal Year 2025 Family Self Sufficiency grant application submitted to HUD November 2024

SHA partnering with City and local St. Peter's San Pedro Church next to Morency building on geothermal networking grant opportunities for further studying the feasibility for municipal downtown buildings to network on Geothermal.

HUD Shortfall funding application was submitted for 2024 to cover landlord rent increases. SHA was awarded \$658,000.00

Fiscal Year 2024-2025

SHA submitted the 2025 Comprehensive Modernization grant program to EOHLC May205. The project scope will include replacement windows, building envelope repairs and roof repairs for

the Charter Street building. The grant was submitted in May 2025 totaling over \$2million for work at Charter Street. Stay tuned.

A Community Preservation Funding application was submitted to the City Community Preservation Committee for funding the roof replacement at the Zisson development. The application was approved and funded \$378,00.00

A CDBG grant application was submitted to the City for programming for technical assistance to seniors for computer use and basic applications along with training materials/equipment. Stay tuned.

The HUD FSS program grant application was awarded for an additional two years of funding, initial year award is \$110,000.

The State Self-Sufficiency Grant program was submitted for funding in March in partnership with the Marblehead Housing Authority. The grant was awarded to SHA/MHA for \$100,000 annually.

SHA applied for the State Residential Retrofit Program for Public Housing Units in an effort to increase access to reliable internet services for residents. The grant addresses inadequate wiring and infrastructure. The grants are intended to increase connectivity, reduce cost burdens and improve digital access for low-income residents. SHA was awarded services for 665 units spread over 21 properties as part of Aervivo Inc. Connectivity Platform.

Development/Redevelopment Updates

The Leefort Terrace construction completion is anticipated for May 2026.

Planning for wait list opening is in progress and anticipated marketing to begin in January/February of 2026.

The voluntary pre-proposal site meeting for 17-27 First Street took place on Wednesday, September 3, 2025. Twenty-nine (29) designers and developers were in attendance for review of the RFP and any additional questions. A site tour followed the pre-proposal meeting and attendees walked the site. Interested parties have requested the full RFP package.

The RFP due date for the First Street land was November 3, 2025. Three proposals were received. The evaluation committee will be reviewing the proposals over the course of the next month. The evaluation committee consists of Director of Maintenance Operations, Modernization and Development Coordinator, Executive Director, City of Salem Deputy Director of Planning and Community Development and SHA Development Consultant. Proposals were submitted by Beacon Communities, Harborlight Homes and Pennrose.

An RFP for a design consultant has been issued responses were due October 16, 2025. One consultant submitted a proposal and is presented to the Board this month.

Government Shutdown Enters Week 3

The federal government shutdown has reached its third week as they still have not reached a funding agreement. Both sides remain dug in on their positions and seem unwilling to compromise. As the shutdown continues, thousands of federal workers remain furloughed, and only those performing certain crucial functions remain working. For a full review of what functions are being performed at HUD, please review HUD's contingency plan [here](#).

Additionally, the Trump Administration has announced Reduction in Forces (RIFs) across all agencies, and HUD has seen 442 staff receive RIF notices. For a more in-depth breakdown: 103 of these employees are from the Office of Public and Indian Housing, 36 are from Housing Counseling, 50 from Housing Operating, 30 from Community Planning and Development, and 114 from Fair Housing and Equal Opportunity. While these RIFs are currently the subject of a court proceeding, they add to a growing number of HUD staff who have left government service.

Regarding funding, updates remain roughly the same. For the Housing Choice Voucher Program, HUD had originally stated that HAP and admin payments were obligated for October and half of November. HUD has updated this timeline and now says that payments will be obligated for all of November and December. These will be available at the beginning of each month. Shortfall payments are being made pursuant to HUD's contingency plan.

For public housing operating fund payments, HUD has said that payments are obligated for October and November.

continued on page 3



2025 Annual Conference: Three Days of Learning, Networking, & Celebration

MassNAHRO's 2025 Annual Conference & Exhibition, held September 7-10 at the Sea Crest Hotel in Falmouth, was a tremendous success, drawing over 300 members from 160 housing authorities across the Commonwealth for three days of learning, connection, and inspiration.

The conference kicked off Sunday with the opening of the Exhibit Hall, featuring

55 vendors showcasing the latest in housing products and services. That evening's dinner program featured guest speaker State Representative Kip Diggs, who set the tone for

the event with his engaging remarks on community and leadership. As the night continued, a crowd of attendees rounded out the evening on the outside deck with s'mores around the fire, enjoying conversation and camaraderie by the ocean.

Monday's Opening Plenary featured State Senator Dylan Fernandes, who delivered an eloquent and heartfelt speech about the housing crisis and the crucial



(l-r) State Senator Dylan Fernandes, MassNAHRO Executive Director Donna Brown-Rego, MassNAHRO President Peter Proulx.

role of advocacy in advancing affordable housing solutions. At Monday's luncheon, attendees welcomed NAHRO President-Elect Sean Gilbert and CEO Mark Thiele, as well as honored Board Member of the Year Greg Spier of Foxboro and Member of the Year Tom Thibeault,

Executive Director of the Brockton Housing Authority. The conference agenda of more than 20 sessions covered a wide range of hot topics, with many participants wishing they could be in two sessions at once.

The Monday evening reception in the exhibit hall was buzzing with excitement - featuring dozens of raffle prizes generously donated by exhibitors and a record-breaking silent auction to benefit the Past Presidents Memorial Scholarship Fund. After a full day of learning, members put on their dancing shoes for the Glow Party with DJ Cubey, lighting up the night with music and fun.

On Tuesday, the conference continued with another round of excellent sessions, including a Washington Update and discussions focused on Section 8 programs. The Tuesday luncheon celebrated the announcement of the 2025 scholarship recipients and featured Piper Hunt, winner of the Thomas J. Connelly, Jr. Scholarship, who delivered a tremendous and inspiring speech. The afternoon concluded with peer-to-peer roundtable discussions, followed by a beautiful sunset reception in the courtyard, offering a perfect close to an energizing and memorable event for all in attendance. *(More photos on page 3.)*



(l-r) Past President Steve Merritt, Past President Connie Desbiens, retired MassNAHRO Executive Director Tom Connelly, Thomas J. Connelly, Jr. Scholarship recipient Piper Hunt, Past President Lisa Audette, MassNAHRO President Peter Proulx.

Massachusetts NAHRO
2025-2026 Board of Directors

PRESIDENT

Peter Proulx
 Chief Operating Officer
 Worcester Housing Authority

VICE-PRESIDENT - Large HAS

Colleen Doherty
 Executive Director
 Taunton Housing Authority

VICE-PRESIDENT - Medium HAS

Caileen Foley
 Executive Director
 Lexington Housing Authority

VICE-PRESIDENT - Small HAS

Mark Roy
 Executive Director
 Canton Housing Authority

VICE-PRESIDENT - Commissioners

Krisanne Sheedy
 Board Member
 Easton Housing Authority

VICE-PRESIDENT - Aff. Hsg. Dev.

Kirk Fulton
 Senior Dir. of Operations & Integration
 Chelmsford Housing Authority

TREASURER

Jennifer Polito
 Executive Director
 Concord Housing Authority

IMMEDIATE PAST PRESIDENT

Michael Lara
 Executive Director
 Newton Housing Authority

DIRECTOR EMERITUS

Thomas J. Connelly, Jr.

DIRECTORS - Terms expiring 2026

Alex Corrales, Chief Executive Officer, Worcester Housing Authority
 Kathryn Gallant, Executive Director, Reading Housing Authority
 Skye Kessler, Board Member, Dedham Housing Authority
 Krishonna Murray, Executive Director, Gardner Housing Authority
 Pamela Rogers, Executive Director, Amherst Housing Authority
 Tom Thibeault, Executive Director, Brockton Housing Authority

DIRECTORS - Terms expiring 2027

Candace Avery, Executive Director, Millis Housing Authority
 Sean Barnicle, Executive Director, Norwood Housing Authority
 Benjamin Gold, Executive Director, Leominster Housing Authority
 Gina Govoni, Executive Director, Franklin County HRA
 Matthew Mainville, Executive Director, Holyoke Housing Authority
 Randy Waters, Executive Director, Natick Housing Authority

Professional Staff**EXECUTIVE DIRECTOR**

Donna Brown-Rego, Esq.

DIRECTOR OF PROFESSIONAL DEVELOPMENT & MEMBER SERVICES

Jessica Coughlin

DIRECTOR OF POLICY & PROGRAM DEVELOPMENT

Cylas Martell-Crawford, Esq.

MEMBER SERVICES COORDINATOR

Elaine Egersheim

President's Corner

Thank you to everyone who joined us in Falmouth for this year's MassNAHRO Annual Conference & Exhibition. What a fantastic event! From the exhibit hall buzz to the beachside s'mores, it was energizing to see so many familiar faces and

new connections all in one place.

Now, before I get too serious...

A five-dollar bill walks into a bar, and the bartender says, "Hey, this is a singles bar!"

You knew a joke was coming, didn't you?

I'm already looking forward to our next big gathering - the 2nd Annual MassNAHRO Awards Night on October 30. Last year's celebration was a wonderful evening of recognition and camaraderie, and this year's promises to be even more spectacular. I hope to see all of you there!

Meanwhile, across the Commonwealth and the country, housing authorities are still waiting for critical updates from HUD regarding budgets and regulations. The uncertainty is real, but so is our resilience. MassNAHRO will continue to share the latest developments through our Weekly Digest and federal roundtables, and we'll keep pushing for clarity on key issues such as shortfall status.

Now more than ever, communication and collaboration are essential. Please continue sharing your challenges, insights, and success stories with us - your feedback not only informs our work but strengthens our collective advocacy.

In the coming weeks, MassNAHRO will distribute sample letters that members can send to their elected officials - both here in Massachusetts and to members of the THUD Committees in Washington - to ensure our unified message is heard loud and clear.

We've weathered difficult times before, and while the road ahead may bring new challenges, I am confident that together, we can turn them into opportunities - opportunities to innovate, advocate, and continue delivering safe, affordable housing for the residents of Massachusetts.

Thank you for all you do - every single day - to make a difference.

Peter Proulx
 President
 Massachusetts NAHRO, Inc.

Chief Operating Officer
 Worcester Housing Authority

2025 Member of the Year - Tom Thibeault



2025 Member of the Year, Tom Thibeault (center), pictured with members of Brockton H.A. board & staff.

The "Member of the Year" award is for "extraordinary accomplishments worthy of recognition by all members of the Association." This year, MassNAHRO is recognizing Tom Thibeault, Executive Director of the Brockton Housing Authority, for his commitment to MassNAHRO and the housing field.

Tom has devoted 35 years of service to the Brockton Housing Authority, where he began his career in public housing as Assistant Supervisor in Tenant Selection and rose to become a widely respected leader in the field. His agency is consistently recognized as one of the best performing in the Commonwealth, a reflection of both his knowledge and his steady leadership.

In June 2023, he joined the MassNAHRO Board of Directors, and he has since been an active and engaged voice for our members. He serves on the Housing Committee, the Affordable Housing Development Committee, and the Federal Housing Task Force, helping to shape policies and initiatives that benefit housing authorities across the state.

Beyond MassNAHRO, he also gives generously of his time and expertise by serving on several local boards, including the Easton Housing Authority, MassHire Brockton, and New Beginnings for Families, Inc.

He is also known for cultivating strong, productive relationships with both local and state elected officials, ensuring that the voices of housing authorities and residents are heard where it matters most.

On behalf of its members, MassNAHRO is honored to recognize Tom as a knowledgeable leader, dedicated advocate, and true partner in its shared mission.

SHUTDOWN *continued from page 1*
Capital funds that were already appropriated should be accessible to be drawn down as well.

More information can be found at National NAHRO's Shutdown Resource Page [here](#). The National Housing Law Project also has a [resource page](#) for residents living in federally-assisted housing.

As the government shutdown situation develops, please watch for upcoming calls to action and information requests from MassNAHRO. Should you have any additional questions, please do not hesitate to reach out to Cylas Martell-Crawford at cmartellcrawford@massnahro.org.

Emergency and Evacuation Planning for Every Housing Authority

webinar

December 16 9:00 AM-12:00 PM

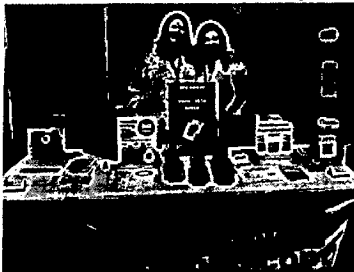
Fires, floods, power outages, or a building-wide rehab - emergencies come in many forms, and housing authorities must be ready to act fast to protect residents and staff. This essential session will walk you through how to create a clear, effective emergency and evacuation plan tailored to your properties, your people, and your capacity. Whether you're in a high-rise, a scattered site, or a senior building, you'll learn the steps to prepare your team, communicate with residents, and coordinate with first responders. Don't wait for the crisis; plan now so you're ready when it counts.

Presenters:

Richard Menard, III, Chief Services Officer, Worcester H.A.
Chris Partridge, Director of Maintenance & Modernization, Arlington H.A.

Go to [MassNAHRO Professional Development](#) to register.

CONFERENCE *continued from page 1*



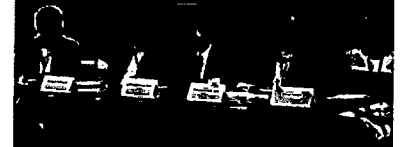
Conference Sponsor AffordableHousing.com.



Conference Sponsor and first-time exhibitor, Matcha Electric.



Annual Conference exhibitors and panelists, Turk & Milone, LLP.



Panel discusses Board & E.D. relationships.



Driscoll & Driscoll facilitate Mock Board Meeting session.



S'mores on the outside deck.



Glow Party!



South Shore Bank delivers gift basket to raffle winner in exhibit hall.

Board Member Do's and Don'ts

This list from the HUD Inspector General is not inclusive. However, board members should use it to assist in making decisions and developing sound management policies regarding housing authority operations.

DO's

- Do pass resolutions and policies only after thorough discussion and understanding of the purpose, usage, intent and implications.
- Do monitor policies and procedures from time to time to ensure that the result is what was intended.
- Do establish monitoring controls to detect and prevent conflicts of interest, fraud and abuse.
- Do ensure that an audit is conducted annually and that the report is reviewed by the entire Board. If the Board has an area of concern, the Board should request that the Executive Director check into that area or ask the auditors to expand their review to include that area.
- Do conduct meetings at least quarterly with Resident Council leaders to solicit comments and input. Time can be allowed at meetings for just such comments and input. The HUD IG encourages Board Members to consider training sessions for Resident Council leaders on the constructive role they can perform.
- Do ensure that the Authority operates legally and with integrity. Establish high ethical standards for the LHA staff and act as positive role models.
- Do learn what the common risks are and be alert for problems such as embezzlement, improper procurement, and other irregularities.

DON'Ts

- Don't sign blank checks, or checks that are not backed up with bills, invoices or vouchers.
- Don't have any bank accounts which are controlled by one signature.
- Don't, if at all possible, let persons who are authorized to sign checks reconcile bank statements.
- Don't use Authority supplies, equipment, machinery, construction or rehabilitation supplies or staff for personal use.
- Don't use Authority tax exempt status, or the LHA credit cards for personal use.
- Don't use the Authority's contractors for personal purposes while they are engaged in work for your housing authority (and MassNAHRO suggests not afterward either as the Conflict of Interest law in Massachusetts is so stringent that even the "appearance" of impropriety is contrary to the law and subject to very public penalties).
- Don't accept gifts, dinners, or other gratuities from contractors or those bidding for Authority work (and

MassNAHRO suggests from anyone else either, for the same reasons stated above).

- Don't become involved in any business relationships between yourself and the Authority where you or your company are dealing with Authority matters. (We suggest this includes serving on the Board of Directors of a bank which handles Authority accounts and reserves.)
- Don't approve contracts with provisions that are in violation of the Contract for Financial Assistance (CFA) with the state, or the Annual Contributions Contract (ACC) with HUD, or violate state or federal statutes.

State Law Exempts Board Members from Personal Liability

Questions are often posed relative to the personal liability of LHA board members, including state appointees and resident members, when taking official actions as a publicly elected or appointed member of a Local Housing Authority Board.

In response to concerns of personal liability from citizens of the Commonwealth, and to encourage more people to join public service, the Massachusetts Legislature enacted Section 13 of Chapter 121B of the Massachusetts General Laws. The law reads as follows:

Section 13. Contract and Tort Liability; member's personal liability.

"An operating agency (LHA) shall be liable in contract or in tort in the same manner as a private corporation. The members, employees, officers and agents of an operating agency (LHA) shall not be liable as such on its contracts or for torts not committed or directly authorized by them, nor shall said members be liable for any negligent or wrongful act or omission for which the operating agency would be liable under applicable rules of law, in which event any action either civil or criminal against the operating agency shall be the exclusive remedy for any injured party."

As you can see, under this law, board members are offered protections for actions not directly committed or authorized by them. There will be no judgments against an individual board member acting in their official capacity, within the scope of their public duties. This law has been tested in the courts, with one case, a wrongful action suit filed against the five board members of an LHA thrown out due to Section 13.

All told, personal liability concerns should not deter residents or any citizen from running for or seeking appointment to their LHA Board. Nevertheless, HUD encourages PHAs to purchase public official's liability coverage. MassNAHRO also believes securing Public Official Liability protection is a sound business practice. Additionally, MassNAHRO offers a number of opportunities for board members to receive further trainings to ensure that all actions taken in their personal capacity are authorized. Additional information can also be found in MassNAHRO's *Handbook for Board Members of Massachusetts Public Housing Authorities*. Boards can also consult counsel for more guidance.

Greg Spier of Foxboro Named Board Member of the Year

The Board Member of the Year award honors a member who has demonstrated excellence in advocating for and developing the financial, political and community support necessary to ensure the continuation of housing or community development programs. This year's recipient is Greg Spier, Chairman of the Foxboro Housing Authority.

Greg has been the driving force behind the creation of Walnut Knoll, a transformative 200-unit affordable senior and disabled housing development in Foxborough - the first such housing built in the community in over 50 years and one of the largest projects of its kind in Massachusetts. Thanks to Greg's persistence and vision, Phases 1 and 2 are nearing completion, with the first residents expected to move in this September.

His leadership extended well beyond the housing authority, as Greg worked closely with local, state, and federal officials, securing the land, critical infrastructure improvements such as traffic signals and sewer connections, and the State and Federal funding that made the project possible. Even as phases 1 and 2 wrap up, Greg has personally traveled to Washington, D.C., at his own expense, to lobby HUD officials and advocate for federal funding for Phase 3 - an effort that is now expected to succeed.

In addition to his direct advocacy, Greg has excelled at building community support and awareness for the project. Through interviews, local media outreach, and arranging a special cable access program, he helped prospective tenants understand the application process while also highlighting Walnut Knoll's value to the broader community.

Beyond his housing work, Greg has long been a pillar of community leadership, serving on the Board of Directors of the Hockomock YMCA (including as past Chair) and as a founding member of the Tri-Town Chamber of Commerce.

Greg Spier exemplifies what it means to be a committed, visionary board member, and MassNAHRO is proud to recognize him as the 2025 Board Member of the Year.



2025 Board Member of the Year, Greg Spier (center), with Foxboro Executive Director, Kevin Fusco (left), and MassNAHRO President Peter Proulx.

Handbook for Board Members For Sale

Updated in late 2024, the cost of the book is \$24.99 each or five copies for \$99, including shipping. Order your copy today at www.massnahro.org or contact MassNAHRO. Visit the "[Board Member Resources](#)" page for helpful links and downloadable documents.

The Board Member's Commandments

1. Familiarize yourself with the programs and developments the Authority owns and operates. Be able to discuss them intelligently. Know how they work, how they are funded and what needs they are intended to address in the community.
2. Be aware of the housing needs and community issues in your city or town, and provide input whenever possible into the community planning strategies for those issues.
3. Get to know all your legislators well. Involve them in your efforts to provide a decent living environment, resident services and timely repairs to your developments. Remember: the Legislature and the Congress appropriate all the funds and set the conditions and parameters of every housing program.
4. Communicate with your Executive Director. If you need information, ask questions but be aware of the privacy and confidentiality restrictions that must be observed.
5. Establish a strong working relationship with the Executive Director that is based upon mutual trust and respect. The Executive Director is an ex officio member of the Board by law. No one should have a hidden agenda.
6. Be independent. Stand up for what you believe is right. Do not go along just because others are loud or have differing opinions. Do your own thing.
7. Hire a qualified Executive Director who you believe can do the job, not a politically expedient applicant that has less to offer your Authority. This is the most important responsibility of a Board Member. The well-being of the Authority comes first.
8. Listen to those who regulate and audit your Authority. They have the information you need to know do your job as an overseer both efficiently and effectively. Understand your operating budget and review any audit findings.
9. Set policy and monitor its implementation. The Board Member should not get involved in the day-to-day operation of the authority as that compromises integrity.
10. To provide effective oversight, board members must engage in performance appraisals of their Executive Director.
11. An Authority is a public entity that is comprised of five public officials acting as one. Majority rules.
12. Do not use the Authority for your own political, social or financial advantage. There are sanctions. Keep your reputation as a dedicated public official untarnished. If a red flag pops up, always check with the State Ethics Commission.

Common Property Management Issues

Thursday, November 20
9:00 AM - 4:00 PM
Tewksbury Housing Authority

This full-day training builds on the popular Real-World Property Management Challenges conference session and offers property managers, housing authority staff, and affordable housing professionals a deeper exploration of the most common and complex issues faced in day-to-day operations.

Drawing from decades of direct leadership experience across thousands of units, the program goes beyond surface-level solutions to provide practical strategies, tested tools, and real case studies that participants can immediately apply in their own portfolios.

Through a dynamic mix of lecture, interactive discussion, Q&A, group problem-solving, and scenario-based exercises, participants will gain hands-on experience with best practices in areas such as:

- **smoking enforcement**
- **pest control**
- **water damage response**
- **deceased tenant protocols**
- **security and crime prevention**
- **hoarding**
- **fair housing compliance**
- **staff development**
- **responsible use of AI in housing operations**

The training emphasizes professionalism, empathy, and accountability, equipping attendees to strengthen communication systems, improve documentation, and navigate sensitive resident interactions with confidence. Participants will also leave with take-home resources, including sample policies, checklists, and practical guides, ensuring they are well-prepared to implement new strategies, enhance team leadership, and build long-term organizational success.

Presenter: Kevin Braga, Director of Operations, Cambridge Housing Authority

Registration: \$199 for Members
Members \$499 for Non-Members

Go to [MassNAHRO Professional Development](#) to register.



MassNAHRO Think Tanks are virtual roundtables focused on timely topics where members can learn, exchange ideas, discuss challenges, and share success stories with one another. Registration is free for MassNAHRO members, but pre-registration is required. All participants will be entered into a drawing for a \$25 gift card!

November Advancing Equitable Housing for Families Impacted by Incarceration November 14 2:00 PM - 4:00 PM

Join Justice 4 Housing (J4H) for an informative session on advancing equity in public housing for Families Impacted by Incarceration (FIP). This webinar will:

- Introduce the work J4H has done in partnership with local housing authorities across the Commonwealth;
- Highlight key successes and measurable outcomes;
- Demonstrate the broader benefits of this initiative; and
- Invite all housing authorities to consider adopting the policy recommendations outlined in J4H's Far From Home (FFH) report.

Participating housing authorities will share brief overviews of their collaboration with J4H, including outcomes achieved through Administrative Plan updates or participation in the SHARP Program.

December Intro to ChatGPT, CoPilot & AI Tools for Housing Authority Efficiency December 4 10:00 AM - 12:00 PM

Presented by: Edlin Ortiz, Chief Resident Programs Officer, Worcester H.A.

This session introduces you to ChatGPT, Microsoft CoPilot, and other Artificial Intelligence (AI) platforms that can help housing professionals write faster, work smarter, and reduce burnout. Whether you're at a large housing authority or a small two-person office, you'll see practical, real-life examples of how AI can support everyday tasks, from drafting letters and board reports to organizing inspections, simplifying HR, or planning events. No jargon, no judgment, just the tools you need to get started and take control of your workflow.

save the date...

2026 Spring Conference & Exhibition March 22-24



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Malden Housing Authority



CMS Associates, Inc.

STOUGHTON HOUSING AUTHORITY

TAUNTON HOUSING AUTHORITY

LEICESTER HOUSING AUTHORITY

NORTHBORO HOUSING AUTHORITY



No-Bid Products Available from Mass. Correctional Industries

Under the State Use Law, when buying from Massachusetts Correctional Industries (MassCor), Massachusetts housing authorities are EXEMPT from any obligation to go out to bid regardless of the size of the purchase. MassCor offers free delivery. Items include:

- signs
- outdoors furniture (park benches, picnic tables, bike racks)
- trash receptacles & recycle bins
- high visibility wear
- flags & flagpoles
- reupholstery of chairs & couches
- printing (letterhead, business cards, newsletters, envelopes, etc.)
- and more!

Now is a great time to order benches and picnic tables. Don't wait until spring! You can order now and schedule for spring delivery. You will not be billed until items are delivered in spring.

For orders, quotes, and product inquiries call or email Brenda Sjoquist at 508-850-6996 or Brenda.Sjoquist@Massmail.State.ma.us, or Steve Cristol at 774-235-5099 or Steven.Cristol@Massmail.State.ma.us. Check out [MassCor](http://MassCor.com) Industries online.

Reasonable Accommodations webinar

**Thursday, November 13
9:00 AM to 12:30 PM**

This training will assist the PHA in avoiding the exposure that is found in the failure to respond or properly address such direct and indirect requests. The scope of the training will cover the following: Difference Between a Reasonable Accommodation and Reasonable Modification, Tips to Avoid Legal Exposure (short list of DON'Ts based upon case law), Review of Qualifying Disability, What Can (and Cannot) a Housing Provider ask regarding a Disability, The Importance of the Interactive Dialogue, Review of the Nexus between the Disability and the Accommodation, When the issue of Reasonable Accommodation can be raised, Exceptions to the Duty to Accommodate, Service Animals, Assistance Animals & Comfort Animals.

Presented by: Atty. Manette Donovan

**Registration: \$169 for Members
Members \$469 for Non-Members**

Go to [MassNAHRO Professional Development](http://MassNAHRO.org) to register.

CLASSIFIEDS

To see all current classified ads and job descriptions, go to "Classifieds" page at www.massnahro.org. Classified ads are free of charge for members to post for any position. To post an ad on our website go to "Classifieds" page at www.massnahro.org or email info@massnahro.org.

c a l e n d a r

trainings, conferences, & events...

OCTOBER 30

Annual Awards Gala

Four Points Sheraton, Norwood

Tickets on sale now. Sponsorships available.

Visit www.massnahro.org for details.

NOVEMBER 14

Advancing Equitable Housing for Families Impacted by Incarceration Think Tank

Presented by Justice4Housing.

See page 6 for details. To register, visit www.massnahro.org.

DECEMBER 4

Intro to ChatGPT & Other AI Tools Think Tank

Presented by Edlin Ortiz, Worcester H.A.

See page 6 for details. To register, visit www.massnahro.org.

NOVEMBER 13

Reasonable Accommodations webinar

Presented by Atty. Manette Donovan.

See page 7 for details. To register, visit www.massnahro.org.

NOVEMBER 20

Common Property Management Issues Tewksbury H.A.

Presented by Kevin Braga, Cambridge H.A.

See page 6 for details. To register, visit www.massnahro.org.

DECEMBER 16

Emergency & Evacuation Planning webinar

Presented by Rich Menard, Worcester H.A. & Chris Partridge, Arlington H.A.

See page 3 for details. To register, visit www.massnahro.org.

Massachusetts Chapter
National Association of
Housing & Redevelopment Officials
990 Washington Street, Suite 209
Dedham, MA 02026
617-367-0008
www.massnahro.org

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State Estimated Waiting Period for Applications:

As of November 3, 2025

P-1,2,3,4,6

Family	6 mos.-1 yr.
Elderly	6 mos.-1 yr.
NE (Eld./Disabled)	6 mos.-1 yr.
Modified	1+ yrs.

P- 7

Family (Local)	2 + yrs.
Family (Non-Local)	3 + yrs.
Elderly (Local)	2 + yrs.
Elderly (Non-Local)	3 + yrs.
NE (Elderly/Disabled)	3 + yrs.
Congregate	1 + yrs.
Modified	3 + yrs.

VETERANS

Family	6 mos.-1 yr.
Elderly	6 mos.-1 yr.

Federal Waiting Period for Applications:

FEDERAL

Family	3 + yrs.
Elderly	2 + yrs.

SECTION 8

Local/Preference	5 + yrs.
Non Local	10 + yrs.
PBV/Pequot	4 + yrs.
PBV/ARC	0 mos.-3 mos.

STATE PUBLIC HOUSING
WAITING LIST
CHAMP

As of November 3, 2025

Number of Family Applicants	51,647
Number of Elderly/Handicapped Applicants	12,003

FEDERAL PUBLIC HOUSING
WAITING LIST

Federal Family	Pending	0
	Eligible	<u>22</u>
	Total	22
Federal Elderly	Pending	0
	Eligible	<u>257</u>
	Total	257

SECTION 8

Section 8 HCV Centralized Waitlist Salem Preference	Pending	0
	Eligible	<u>2387</u>
	Total	2387
Pequot Highlands Project-Based Voucher Program	Pending	25
	Eligible	<u>1481</u>
	Total	1506
New Point Acquisition PBV	Pending	24
	Eligible	<u>682</u>
	Total	706

(MRVP Converted to Housing Choice Voucher 07/04-08/04)

(Federal Family closed 12/02)

(Federal Family opened 06/21/05 – 07/31/05)

(Federal Family closed 07/31/05)

(Federal Family opened 06/11/12)

(Federal Family closed 10/31/2012)

(Federal Preferences Changed To Local Only 12/17/2012)

(Section 8 closed 12/02)

(Joined Centralized 04/03/2006)

(State Family Closed 11/01/06)

(State Family Reopened 05/06/08 – 07/31/08 2 & 3 BR Only)

(State Family Extended thru 09/30/08 2 & 3 BR Only)

(State Family Closed 09/30/08)

(State Family Reopened 07/01/11 – 10/31/11 2 & 3 BR Only)

(State Family Closed 10/31/2011)

(State Family Reopened 12/15/15 - 03/31/2016 2 & 3 BR Only)(State Family Closed 3/31/16)

July 19, 2018 State Waitlist Migrated to CHAMP (new applications after this date logged into CHAMP) (Oct. 15 – 30, 2018 Applications received entered into Lottery Nov. 9, 2018)

Unit Address	City	State	Bedroom Size	Admission Date	Action Type	Move Out Reason	Effective Date
70 Rainbow Terrace	Salem	MA	2	09/28/2021	End Participation		10/02/2025
34 Rainbow Terrace	Salem	MA	3	11/07/2018	End Participation		10/28/2025

Unit Address	City	State	Bedroom Size	Admission Date	Action Type	Move Out Reason	Effective Date
12A Pioneer Terrace	Salem	MA	1	03/27/2013	End Participation		10/14/2025
8D Pioneer Terrace	Salem	MA	1	10/22/2025	New Admission		10/22/2025
27 Charter St Unit: 410	Salem	MA	1	09/17/2025	End Participation		10/07/2025
27 Charter St Unit: 409	Salem	MA	1	10/15/2025	New Admission		10/15/2025
45 St Peter St Unit: 211	Salem	MA	1	10/14/2025	New Admission		10/14/2025
45 St Peter St Unit: 212	Salem	MA	1	05/30/2023	End Participation		10/31/2025

Salem CHAMP List report

Date Pulled	List ID	Criteria	# Applicants Pulled	DNR & Deselected	Eligible candidates	Offers	Offers Accepted	Rejected Units	List Status
1/9/2025	27678490	2BR Family	100		3	2	2	0	List is closed
1/9/2025	27683495	3BR Family	100		1	0	0	0	List is closed
2/20/2025	27965777	1BR Elderly No Stairs	50		7	6	5	1	List is closed
3/18/2025	28143955	1 BR Elderly Stairs	50		0	0	0	0	List is closed
5/6/2025	28494309	2BR Family	100		3	3	3	0	List is closed
5/8/2025	28522337	3BR Family	100		0	0	0	0	List is closed
6/2/2025	28652467	1BR Elderly No Stairs	50		3	3	1	2	List is closed
6/2/2025	28654469	1 BR Elderly Stairs	50		2	2	2	0	List is closed
8/7/2025	29097912	2BR Family	100		3	2	2	0	No 2BR units available
8/12/2025	29124939	1BR Elderly No stairs	50		5	5	3	1	List is closed
8/27/2025	29227045	1BR Elderly Stairs	50		2	2	1	0	Pending 1 Offer Acceptance
9/8/2025	29274092	1BR Elderly No Stairs	50		7	7	3	2	Pending 2 Offer Acceptance
10/6/2025	29472290	1BR Elderly Stairs	50		4	4	1	0	Pending 3 Offer Acceptance
11/4/2025	29670488	1BR Elderly No Stairs	50						

Update on Capital Modernization Projects

The following are items either underway in design or under construction. These projects are funded by our 5-year state Capital Improvement Plan (EOHLC) and annual federal capital plan (HUD).

STATE-FUNDED PROJECTS

Our latest annual state formula funding award is \$796,966 to be used at 14 state developments (626 units in 82 buildings).

Underway (In Design or Under Construction)

258150 **Electrical Upgrade** at Pioneer Terrace

Project is to upgrade the electrical service. The project was bid and Laracy is the apparent low bidder at \$1,104,000.00. Awaiting final contract execution

258173 **Exterior Upgrades Water Infiltration (HILAPP)** at Charter St.

Project to solve the leaking in 2 units and the office. EOHLC awarded architect contract. In design. EOHLC authorized going forward with work to be performed in a sample unit on the 2nd floor as a test case. This work occurred. There are larger flashing and other issues being investigated with the Architect and EOHLC. SHA met with EOHLC and architect 5/30/24. Many design issues were discussed. A larger scope of work will be designed. The east elevation will be the scope. Plans and cost estimate are under review with EOHLC. Schematic design documents were approved 10/03/25.

258182 **Exterior Door Replacement** at Bates, Norton, Dalton, Park/Prince

Derby Square Architects was assigned by EOHLC. Schematic design documents were approved 10-19-25.

258188 **ARPA Federal Pacific Electric Panel Replacement and Gas Stove Replacement** at Rainbow, Leefort, Bertram, Colonial, Norton, Pioneer, Morency, Ruane, Dalton, and Phillips.

Rogue Engineering's bid document package was approved by EOHLC. The project has been advertised for bids. GC bids are due 11/14/25.

258189 **Walk-in tub/shower study** at Charter St. and Morency Manor and Phillips House

Environmental Restoration Inc. has begun work in the available Charter St. vacant unit. Serious plumbing issues behind the walls due to the age of the building at Charter. To keep the project on track the contractor has moved on to Phillips, then Morency, and then back to Charter. There will be a designated unit in each building identified as a unit to be used as temporary bathroom facilities for units where work is being performed.

258194 **Elevator upgrades** at Charter

Work to update the elevators to new code to be completed by our current elevator company under contract. Delta Beckwith Elevator Co. has just completed work on the 1st car which will be tested by the state 11/04/25. Then work will move to the 2nd car.

258197 **Site Work and Concrete Repair** at Colonial Terrace

Design work has been completed and reviewed. Due to the time required for bidding and contract execution and the approaching winter season public bidding will be delayed until January 2026 for better and more accurate pricing. Work is anticipated to begin in Spring 2026.

258198 **Sustainability Study- flood zone, rising sea level** at Pioneer and Congress

Project with EOHLIC. No information yet.

258199 **Roof Replacement** at Ruane

Derby Square Architects was assigned by EOHLIC. This building is in a historic district. A fee of \$21,600 has been agreed upon. Design work has begun. Schematic design documents were submitted on 10/21/25.

258200 **Boilers and HW Tanks Replacement** at Phillips

The equipment is at the end of its useful life. BLW Engineers has been assigned. Design work, budget, and funding are under review at EOHLIC. Difficulty with this project with EOHLIC parameters of no fossil fuel, building is in a historic district, etc.

258202 **Window Replacement** at Charter

EOHLIC has created a work order. Awaiting price proposal from architect.

258203 **Aging in Place at Routine Turnovers** at 667

Small accessibility/adaptability upgrades will be incorporated during the routine vacancy turnover process

Projects to be Assigned to a Designer, Designed and Bid

TBA Kitchen & bath modernization at Bertram as funding will allow.

258202 Charter St. Window Replacement

FEDERALLY-FUNDED PROJECTS

Zisson Roof Replacement: The SHA was awarded CPA funds to help fund this work. Andrew Brockway is the architect on the project. Project received approval by the Historic Commission, Redevelopment Authority, and the Design Review Board. Low bidder is Leading Way Construction Co. Inc. with a bid of \$388,600.00. Contracts have been signed. City of Salem has delayed construction start date to 11/01 due to October crowds/tourists in the area. Work to begin 11/03/25.

Report to the Board 11/1/2025

11/1/2025

0 New Voucher Out-Looking

Voucher's Out-looking Time Frame:

Under 30 Days	0
30-60 Days	0
60-90 Days	0
90-120 Days	0
120+	0

Voucher

Issued since 10/1/2025:	0
PBV Admissions since 10/1/2025:	0

**Units Under Lease as of
November 1, 2025**

1160

Salem Housing Authority

27 Charter Street
Salem, MA 01970

(978)744-4431



Cathy Hoog
Executive Director

October 1- 31 2025

Kathlyn Valianti

October RSC MONTHLY REPORT

NEW Referrals to RSC: 7

Ongoing case management/referrals: 50

Category:

<u>Mental / behavioral health</u>	<u>8</u>
Housing stabilization support / One time deep cleaning	<u>9</u>
Re-certification assistance	<u>3</u>
Housekeeping/ Agency referrals	<u>8</u>
Wellness & fitness	
<u>Nutrition/Snap applications, food pantry resources</u>	<u>6</u>
<u>Healthy food options, food pantry and emergency shopping</u>	<u>6</u>
<u>Community Engagement / Socialization</u>	<u>46</u>
<u>Health insurance / Health supportive services</u>	<u>6</u>
<u>Other- Distribution of flyers and community events</u>	<u>206</u>
Other	

Referrals made out to other places:

- Salem COA, Salem Pantry, Life Bridge, Gather Health HOU, MassHealth, Healthy Living, Element Care, AgeSpan, Disability Resource Center, Element Care, North Shore Community Action Program, Salem Commission on Disability, Mission of Deeds, REACT, Salem Fire Department, Salem PD, The Brookhouse for Woman, The Bertram House, Big Brother/Big Sister, Salvation Army, Gardener Mattress Company, Care Dimensions

Other important info to include:

10/1/25 React High Risk team meeting, Salem Council on Aging

Salem Housing Authority

27 Charter Street
Salem, MA 01970



(978)744-4431

Cathy Hoog
Executive Director

10/2/25 Monthly Manager's Zoom meeting

10/6/25 Pioneer Terrace Community hours

10/7/25 Private Conference; The Carrick's

10/8/25 EPNG Networking meeting at Rosewood Nursing Home; Roman Music Therapy

10/13/25 Pioneer Terrace Community hours

10/15/25 RSC monthly meeting

10/20/25 Pioneer Terrace Community hours

10/21/25 Disability Resource Center Presentation at Charter St. Community room

Element Care/PACE Presentation at Charter St.

10/22/25 Gather Bingo, Pioneer Terrace and Morency, Medicare Presentation

9/23/25 Zoom Quarterly meeting with Agespan

8/18/25 Council on Aging, Outreach staff, Ingrid and Salem Board of Health Nurse, Kelly; outreach for Salem Housing Tenants, coffee, food and information sharing held at Pioneer Community Room. Well attended event.

- Wellness Wednesday with Kelley Annese will be starting October, 2025 – wellness classes will be the Morency Community Room and Pioneer Terrace Community Room
 - Lunch with Congregate tenants at Ruane, next scheduled for November, with RSC's
 - Planning social monthly community engagement / workshops at Morency, Dalton, and Pioneer community rooms (Coffee hour, snacks, movies, games, etc.)
 - Weekly office hours at Pioneer Terrace Community Room.
 - Meet with other community organizations- EPNG, NorthShore REACT
 - Posted informative pamphlets to upcoming workshops and Events.
- Post up local events-Social Programs, Transportation schedule, and outing events hosted by COA.

Salem Housing Authority

27 Charter Street
Salem, MA 01970

(978)744-4431



Cathy Hoog
Executive Director

October 1- 31, 2025
Mary Ann Kairouz

RSC MONTHLY REPORT

Total Referrals to RSC:
New Referrals: 10
On-Going Referrals: 25

Categories of services and the number of tenants provided services:

<u>Mental-behavioral health</u>	<u>10</u>
<u>Housing stabilization support, one-time deep cleaning</u>	<u>8</u>
<u>Re-certification assistance</u>	<u>5</u>
<u>Housekeeping, laundry services through agency referrals</u>	<u>8</u>
<u>Wellness and fitness workshops</u>	<u>0</u>
<u>Nutrition-SNAP application and list food pantry resources</u>	<u>6</u>
<u>healthy food access-assisting at food panty & emergency food shopping</u>	<u>84</u>
<u>Community Engagement, Socialization-----</u>	<u>46</u>
<u>Family socialization-----</u>	<u>76</u>
<u>Health insurance, Health supportive services</u>	<u>30</u>
<u>Other- resources posted in buildings</u>	<u>118</u>
<u>Other-passed out to tenants</u>	<u>164</u>
<u>Other- robo calls of events or services</u>	
A. <u>Families Robo call</u>	<u>166</u>
B. <u>Elderly Robo Calls</u>	<u>303</u>

Referrals made out to other places:

Salem Housing Authority

27 Charter Street
Salem, MA 01970



(978)744-4431

Cathy Hoog
Executive Director

-
- Salem COA, Salem Pantry, Life Bridge, Gather Health HOU, MassHealth, Element Care, AgeSpan, Disability Resource Center, Element Care, REACT, Salem Fire Department, Salem PD, Bootstrap, SAVERS, Aldi.

Other important info to include:

- Upcoming: Nov 18th- Charter St Coffee Hour Social with community providers-COA, City of Salem Constituent Services Director/Latino Affairs Julio Mota, Gather Health, Medicare Specialist, and Therapy dog.
- 10/21/25 Disability Resource Center Presentation at Charter St. Community room Element Care/PACE Presentation at Charter St.
- 10/22/25 Gather Bingo, Pioneer Terrace and Morency, Medicare Presentation
- 9/23/25 Zoom Quarterly meeting with Agespan
- 10/2/25 Monthly Manager's Zoom meeting
- 10/7/25 Private Conference; Leefort Tenant Couple
- 10/8/25 EPNG Networking meeting at Rosewood Nursing Home; Roman Music Therapy
- RSCs planning Holiday Event for Families on December 10th at Salem State University
- Brainstorming Meeting for Fall Wellness Fair, Vet Van, Flu/COVID Vaccine Clinic, and Families Events
- Planning Elderly tenants for holiday events
- Planning 250th event for fall or spring with RSCs Kathlyn and Alex
- Wellness Wednesday with Kelley Annese will be restarting November 5rd, 2025 –Nov 19 and Dec 3rd, 2025, wellness classes will be the Morency Community Room and Pioneer Terrace Community Room
- Posted informative pamphlets to upcoming workshops and Events
- Socialize and interact as well as Supervision of Salem Pantry distribution to residents on Monday at Morency Manor and Dalton Place.
- Weekly office hours at Morency Manor and some office hrs. at Pioneer
- Charter St Monday Pantry hours assist with helping tenants with mobility limitations with putting them in bags or assisting with carrying.
- Meet with other community organizations- COA, EPNG, NorthShore REACT, City of Salem Members, Local Providers and/or Medical Professionals.

Salem Housing Authority

27 Charter Street
Salem, MA 01970

(978)744-4431



Cathy Hoog
Executive Director

October 1- 31, 2025
Alexandra Dominguez

RSC MONTHLY REPORT

Total Referrals to RSC:
New Referrals: 1
On-Going Referrals: 11

Categories of services and the number of tenants provided services:

<u>Mental-behavioral health</u>	<u>1</u>
Housing stabilization support, one-time deep cleaning	<u>11</u>
Re-certification assistance	<u>3</u>
Housekeeping, laundry services through agency referrals	<u>0</u>
Wellness and fitness workshops	<u>0</u>
<u>Nutrition-SNAP application and list food pantry resources</u>	<u>4</u>
<u>healthy food access-assisting at food panty & emergency food shopping</u>	<u>39</u>
<u>Community Engagement, Socialization</u>	<u>39</u>
<u>Health insurance, Health supportive services</u>	<u>1</u>
<u>Other- resources posted in buildings</u>	<u>0</u>
<u>Other-passed out to tenants</u>	<u>0</u>
<u>Other- robo calls of events or services</u>	
A. <u>Families Robo call</u>	<u>0</u>
B. <u>Elderly Robo Calls</u>	<u>0</u>

Referrals made out to other places:

- Salem Mobile Pantry, Elliot, Pathways for Children/Pathways Family Resource Center, Mass Hire, DDS, Samaritan's Charitable Society of Salem, Metro Credit Union (Financial Course), RAFT, NSCAP (Home Energy Assistance Program)

Salem Housing Authority

27 Charter Street
Salem, MA 01970



(978)744-4431

Cathy Hoog
Executive Director

•
Other important info to include:

- RSCs have a Holiday Event planned for December 10th at the Salem State University Bookstore area, for residents at Rainbow and all the Housing NOW participants.
- Socialize and interact at Salem Pantry distribution to residents on Wednesday at Rainbow.
- Attended EOHLIC's Specialized Family & Supportive Services (SFSS) Open Office Hours (OOH) virtually on: Children's Advocacy Center – Preventing Child Abuse, 10/8/25, NAHRO RSC Roundtable, Discussion: Government Shut down & DTA Benefits 10/9/25, EEC + CFCE
- Six Families on the Housing Now Program have been housed for 8 months and will be successfully graduating from the program in November 2025.
- Two Families on the Housing Now Program have been housed for 7 months.
- Six of the Housing Now families are at Rainbow, One at Garden, and One at Phillips.

**Salem Housing Authority
Work Order Complete/Incomplete Report**

Program(s): State 667

Project(s): State Elderly 667-5: **27 Charter St**

Status: All, Status Included: Emergency, Urgent, Routine, Preventive, Vacant, Inspection UPCS, Contract, Inspection Other, Employee: All, Created From: 10/1/2025, Created Through: 12/1/2025, Completed From: 1/1/1900, Completed Through: 12/31/9999

Work Order By Priority					
Priority	Count	Incomplete	Complete	Tot. Days	Avg. Days
Emergency	25	0	25	9.69	0.39
Routine	45	16	29	126.64	4.37
Inspection UPCS	2	0	2	28.29	14.15
Totals:	72	16	56	164.62	2.94

Work Order By Employee					
Assigned Employee	Count	Incomplete	Complete	Tot. Days	Avg. Days
Alex Vega Lopez	30	3	27	17.06	0.63
Bill Norris	5	3	2	2.17	1.09
Charlie Felton	1	0	1	0.04	0.04
Christian Rudloff	3	0	3	0.34	0.11
Craig Powers	13	3	10	57.04	5.70
Etienne Fabrune	3	1	2	0.42	0.21
John DeBenedictis	4	0	4	1.05	0.26
Michael Fitzgerald	6	1	5	42.30	8.46
Patric Bishop	11	5	6	44.20	7.37
Totals:	72	16	56	164.62	2.94

**Salem Housing Authority
Work Order Complete/Incomplete Report**

Program(s): State 667

Project(s): State Elderly 667-6: **Morency Manor**

Status: All, Status Included: Emergency, Urgent, Routine, Preventive, Vacant, Inspection UPCS, Contract, Inspection Other, Employee: All, Created From: 10/1/2025, Created Through: 12/1/2025, Completed From: 1/1/1900, Completed Through: 12/31/9999

Work Order By Priority					
Priority	Count	Incomplete	Complete	Tot. Days	Avg. Days
Emergency	8	0	8	23.21	2.90
Urgent	1	0	1	0.08	0.08
Routine	7	1	6	13.17	2.20
Preventive	1	0	1	1.17	1.17
Inspection UPCS	2	0	2	7.71	3.86
Totals:	19	1	18	45.34	2.52

Work Order By Employee					
Assigned Employee	Count	Incomplete	Complete	Tot. Days	Avg. Days
Alex Vega Lopez	8	0	8	6.58	0.82
Bill Norris	3	0	3	3.26	1.09
Charlie Felton	1	0	1	0.75	0.75
Christian Rudloff	1	1	0	0.00	N/A
Craig Powers	2	0	2	10.25	5.13
Michael Fitzgerald	1	0	1	7.21	7.21
Patric Bishop	3	0	3	17.29	5.76
Totals:	19	1	18	45.34	2.52

500 total work orders this month.

**Salem Housing Authority
Work Order Complete/Incomplete Report**

Program(s): State 667

Project(s): State Elderly 667-1A: ~~Bertram Terrace~~

Status: All, Status Included: Emergency, Urgent, Routine, Preventive, Vacant, Inspection UPCS, Contract, Inspection Other, Employee:
All, Created From: 10/1/2025, Created Through: 12/1/2025, Completed From: 1/1/1900, Completed Through: 12/31/9999

Work Order By Priority					
Priority	Count	Incomplete	Complete	Tot. Days	Avg. Days
Emergency	11	3	8	9.21	1.15
Routine	17	6	11	62.84	5.71
Totals:	28	9	19	72.05	3.79

Work Order By Employee					
Assigned Employee	Count	Incomplete	Complete	Tot. Days	Avg. Days
Alex Vega Lopez	13	1	12	13.00	1.08
Bill Norris	1	0	1	0.08	0.08
Christian Rudloff	1	1	0	0.00	N/A
Craig Powers	4	2	2	24.88	12.44
John DeBenedictis	3	3	0	0.00	N/A
Ken Sousa	1	1	0	0.00	N/A
Michael Fitzgerald	1	0	1	5.25	5.25
Patric Bishop	4	1	3	28.84	9.61
Totals:	28	9	19	72.05	3.79

**Salem Housing Authority
Work Order Complete/Incomplete Report**

Program(s): State 667

Project(s): State Elderly 667-2: ~~Colonial Terrace~~

Status: All, Status Included: Emergency, Urgent, Routine, Preventive, Vacant, Inspection UPCS, Contract, Inspection Other, Employee:
All, Created From: 10/1/2025, Created Through: 12/1/2025, Completed From: 1/1/1900, Completed Through: 12/31/9999

Work Order By Priority					
Priority	Count	Incomplete	Complete	Tot. Days	Avg. Days
Emergency	12	0	12	29.76	2.48
Routine	14	3	11	67.60	6.15
Inspection UPCS	1	0	1	15.25	15.25
Totals:	27	3	24	112.61	4.69

Work Order By Employee					
Assigned Employee	Count	Incomplete	Complete	Tot. Days	Avg. Days
Alex Vega Lopez	9	1	8	6.62	0.83
Bill Norris	2	0	2	27.38	13.69
Charlie Felton	1	0	1	0.13	0.13
Christian Rudloff	1	0	1	0.13	0.13
Craig Powers	2	1	1	0.96	0.96
John DeBenedictis	1	1	0	0.00	N/A
Ken Sousa	1	0	1	0.13	0.13
Luis Lopez	1	0	1	12.13	12.13
Michael Fitzgerald	9	0	9	43.88	4.88
Patric Bishop	3	0	3	21.25	7.08
Totals:	27	3	24	112.61	4.69

**Salem Housing Authority
Work Order Complete/Incomplete Report**

Program(s): State 667

Project(s): State Elderly 667-3: **Norton (3A) and Bates (3B)**

Status: All, Status Included: Emergency, Urgent, Routine, Preventive, Vacant, Inspection UPCS, Contract, Inspection Other, Employee:
All, Created From: 10/1/2025, Created Through: 12/1/2025, Completed From: 1/1/1900, Completed Through: 12/31/9999

Work Order By Priority					
Priority	Count	Incomplete	Complete	Tot. Days	Avg. Days
Emergency	4	0	4	6.87	1.72
Routine	6	1	5	6.22	1.24
Totals:	10	1	9	13.09	1.45

Work Order By Employee					
Assigned Employee	Count	Incomplete	Complete	Tot. Days	Avg. Days
Alex Vega Lopez	4	0	4	0.88	0.22
Bill Norris	3	1	2	5.38	2.69
Christian Rudloff	1	0	1	0.04	0.04
Patric Bishop	2	0	2	6.79	3.40
Totals:	10	1	9	13.09	1.45

**Salem Housing Authority
Work Order Complete/Incomplete Report**

Program(s): State 667

Project(s): State Elderly 667-4: **Pioneer Terrace**

Status: All, Status Included: Emergency, Urgent, Routine, Preventive, Vacant, Inspection UPCS, Contract, Inspection Other, Employee:
All, Created From: 10/1/2025, Created Through: 12/1/2025, Completed From: 1/1/1900, Completed Through: 12/31/9999

Work Order By Priority					
Priority	Count	Incomplete	Complete	Tot. Days	Avg. Days
Emergency	28	3	25	34.59	1.38
Routine	24	7	17	121.23	7.13
Vacant	1	1	0	0.00	N/A
Inspection UPCS	4	1	3	2.92	0.97
Totals:	57	12	45	158.74	3.53

Work Order By Employee					
Assigned Employee	Count	Incomplete	Complete	Tot. Days	Avg. Days
Alex Vega Lopez	25	2	23	30.38	1.32
Bill Norris	3	2	1	12.92	12.92
Charlie Felton	1	0	1	0.92	0.92
Christian Rudloff	1	1	0	0.00	N/A
Craig Powers	5	0	5	21.09	4.22
Etienne Fabrone	1	0	1	0.08	0.08
John DeBenedictis	4	3	1	0.04	0.04
Ken Sousa	3	0	3	13.05	4.35
Luis Lopez	1	1	0	0.00	N/A
Michael Fitzgerald	10	2	8	45.50	5.69
Patric Bishop	6	1	5	34.76	6.95
Totals:	57	12	45	158.74	3.53

**Salem Housing Authority
Work Order Complete/Incomplete Report**

Program(s): State 667

Project(s): State Elderly 667-7A: **Ruane Building**

Status: All, Status Included: Emergency, Urgent, Routine, Preventive, Vacant, Inspection UPCS, Contract, Inspection Other, Employee:
All, Created From: 10/1/2025, Created Through: 12/1/2025, Completed From: 1/1/1900, Completed Through: 12/31/9999

Work Order By Priority					
Priority	Count	Incomplete	Complete	Tot. Days	Avg. Days
Emergency	5	3	2	3.79	1.90
Routine	3	0	3	7.20	2.40
Totals:	8	3	5	10.99	2.20

Work Order By Employee					
Assigned Employee	Count	Incomplete	Complete	Tot. Days	Avg. Days
Alex Vega Lopez	3	1	2	0.04	0.02
Craig Powers	1	0	1	6.08	6.08
John DeBenedictis	1	1	0	0.00	N/A
Michael Fitzgerald	1	1	0	0.00	N/A
Patric Bishop	2	0	2	4.87	2.44
Totals:	8	3	5	10.99	2.20

**Salem Housing Authority
Work Order Complete/Incomplete Report**

Program(s): State 667

Project(s): State Elderly 667-7B: **Dalton Building**

Status: All, Status Included: Emergency, Urgent, Routine, Preventive, Vacant, Inspection UPCS, Contract, Inspection Other, Employee:
All, Created From: 10/1/2025, Created Through: 12/1/2025, Completed From: 1/1/1900, Completed Through: 12/31/9999

Work Order By Priority					
Priority	Count	Incomplete	Complete	Tot. Days	Avg. Days
Emergency	8	1	7	7.53	1.08
Routine	8	0	8	24.23	3.03
Inspection UPCS	1	1	0	0.00	N/A
Totals:	17	2	15	31.76	2.12

Work Order By Employee					
Assigned Employee	Count	Incomplete	Complete	Tot. Days	Avg. Days
Alex Vega Lopez	5	0	5	0.28	0.06
Bill Norris	2	0	2	1.58	0.79
Craig Powers	4	1	3	9.33	3.11
Etienne Fabrune	1	0	1	0.08	0.08
John DeBenedictis	2	1	1	0.08	0.08
Michael Fitzgerald	2	0	2	13.41	6.71
Patric Bishop	1	0	1	7.00	7.00
Totals:	17	2	15	31.76	2.12

**Salem Housing Authority
Work Order Complete/Incomplete Report**

Program(s): State 200

Project(s): State Family 200-2: **Rainbow Terrace**

Status: All, Status Included: Emergency, Urgent, Routine, Preventive, Vacant, Inspection UPCS, Contract, Inspection Other, Employee:
All, Created From: 10/1/2025, Created Through: 12/1/2025, Completed From: 1/1/1900, Completed Through: 12/31/9999

Work Order By Priority					
Priority	Count	Incomplete	Complete	Tot. Days	Avg. Days
Emergency	54	6	48	39.55	0.82
Routine	92	13	79	162.51	2.06
Preventive	15	7	8	102.01	12.75
Vacant	1	1	0	0.00	N/A
Inspection UPCS	6	4	2	1.17	0.59
Totals:	168	31	137	305.24	2.23

Work Order By Employee					
Assigned Employee	Count	Incomplete	Complete	Tot. Days	Avg. Days
Alex Vega Lopez	48	3	45	33.41	0.74
Bill Norris	3	1	2	14.54	7.27
Charlie Felton	9	0	9	23.33	2.59
Christian Rudloff	9	0	9	6.71	0.75
Craig Powers	13	3	10	37.43	3.74
Etienne Fabrune	7	3	4	0.75	0.19
Gary Dean	39	2	37	13.21	0.36
John DeBenedictis	7	4	3	0.45	0.15
Ken Sousa	2	1	1	0.13	0.13
Luis Lopez	44	6	38	13.54	0.36
Michael Fitzgerald	20	4	16	105.46	6.59
Patric Bishop	21	8	13	56.28	4.33
Totals:	168	31	137	305.24	2.23

**Salem Housing Authority
Work Order Complete/Incomplete Report**

Program(s): **State 705**

Project(s): State Family 705-2A: 33 Park St./26 Prince St., State Family 705-2B: 117 Congress St., State Family 705-3: Farrell Court, State Family +3

Status: All, Status Included:Emergency, Urgent, Routine, Preventive, Vacant, Inspection UPCS, Contract, Inspection Other, Employee: All, Created From: 10/1/2025, Created Through: 12/1/2025, Completed From: 1/1/1900, Completed Through: 12/31/9999

Work Order By Priority					
Priority	Count	Incomplete	Complete	Tot. Days	Avg. Days
Emergency	17	0	17	22.78	1.34
Routine	14	3	11	56.68	5.15
Inspection UPCS	1	0	1	1.08	1.08
Totals:	32	3	29	80.54	2.78

Work Order By Employee					
Assigned Employee	Count	Incomplete	Complete	Tot. Days	Avg. Days
Alex Vega Lopez	15	0	15	8.32	0.55
Christian Rudloff	1	0	1	0.13	0.13
Craig Powers	3	0	3	13.25	4.42
Etienne Fabrune	2	0	2	1.21	0.61
Michael Fitzgerald	5	3	2	15.17	7.59
Patric Bishop	7	0	7	42.46	6.07
Totals:	32	3	29	80.54	2.78

**Salem Housing Authority
Work Order Complete/Incomplete Report**

Program(s): **Federal Public Housing**

Project(s): Federal Elderly: Barton and Zisson, Federal Family: 122.5 Boston, 73 Boston, 121.5 Br +1

Status: All, Status Included:Emergency, Urgent, Routine, Preventive, Vacant, Inspection UPCS, Contract, Inspection Other, Employee: All, Created From: 10/1/2025, Created Through: 12/1/2025, Completed From: 1/1/1900, Completed Through: 12/31/9999

Work Order By Priority					
Priority	Count	Incomplete	Complete	Tot. Days	Avg. Days
Emergency	14	0	14	11.46	0.82
Routine	7	2	5	44.54	8.91
Inspection UPCS	6	2	4	31.20	7.80
Inspection Other	7	2	5	42.84	8.57
Totals:	34	6	28	130.04	4.64

Work Order By Employee					
Assigned Employee	Count	Incomplete	Complete	Tot. Days	Avg. Days
Alex Vega Lopez	20	2	18	42.84	2.38
Christian Rudloff	2	0	2	1.08	0.54
Craig Powers	5	0	5	30.12	6.02
Etienne Fabrune	8	4	4	24.17	6.04
Michael Fitzgerald	1	0	1	11.00	11.00
Patric Bishop	3	1	2	20.83	10.42
Totals:	34	6	28	130.04	4.64

**Salem Housing Authority
Work Order Complete/Incomplete Report**

Program(s): State 200

Project(s): State Family 200-1: Garden Terrace

Status: All, Status Included: Emergency, Urgent, Routine, Preventive, Vacant, Inspection UPCS, Contract, Inspection Other, Employee:
All, Created From: 10/1/2025, Created Through: 12/1/2025, Completed From: 1/1/1900, Completed Through: 12/31/9999

Work Order By Priority					
Priority	Count	Incomplete	Complete	Tot. Days	Avg. Days
Emergency	13	0	13	26.79	2.06
Routine	9	1	8	33.22	4.15
Inspection UPCS	4	2	2	6.42	3.21
Totals:	26	3	23	66.43	2.89

Work Order By Employee					
Assigned Employee	Count	Incomplete	Complete	Tot. Days	Avg. Days
Alex Vega Lopez	12	1	11	17.20	1.56
Bill Norris	2	0	2	6.17	3.09
Christian Rudloff	1	0	1	4.71	4.71
Craig Powers	3	1	2	0.17	0.09
Etlenne Fabrone	2	1	1	7.92	7.92
John DeBenedictis	2	0	2	0.12	0.06
Ken Sousa	1	0	1	5.04	5.04
Michael Fitzgerald	1	0	1	4.75	4.75
Patric Bishop	5	0	5	20.35	4.07
Totals:	26	3	23	66.43	2.89

Salem Housing Authority Work Order Complete/Incomplete Report

Program(s): Federal Public Housing, State 689, State 705, State 667 +19

Project(s): Federal Elderly: Barton and Zisson, Federal Family: 122.5 Boston, 73 Boston, 121.5 Br +43

Status: All, Status Included: Vacant, Employee: All, Created From: 10/1/2025, Created Through: 12/1/2025, Completed From: 1/1/1900, Completed Through: 12/31/9999

Work Order By Priority					
Priority	Count	Incomplete	Complete	Tot. Days	Avg. Days
Vacant	2	2	0	0.00	N/A
Totals:	2	2	0	0.00	N/A

Work Order By Employee					
Assigned Employee	Count	Incomplete	Complete	Tot. Days	Avg. Days
John DeBenedictis	2	2	0	0.00	N/A
Totals:	2	2	0	0.00	N/A

W/O #	Priority	Unit Address	Tenant Name	Created Date	Completed Date	Mat.	Labor	Actual	Billed
Program: State 667									
Project: State Elderly 667-4: Pioneer Terrace									
76641	Vacant	12A Pioneer Terrace		10/14/2025 08:00 AM		\$0.00	\$0.00	\$0.00	\$0.00
Description: repair vacancy									
Task Description: 507 - Rec vacancy for repair									
State Elderly 667-4: Pioneer Terrace			Incomplete: 1	Complete: 0		\$0.00	\$0.00	\$0.00	\$0.00
State 667			Incomplete: 1	Complete: 0		\$0.00	\$0.00	\$0.00	\$0.00
Program: State 200									
Project: State Family 200-2: Rainbow Terrace									
76643	Vacant	70 Rainbow Terrace		10/02/2025 08:00 AM		\$0.00	\$0.00	\$0.00	\$0.00
Description: repair vacancy									
Task Description: 507 - Rec vacancy for repair									
State Family 200-2: Rainbow Terrace			Incomplete: 1	Complete: 0		\$0.00	\$0.00	\$0.00	\$0.00
State 200			Incomplete: 1	Complete: 0		\$0.00	\$0.00	\$0.00	\$0.00
Grand Totals:			Incomplete: 2	Complete: 0		\$0.00	\$0.00	\$0.00	\$0.00

Salem Housing Authority Work Order Complete/Incomplete Report

Program(s): Federal Public Housing, State 689, State 705, State 667 +19

Project(s): Federal Elderly: Barton and Zisson, Federal Family: 122.5 Boston, 73 Boston, 121.5 Br +43

Status: All, Status Included: Vacant, Employee: All, Created From: 1/1/1900, Created Through: 12/31/9999, Completed From: 10/1/2025, Completed Through: 12/1/2025

Work Order By Priority					
Priority	Count	Incomplete	Complete	Tot. Days	Avg. Days
Vacant	3	0	3	101.99	34.00
Totals:	3	0	3	101.99	34.00

Work Order By Employee					
Assigned Employee	Count	Incomplete	Complete	Tot. Days	Avg. Days
Charlie Felton	1	0	1	63.33	63.33
John DeBenedictis	2	0	2	38.66	19.33
Totals:	3	0	3	101.99	34.00

W/O #	Priority	Unit Address	Tenant Name	Created Date	Completed Date	Mat.	Labor	Actual	Billed
Program: State 667									
Project: State Elderly 667-6: Morency Manor									
76048	Vacant	45 St Peter St Unit: 205		08/04/2025 08:00 AM	10/06/2025 04:00 PM	\$0.00	\$1,209.00	\$1,209.00	\$0.00
Description: repair vacancy									
Completed Description: pooch list treat for roaches cut installed shade wash window cut install sink base shelf replaced hvac filter. remove shower clean and apply 1 st coat of finish remove wire shelving install closet biform door install electrical plates repair front hall light. reinstall closet below door install wire shaves clean bathroom paint med cab install wire shelve remove kitchen faucets clean kitchen caulking area of tub and back splash. install door stop repair kitchen drawers and handle install cab door catches 2 Nd coat of floor finish. repair wall around toilet closet paper work .i removed the toilet. install toilet. i installed kitchen faucets									
Task Description: 507 - Rec vacancy for repair									
76414	Vacant	45 St Peter St Unit: 204		09/19/2025 08:00 AM	10/06/2025 04:00 PM	\$0.00	\$777.48	\$777.48	\$0.00
Description: repair vacancy									
Completed Description: patch in wall from curtain rode and areas where wire shelving needs to be reinstalled wash and repair window cut shade. sand prime and paint areas of wall repairs install bedroom closet accordion door install shade clean bathroom install new toilet seat. finish install accordion doors 2 hallway closets. prime and paint areas of wall repair install crone brackets stop lower san to secure window. installed wire shaving caulk area of tub clean kitchen wire out cabinets and shelves replaced hvac filter apply 1 st coat of floor finish. apply final coat of floor finish treat unit for roaches. complete unit and pipework									
Task Description: 507 - Rec vacancy for repair									
State Elderly 667-6: Morency Manor		Incomplete: 0		Complete: 2		\$0.00	\$1,986.48	\$1,986.48	\$0.00

W/O #	Priority	Unit Address	Tenant Name	Created Date	Completed Date	Mat.	Labor	Actual	Billed
Program: State 667									
Project: State Elderly 667-4: Pioneer Terrace									
76533	Vacant	1C Pioneer Terrace		09/24/2025 08:00 AM	10/15/2025 04:00 PM	\$0.00	\$742.14	\$742.14	\$0.00
Description: repair vacancy									
Completed Description: repair closet door and clean, install shades sand floor sand poly floors									
Task Description: 507 - Rec vacancy for repair									
State Elderly 667-4: Pioneer Terrace			Incomplete: 0	Complete: 1		\$0.00	\$742.14	\$742.14	\$0.00
State 667			Incomplete: 0	Complete: 3		\$0.00	\$2,728.62	\$2,728.62	\$0.00
Grand Totals:			Incomplete: 0	Complete: 3		\$0.00	\$2,728.62	\$2,728.62	\$0.00

Salem Housing Authority

Executive Director Performance Evaluation

COMMISSIONERS: Check the response that best reflects your opinion with regard to each of the following items:

- A response that is checked Exceeds or Below Expectations should be accompanied by an explanation.
- If a commissioner does not feel that they have sufficient knowledge to answer a category, then N/A should be checked.

This evaluation document will be included in the November 12, 2025 Board Packet, to be completed and turned into the Chairperson at or before the next scheduled Board meeting (December 2025). The Executive Director will be evaluated at the January 2026 meeting.

	Exceeds	Meets	Below Expectations	N/A
1. Prepares carefully for board meetings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Provides ample information to enable commissioners to make decisions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Is responsive to the concern of Board of Commissioners	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Answers questions of Board of Commissioners promptly	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Follows up promptly on request of the board	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. Keeps board fully informed about Housing Authority operations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

	Exceeds	Meets	Below Expectations	N/A
7. Delegates responsibilities to subordinates as necessary	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. Implements fully board policies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9. Interprets board policies to staff	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10. Is effective in management of business and fiscal affairs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11. Advises board on need for new and/or revised policies and procedures	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12. Handles media relations skillfully	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
13. Is adept in personnel management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
14. Conducts employee relations skillfully	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
15. Conducts resident relations skillfully and involves residents in housing issues	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
16. Is knowledgeable and up to date in Mass. housing laws and regulations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
17. Is effective in short and long range planning	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
18. Anticipates problems and is effective in preventive actions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
19. Maintains a good relationship with local government leaders	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

	Exceeds	Meets	Below Expectations	N/A
20. Maintains effective working relationship with DHCD and other state agencies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
21. Engaged in activities to provide own professional growth and development	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
22. Maintains good relations with local community agencies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
23. Is effective in maintaining a high level of occupancy and quick turnover of units	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
24. Maintains a schedule of unit inspections annually or as necessary	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
25. Is effective in reaching short term goals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
26. Is effective in reaching yearly progress towards long term goals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

The evaluator may add additional comments relative to commendations of the Executive Director's performance over the past year.

COMMENTS/COMMENDATIONS:

The evaluator may add recommendations for improvement in the Executive Director's performance for the upcoming year.

RECOMMENDATIONS FOR IMPROVEMENT:

Submitted by _____

Date: _____

**Salem Housing Authority
October 2025**

Check Name				
A-1 Exterminators, Inc.			FC: Exterior Stations FC: Sentinel Stations	\$650.00
Aflac	1	CHK	10-25: Aflac	\$450.36
AFSCME Council 93			09-28-25: Union Dues 10-05-25: Union Dues 10-12-25: Union Dues 10-19-25: Union Dues 10-26-25: Union Dues	\$520.65
Amesbury Chevrolet			#242: Oil Change and Inspection	\$225.00
Assabet Valley Housing Inspections LLC			Sec. 8: 17 Inspec. & 2 No show Sec. 8: 3 Inspec. & 1 No show Power: 40 Inspections	\$3,549.00
Avala Tac Awning, Inc. d/b/a Atlantic Awning	2	CHK	667-6/667-7B: Awning Balance	\$3,878.61
Baystate Interpreters, Inc.	3	CHK	09-05: 667-5: Interpreter: Gagnon 09-10: FSS Interpreter: Y. Gomez	\$220.00
BC Jaclen Tower Limited Partnership			10-25: Rent 11-25: Rents	\$3,340.00
Beals and Thomas, Inc.			258162 #11 A/E Basic	\$2,000.00
Bell Fund VI Salem LLC			10-25: Rent 11-25: Rents	\$18,533.04
Blue Triton Brands, Inc.			6/5 Gal. Water 3/5 Gal. Water Water & Cups 3/5 Gal. Water 3/5 Gal. Water & Cups 16a rt: 6/5 Gal. Water	\$227.35
BOFF LLC d/b/a Proxima Moving & Storage			1: Eviction	\$3,550.00
Boston Mutual Life Ins. Co.			10-25: Add'l Life	\$367.68
Brake & Clutch, Inc.			Fisher Plow Tune-Up	\$347.94
Canal Realty Development LLC			10-25 Rent 08-04/09-05: Sec. 8 Water & Sewer 11-25: Rent	\$10,114.68

Casey Lundregan Burns			All Legal Matters	\$35,652.77
Employee			09-27-25 Reimbursement: NNHRO Conf.	\$191.68
City Of Salem			Various Sites: 371,346 Cu. Ft.	\$46,877.97
City Of Salem			08-25: 685,989 Gals. Fuel 08-25: Sec.8: 30,876 Gals. Fuel	\$1,599.40
City Of Salem			07-25: 618,904 Gals. Fuel 07-25: Sec.8: 60,937 Gals, Fuel	\$1,523.52
Comcast				
4	CHK	Various Sites: Cable, Wifi Camera Connection		\$660.63
5	CHK	Various Sites: Cable, Wifi Camera Connection		\$769.71
6	CHK	Various Sites: Cable, Wifi Camera Connection		\$1,702.53
7	CHK	Various Sites: Cable, Wifi Camera Connection		\$557.81
				\$3,690.68
Commonwealth Of				
8	CHK	07-25/09-25: Active Employees 07-25/09-25: Survivors		\$139,373.91
9	CHK	07-25/09-25: Retirees 10-25: Health, Opins. & LTD		\$13,779.30
				\$153,153.21
Employee			Reimbursement: Boots	\$150.00
Elan Financial Services				
	INV	CC Payment 09/23/2025-10/22/2025		\$2,923.92
Dearborn Life Insurance				
10	CHK	09-25: STD		\$357.96
11	CHK	10-25: STD		\$447.45
				\$805.41
Employee			09-18: Mileage Reimbursement Adjustment	\$6.12
Dodge Tree Service, Inc.			09-12-25: Tree Work	\$4,800.00
Drizos Contracting LLC			258187 #2	\$24,282.75
Empower Retirement				
12	CHK	09-28-25: Deferred Comp		\$1,365.00
13	CHK	10-05-25: Deferred Comp.		\$1,365.00
14	CHK	10-12-25: Deferred Comp.		\$1,365.00
15	CHK	10-19-25: Deferred Comp.		\$1,365.00
16	CHK	10-26-25: Deferred Comp.		\$1,365.00
				\$6,825.00
Empower Retirement				

17	CHK	09-28-25: Deferred Comp. "OBRA"
18	CHK	10-05-25: Deferred Comp. "OBRA"
19	CHK	1-12-25: Deferred Comp. "OBRA"
20	CHK	10-19-25: Deferred Comp. "OBRA"
21	CHK	10-26-25: Deferred Comp. "OBRA"

\$859.47

Environmental Restorations, Inc.

258189 Reimb. 3
Permits

\$2,124.56

F.W. Webb Company

Maintenance Supplies
Zisson: Toilet & Accessories
Water Heating Tank & Accessories
Maint. Supplies
Bates: Maintenance Supplies
Circular Pump
Maintenance Supplies
FC: HTWT & Accessories
CT: Plumbing Supplies
Bertram: Zone Valves

CT: HTWT
Accessories

\$10,743.68

Fairweather Preservation Assoc. Lmt. Partnership

10-25: Rent 10/25
11-25 Rents 10/25

\$8,000.00

\$8,000.00

\$16,000.00

Fenton Ewald & Associates, P.C.

09-25: Accounting
08-25: Accounting

\$10,532.00

Fuss & O'Neill, Inc.

258150/#1: A/E Basic

\$20,000.00

Greater Salem Employees Federal Credit Union

09-28-25: Credit Union
10-05-25: Credit Union
10-12-25: Credit Union
10-19-25: Credit Union
10-26-25: Credit Union

\$4,000.00

Hayden's Safe & Lock Co., Inc.

Power: Repair Entry Door
26 PR: eplace Lever

\$1,162.87

Hayden's Systems, Inc.

NT: Fire Alarm Inspection
NT: Replace Fire Alarm Batteries
Bates: Fire Alarm Inspection
Bates: Replace Fire Alarm Batteries
705-4: Fire Alarm Inspection
705-4: Replace Fire Alarm Batteries
Bertram: Fire Alarm Inspection
Bertram: Replace Fire Alarm Batteries
CT: Replace Fire Alarm Batteries
CT: Fire Alarm Inspection
Zisson: Master Box Relocation

667-6: Fire Alarm
 Inspection
 667-6: Fire Alarm
 Batteries
 667-7B: Fire Alarm
 Inspection
 667-7B: Fire Alarm
 Batteries

\$6,591.08

HD Supply Facilities Maintenance

22 CHK Maintenance Supplies \$474.44

23 CHK Maintenance Supplies

\$3,134.91

\$3,609.35

HD Supply Inc. f/k/a The

Maintenance Supplies

\$5,107.09

Home Decor Group, LLC

667-5: Paint

\$221.96

Home Depot Commercial

24 CHK Maintenance Supplies

\$1,566.35

HR Direct

25 CHK Power: RSC Poster Service

\$107.95

Intellibeam LLC

Speakers
 09-25: 3 Lines: 911,
 Caller ID
 09-25: Computer
 Maintenance
 Computer, Mouse &
 Monitor

\$4,396.12

Employee

10-03-25: NAHRO
 Training
 Reimbursement

\$1,141.51

Resident

26 CHK 10-25: Utility Reimbursement

\$247.00

John Skouras & Co., Inc.

667-5/1 Bedroom with
 Cabinets
 NT: 1 Bedroom
 PT: 1 Bedroom

\$3,600.00

Kelley Annese

PRE.2004: 09-03/09-
 24: Wellness

\$1,000.00

Klein Home LP

HOS: Leefort PEHO 2
 Grant
 HOS: General Matters

\$1,290.00

M.A.H.A.M.S.

27 CHK 10-27/10-29 3/ Annual Conference 10/25

\$2,200.00

MacDonald Cabinet & Countertop Distributors, Inc.

PT: Kitchen Cabinets
 667-5: Lower Cabinets
 & Counter Tops
 667-5: Lower Cabinets
 & Countertop
 PT: Cabinets &
 Countertops
 CT: Kitchen Cabinets

\$11,856.00

Maestranzi Bros. Inc.

28 CHK Service Snow Blower

29 CHK 3 Toro Snow Blowers

\$10,321.13

Management Computer Services, Inc.		Add'l User: New Employee		\$394.00	
Employee		10-21: 667 Social Event		\$59.93	
Mass Floors, Inc.		667-6/ VCT Flooring Whole Unit 667-6/ VCT Flooring Whole Unit Zisson/ VCT Flooring Whole Unit RT/ Flooring Kitchen/Bathroom		\$25,448.75	
MassNAHRO	30	CHK	12-25: MPHA Training 12-25: MPHA Training	\$398.00	
Maureen Thomas		09-25: Reimburse M. Thomas		\$640.94	
McCarthy & Son Landscaping, Inc.		09-25: Landscape		\$6,951.75	
Employee		9-21-25: Reimbursement Boots		\$150.00	
Michael Russo Plumbing		Various Sites: (16) Boiler Maintenance		\$11,108.60	
Mini Warehousing, Inc.		10-25/11-25: 16A RT Storage 10-12/11-11: LT Resident Storage		\$235.00	
MTE Turf Equipment Solutions, Inc.		2025 Cushman Utility Cart		\$16,513.25	
N.S.H.E.D.A.		31	CHK	10-24-25: Legislative Breakfast	\$80.00
National Grid		32	CHK	667: 278 KWH 200: 180 KWH	\$128.55
		33	CHK	Sec. 8: 1,547 KWH	\$427.18
		34	CHK	200: 62 KWH 705-4: 20 KWH 667: 1,798 KWH 30: 164 KWH	\$987.05
		35	CHK	667: 498 KWH 200: 132 KWH 1705-4: 5 KWH 30: 124 KWH	\$348.16
					\$1,890.94
National Grid		36	CHK	667: 168,312 KWH 705: 627 KWH 30: 5889 KWH	\$5,447.96
		37	CHK	667: 168,312 KWH 705: 627 KWH 30: 5889 KWH	\$5,447.96
					\$10,895.92
National Grid		38	CHK	667: 1,665.8 Therms. 200: 157 Therms. 705-4: 0 Therms. 30: 291 Therms.	\$2,885.25
		39	CHK	667: .8 Therms.	

30: .3 Therms.

\$71.60

\$2,956.85

New England Direct Solutions, LLC

Bedbug Treatment

\$3,300.00

New England Mobile Systems, Inc.

10-25: GPS Monitoring

\$237.86

New England Reglaze, Inc.

40 CHK

RT: Reglaze Glaze Tub

7 GT & 2 9GT: Reglaze Tub

\$1,300.00

North of Boston Media Group/Accounting Department

Ad: 9-8: MHA: Paving Bid

Ad: 9-3/9-11: RFP 1st

9-8: MHA: Paving Bid

\$4,151.10

NRG Business Marketing

41 CHK

667: 1048.80 Therms

\$545.39

42 CHK

200: 163.2 Therms.

\$84.87

\$630.26

OnLine Information Services, Inc.

25 Criminal Reports

3 Income Verifications

\$652.60

\$652.60

Employee

09-16/09-25:

Reimburse Parking

09-30/10-9: Reimburse Parking

\$67.62

Pitney Bowes, Inc.

43 CHK

Sec. 8: 4/E-Z Seal

\$80.74

Printer Pro d/b/a Encore

Sec.8: 2/Toner Cartridges

\$154.64

PureSky Payment Services

07-01-25/07-31-25:

Solar

\$64,425.26

Quadrant Health Strategies

Physical: New Employee

\$188.00

Rafael Batista

09-25: Maintenance

667-5: Strip Wax Floor

1st Floor

\$5,500.00

Robert Half, Inc.

9-22-25 Contract

BuyOut Temp-to-hire

\$7,000.00

Employee

09-30-25: NNHRO

Reimbursement S.

Eschman

\$1,208.55

Salem Contributory

09-28-25: Retirement

10-05-25: Retirement

10-12-25: Retirement

10-19-25: Retirement

10-26-25: Retirement

08-21/10-09:

Retirement owed

\$27,245.37

Employee

SSP: Future Forward

Orientation Snacks

\$21.63

Spering Interactive

\$520.00

Staples Advantage

16A RT: Maintenance
Supplies

\$166.64

TASC

44 CHK

TASC: 9-30-25:
Monthly Fee

\$5.00

The Guardian Life Insurance

45 CHK

10-25: Admin
10-25: Dental

\$2,974.50

Thomas Mackey & Sons, Inc.

16A/RT: Catch Basin
Repair
667-5: Catch Basin
Repair

\$7,246.00

Tinti & Navis P.C.

09-03/09-04: General
Matters

\$240.00

Toshiba America Business

10-15/11-14: Sec. 8
Copier
10+15/11+15: Sec. 8 &
667-5 Copier
10-15/11-15: Sec. 8 &
667-5 Scanners

\$1,459.00

Total Administrative Services Corp

Medical FSA 10-02-25:
TASC 4922-3771-3301

10-09-25: TASC: 4922-
3771-3301
10-16-25: TASC: 4922-
3771-3301
10-23-25: TASC: 4922-
3771-3301
10-30-25: TASC: 4922-
3771-3301

\$903.75

Total Administrative Services Corporation(TASC)

Dependent FSA 10-02-
25: TASC 4922-3771-
3301
10-09-25: TASC: 4922-
3771-3301
10-19-25: TASC: 4922-
3771-3301
10-23-25: TASC: 4922-
3771-3301
10-30-25: TASC: 4922-
3771-3301

\$480.75

Town of Marblehead

46 CHK

09-02/09-29 Trash
Disposal

\$1,382.40

Verizon

47 CHK

08-11/09-10: Cell
Phones

\$1,324.34

48 CHK

09-11/10-10: Cell
Phones

\$1,330.86

\$2,655.20

Vermont Mutual Insurance

49 CHK

30: 09-25/09-26
Umbrella

\$1,995.00

Vestis Group, Inc.

40 CHK

Pre 2004: Jackets

\$1,010.93

W. B. Mason Co., Inc

Sec. 8: Office Supplies

Sec. 8: Office Supplies

Sec. 8: Office Supplies

Office Supplies

Office Supplies

Office Supplies
Office Supplies

\$1,864.10

Winer Bros

Hardware
PT: Maintenance
Supplies

\$119.11

Harpers Payroll

10-02 Payroll	\$39,292.52
State & Federal Withholding	\$9,749.29
Harpers Invoice	\$101.53
10-09 Payroll	\$41,109.09
State & Federal Withholding	\$10,404.14
Harpers Invoice	\$103.43
10-16 Payroll	\$42,422.63
State & Federal Withholding	\$10,727.20
Harpers Invoice	\$103.63
10-23 Payroll	\$41,821.07
State & Federal Withholding	\$10,591.23
Harpers Invoice	\$101.53
10-30 Payroll	\$38,691.39
State & Federal Withholding	\$9,474.83
Harpers Invoice	\$101.53

\$265,437.11

TOTAL: Checks: 40

\$931,481.91

Department of Housing & Community Development - Quarterly Statement of Revenue & Expense
 Period Reported 10/1/2024 to

051-1 (7-04)
 9/30/2025

LHA NAME: Salem Housing Authority
 FISCAL YEAR ENDING: 9/30/25

Prog. No. 4001

No of Units 676
 Months 12
 Unit Mos 8112
 An. Un. Mes 8112

QUARTERS COVERED: 1 1 thru 2 1 thru 3 1 thru 4

LINE NO.	ACCT. NO.	CLASSIFICATION	APPROVED BUDGET		ACTUAL TO DATE	
			ANNUAL AMOUNT	PUM	PUM	AMOUNT
REVENUE						
1	3110	Shelter Rent - Tenants	3,839,181	473.27	454.36	3,685,776.12
2	3115	Shelter Rent - Federal Section 8	0	0.00	0.00	0.00
3	3190	Nondwelling Rentals	0	0.00	0.00	0.00
4	3400	Administrative Fees - MRVP	0	0.00	0.00	0.00
5	3610	Interest on Investments - Unrestricted	60,000	7.40	4.21	34,186.25
6	3611	Interest on Investments - Restricted	0	0.00	0.00	0.00
7	3690	Other Revenue	30,000	3.70	8.44	68,447.72
8	3691	Other Revenue - Retained	139,321	17.17	53.97	437,784.91
9	3692	Other Revenue - Operating Reserve	0	0.00	0.00	
10	3693	Other Revenue - Net Metering	0	0.00	0.00	0.00
11	3801	Operating Subsidy - 4001	3,341,772	411.95	219.68	1,782,058.00
12	3802	Operating Subsidy - MRVP Landlords				0.00
13	3803	Restricted Grants Received				0.00
14	3920	Gain/Loss From Sale/Disp.of Prop.				0.00
15	3000	TOTAL REVENUE	7,410,274	913.50	740.66	6,008,253.00
EXPENSES						
16	4110	Administrative Salaries	706,989	87.15	95.64	775,833.86
17	4120	Compensated Absences			5.03	40,830.19
18	4130	Legal	270,000	33.28	34.15	276,989.44
19	4140	Members Compensation	26,325	3.25	2.50	20,318.89
20	4150	Travel & Related Expenses	6,848	0.84	0.46	3,705.25
21	4170	Accounting Services	19,542	2.41	2.35	19,046.00
22	4171	Audit Costs	15,630	1.93	3.33	26,981.88
23	4180	Penalties & Interest			0.00	0.00
24	4190	Administrative Other	354,057	24.15	44.41	360,251.50
25	4191	Tenant Organization	10,375	1.28	1.90	15,380.78
26	4100	TOTAL ADMINISTRATION	1,399,391	153.01	189.76	1,539,337.79
27	4310	Water & Sewer	508,869	62.73	60.01	486,799.23
28	4320	Electricity	859,245	105.92	97.17	788,213.79
29	4330	Gas	113,944	14.05	9.79	79,445.75
30	4340	Fuel	0	0.00	0.00	0.00
31	4360	Energy Conservation	0	0.00	2.11	17,116.17
32	4390	Other	0	0.00	0.00	0.00
33	4391	Solar Operator Costs	0	0.00	37.98	308,056.76
34	4392	Net Meter Utility Credit (Negative Number)	0	0.00	(40.09)	(325,172.93)
35	4300	TOTAL UTILITIES	1,482,058	182.70	166.97	1,354,458.77
36	4410	Maintenance Labor	860,342	106.06	99.52	807,305.49
37	4420	Materials & Supplies	300,000	36.98	36.56	296,551.75
38	4430	Contract Costs	461,000	56.83	66.81	541,950.66
39	4400	TOTAL MAINTENANCE	1,621,342	199.87	202.89	1,645,807.90
40	4510	Insurance	1,781,993	219.67	33.07	268,253.99
41	4520	Payment In Lieu of Taxes	13,500	1.66	1.63	13,233.56
42	4540	Employee Benefits	631,833	77.89	85.20	691,117.97
43	4541	Employee Benefits - OPEB GASB 75	0	0.00	6.07	49,247.00
44	4542	Pension Expense - OPEB GASB 68	0	0.00	0.00	0.00
45	4570	Collection Loss	40,000	4.93	6.67	54,072.41
46	4580	Interest Expense		0.00	0.00	0.00
47	4590	Other General Expense	0	0.00	0.00	0.00
48	4500	TOTAL GENERAL EXPENSES	2,467,326	304.16	132.63	1,075,924.93
49	4610	NonCapitalized NonRoutine	300,000	36.98	27.46	222,753.01
50	4611	NonCapitalized Equipment	75,000	9.25	9.75	79,085.40
51	4612	Restricted Reserve Expenditures	0	0.00	0.00	0.00
52	4715	Housing Assistance Payments	0	0.00	0.00	0.00
53	4801	Depreciation Expense			92.98	754,284.85
54	4600	TOTAL OTHER EXPENSES	375,000	46.23	130.19	1,056,123.26
55	4000	TOTAL EXPENSES	7,345,117	905.46	822.44	6,671,652.65
56	2700	NET INCOME/(DEFICIT)	65,157	8.03	(81.78)	(663,399.65)
CAPITAL EXPENDITURES "MEMO"						
57	7520	Replacement of Equipment-Capitalized		0.00	0.00	0.00
58	7540	Betterments & Additions - Capitalized		0.00	0.00	0.00
59	7500	Total Capital Expenditures	0	0.00	0.00	0.00
MRVP YEAR END SETTLEMENT "MEMO"						
60	4715	Housing Assistance Payments		0.00	0.00	0.00
61		Total Operating Subsidy Received		0.00	0.00	0.00
62		Underpayment Due LHA (Line 52 - Line 53)	0	0.00	0.00	0.00
		or				
63		Overpayment Due DHCD (Line 52 - Line 51)				

DEPARTMENT OF HOUSING & COMMUNITY DEVELOPMENT BALANCE SHEET		051-2 (7-04) Salem Housing Authority	
		September 30, 2025	Period Ended
ASSETS		4001	Program Number
ACCOUNT NUMBER			<input checked="" type="checkbox"/> Administration <input type="checkbox"/> Modernization <input type="checkbox"/> Development
CASH			
1111	Cash Development or Modernization fund - Unrestricted	0.00	
1111.1	Cash Development or Modernization fund - Restricted	0.00	
1112	Cash Administration Fund - Unrestricted	706,696.66	
1112.1	Cash Administration Fund - Restricted	0.00	
1113	Cash - Escrow	0.00	
1114	Security Deposit and Pet Deposit Fund Cash	8,157.01	
1117	Petty Cash	100.00	
1118	Change Fund	0.00	714,953.67
ACCOUNTS RECEIVABLE			
1121	Federal and DHCD-Section 8 Subsidy-Shelter Rent	0.00	
1122	Tenants Accounts Receivable	148,240.13	
1122.1	Tenants Accounts Receivable - Repayment (Contra)	0.00	
1123	Allowance for Doubtful Accounts - Dwelling Rents	(47,054.73)	
1124	Accounts Receivable - Fraud/Retroactive	249,603.83	
1124.1	Fraud/Retroactive- Contra	(249,603.83)	
1125	Accounts Receivable Subsidy	0.00	
1129	Accounts Receivable - Other	0.00	
1130	Interprogram Due From	350,000.00	
1131	Allowance for Doubtful Accounts - Other	0.00	
1145	Accrued Interest Receivable	0.00	451,185.40
INVESTMENTS			
1162	Investments - Unrestricted		3,362,812.74
DEFERRED CHARGES			
1211	Prepaid Expenses	56,816.00	
1212/1213	Inventory/Net - Supplies and Fuel	0.00	
1290	Deferred Charges - Other	239,274.00	
1291	Deferred Outflow of Resources (GASB 68 related)	699,467.00	995,557.00
FIXED ASSETS			
1400.2	Cost Control Account - Development/Modernization	0.00	
1401	Land	2,074,807.00	
1402	Building and Building Improvements	41,005,881.54	
1403	Furniture, Equipment and Machinery - Dwellings	0.00	
1404	Other Equipment - Administration/Maintenance	686,419.12	
1405	Leasehold Improvements	0.00	
1406	Accumulated Depreciation	(39,052,056.91)	
1407	Infrastructure	0.00	
1408	Capital Leases	0.00	4,715,050.75
TOTAL ASSETS			10,239,559.56
LIABILITIES AND EQUITY			
ACCOUNTS PAYABLE			
2106	Bank Overdraft	0.00	
2111	Accounts Payable <=90 Days	0.00	
2111.1	Accounts Payable >90 Days Past Due	0.00	
2112	Contract Retentions	0.00	
2114	Tenants Security Deposits & Pet Deposits	8,157.01	
2115	Bid Deposits	0.00	
2117	Employee's Payroll Deductions	0.00	
2118	Accounts Payable - Subsidy Overpayment	1,160,522.00	
2119	Accounts Payable - Interfund	708,053.24	
2120	Accounts Payable - Other	0.00	1,874,732.25
ACCRUED LIABILITIES			
2130.2	Accrued Contingent Liability	0.00	
2135	Accrued Compensated Absences - Current Portion	97,120.50	
2137	Payment in Lieu of Taxes (PILOT)	0.00	
2138	Accrued Payroll	47,624.85	
2139	Accrued Liabilities - Other	371,199.41	
2140	Accrued Pension Liability (GASB 68 related)		515,944.76
DEFERRED CREDITS			
2240	Tenants Prepaid Rents	103,960.51	
2290	Undistributed Credits	0.00	
2291	Deferred Revenue - Subsidy	0.00	
2292	Deferred Revenue - Other	0.00	
2293	Deferred Inflows of Resources (GASB 68 related)	902,240.00	1,006,200.51
NOTES PAYABLE			
2299	Notes Payable Capital Borrowings - Current Portion	0.00	
2299.1	Notes Payable Operating Borrowings - Current Portion	0.00	0.00
NON-CURRENT LIABILITIES			
2301	Notes Payable Capital Borrowings - Non-Current Portion	0.00	
2301.1	Notes Payable Operating Borrowings - Non-Current Portion	0.00	
2335.01	Accrued Compensated Absences - Non-Current Portion	114,706.45	
2339	Other Non-Current Liabilities	0.00	
2339.1	Accrued OPEB Liabilities	2,186,483.00	
2339.2	Accrued Pension Liability	1,933,381.00	4,234,570.45
EQUITY (NET ASSETS)			
2700	Net Income (Deficit)	0.00	
2802	Invested in Capital Assets, net of Related Debt	4,715,050.75	
2805	Net Assets - Restricted	0.00	
2806	Net Assets - Unrestricted	75.52%	2,215,697.84
2806.1	Net Assets - OPEB		(2,761,030.00)
2806.2	Net Assets - Unrestricted for Pension Liability		2,608,111.59
TOTAL LIABILITIES AND EQUITY			10,239,559.56

See Accountants' Compilation Report

Salem Housing Authority

Program No.

051 -3 (07-04)
163024001

SCHEDULE I
INVESTMENTS - ACCOUNT 1162

<u>BANK</u>	<u>TYPE</u>	<u>DUE DATE</u>	<u>AMOUNT INVESTED</u>
0			267,554.64
0	-		3,095,258.10
	-		
	-		
	-		
TOTAL AS PER BALANCE SHEET			<u>3,362,812.74</u>

SCHEDULE II
DEFERRED CHARGES - OTHER - ACCOUNT 1290

<u>ITEM</u>	<u>AMOUNT</u>
Retirement	239,274.00
0	436,142.00
TOTAL AS PER BALANCE SHEET	
	<u>675,416.00</u>

SCHEDULE III
ACCOUNTS PAYABLE - OTHER - ACCOUNT 2111

<u>ITEM</u>	<u>AMOUNT</u>
	0.00
	0.00
Federal Public	0.00
	0.00
TOTAL AS PER BALANCE SHEET	
	<u>0.00</u>

SCHEDULE IV
SCHEDULE OF NONROUTINE EXPENDITURES

	<u>AMOUNT</u>
EXTRAORDINARY MAINTENANCE	
See attached schedule	222,753.01
Total - Account 4610	<u>222,753.01</u>
EQUIPMENT PURCHASE - NON-CAPITIALIZED	
See attached schedule	79,085.40
Total - Account 4611	<u>79,085.40</u>
RESTRICTED RESERVE EXPENDITURES	
See attached schedule	0.00
Total - Account 4612	<u>0.00</u>
PROPERTY OF EQUIPMENT - CAPITALIZED	
See attached schedule	0.00
Total - Account 7520	<u>0.00</u>
PROPERTY BETTERMENTS AND ADDITIONS - CAPITALIZED	
See attached schedule	0.00
Total - Account 7540	<u>0.00</u>

* Total Amounts Should Agree With Page 051-1 (Attach Schedule if Needed)

LHA Name: **Salem Housing Authority**
 Program No. **163024001**

Quarter Ending: **9/30/2025**
 Fiscal Year Ending: **9/30/25**

ACTUAL AMOUNT (\$)

2802 Computation of Invested in Fixed Assets Net

of Depreciation and Related Debt

	Fixed Assets at End of Current Year	
(1)	(A/C 1400.2 thru 1404, 1406(not), 1407)	43,767,107.66
(2)	Less: Accumulated Depreciation End Of Current Year (A/C 1406)	39,052,056.91
(3)	Less: Capital Debt End of Current Year (A/C 2299 & 2301)	0.00
(4)	Sub Total (invested in Capital Assets End of Year)((1)-(2)-(3))	4,715,050.75
(5)	Balance in Account 2802 End of Prior Year	5,469,335.60
(6)	Prior Period Adjustments Capital Before Closing (A/C 2803 01)	0.00
(7)	Equity Transfers Capital Before Closing (A/C 2803 02)	0.00
(8)	Balance in Account 2802 Before Provision (Reduction) Invested in Capital Assets ((5)+(6)+(7))	5,469,335.60
(9)	Provision for (or Reduction of) Invested in Capital Assets ((4)-(8))	(754,284.85)

2805 Net Assets Restricted

(10)	Restricted Net Assets End of Prior Year (A/C 2805)	0.00
(11)	Restricted Grants Received (A/C 3803)	0.00
(12)	Net Assets Released From Restriction (A/C 4612)	0.00
(13)	Restricted Net Assets at End of Current Year ((10)+(11)+(12))	0.00

2806 Net Assets Unrestricted (Operating Reserve)

(14)	Unrestricted Net Assets At End of Prior Year (A/C 2806)	2,075,565.64												
(15)	Prior Year Adjustments Operating Before Closing (A/C 2807 01)													
	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 70%;">Description</th> <th style="width: 20%;">Amount</th> <th style="width: 10%;"></th> </tr> </thead> <tbody> <tr> <td></td> <td style="text-align: center;">0.00</td> <td style="text-align: right;">0.00</td> </tr> <tr> <td></td> <td style="text-align: center;">0.00</td> <td></td> </tr> <tr> <td></td> <td style="text-align: center;">0.00</td> <td></td> </tr> </tbody> </table>	Description	Amount			0.00	0.00		0.00			0.00		
Description	Amount													
	0.00	0.00												
	0.00													
	0.00													
(16)	Equity Transfers Operating Before Closing (A/C 2807 02)													
	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 70%;">Description</th> <th style="width: 20%;">Amount</th> <th style="width: 10%;"></th> </tr> </thead> <tbody> <tr> <td>Operating funds</td> <td style="text-align: center;">0.00</td> <td style="text-align: right;">0.00</td> </tr> <tr> <td>transferred from</td> <td style="text-align: center;">0.00</td> <td></td> </tr> <tr> <td>State Modernization</td> <td style="text-align: center;">0.00</td> <td></td> </tr> </tbody> </table>	Description	Amount		Operating funds	0.00	0.00	transferred from	0.00		State Modernization	0.00		
Description	Amount													
Operating funds	0.00	0.00												
transferred from	0.00													
State Modernization	0.00													
(17)	Net Income (Loss) (Line 50 of Operating Statement)	(663,399.65)												
(18)	Less: Provision for (or Reduction of) Invested Capital Assets (Line 9)	754,284.85												
(19)	Restricted Grants Received Included in Net Income (Line 11)	0.00												
(20)	Net Assets Released From Restriction (Line 12)	0.00												
	GASB 75 Current Year Expense (A/C 4541)	49,247.00												
(21)	Unrestricted Net Assets at End of Year ((14)+(15)+(16)+(17)+(18)+(19)+(20))	2,215,697.84												

DEPARTMENT OF HOUSING & COMMUNITY DEVELOPMENT

APPENDIX B
(TO 050-1
AND 051-1)

OPERATING SUBSIDY CALCULATION "ANUEL"
(ALLOWABLE NONUTILITY EXPENSE LEVEL)
BUDGET AND ACTUAL (ACTUAL USED AT YEAR END ONLY)

LHA Name: Salem Housing Authority
Fiscal Year Ending 9/30/25

Program No. 4,001

	1ST	2ND	3RD	4TH
Quarter				X

- 1. REVENUE (050-1/051-1 LINES 1 + 2 + 3 + 5 + 7)
- 2. NON-UTILITY COST (ANUEL - PR. YR. APPROV. PER LINE 3 ON APPENDIX B)
- 3. ALLOWABLE INCREASE (LINE 2 X 12%) 442,917
- 3A. APPROPRIATE % OF LINE 3 (COLUMN 3 ONLY)
- 4. DHCD APPROVED OPERATING COSTS EXEMPTIONS

Trash removal - all sites	25,000
---------------------------	--------

- 5. UTILITIES (Line 29 050-1 for Budget)
(Line 29 051-1 for Actual)
- 6. OPERATING SUBSIDY PRIOR TO APPROVED EXEMPTIONS (1 MINUS 3 MINUS 4 MINUS 5) (IF RESULTS ARE A POSITIVE NUMBER USE ZERO)
- 7. LINE 6 (IF -0- ENTER -0- OR CONVERT NEGATIVE AMOUNT TO BE POSITIVE)
- 8. DHCD APPROVED EXEMPTIONS DIRECT REIMBURSEMENT

Resident Service Coordinator NOW	60,000
Resident Service Coordinator - Regional	70,000
Insurance Payment Reimbursement	1,500,000

REDUCE ACTUAL SUBSIDY BY COST OVERRUNS

	BUDGET	ACTUAL	OVERRUN
9. 4110	706,989	775,834	(68,845)
10. 4150	6,848	3,705	0
11. Total			(68,845)

- 12. VACANCY PENALTY
- 13. TOTAL SUBSIDY (LINE 7 + 8 - 11) (050-1 OR 051-1)
- 14. REDUCE ACTUAL SUBSIDY BY THE AMOUNT THAT WOULD CAUSE THE OPERATING RESERVE BALANCE TO BE IN EXCESS OF 50% OF LINE 46 ON FORM 050-1 (SEE APPENDIX C LINE 8)
- 15. ACTUAL OPERATING SUBSIDY EARNED (LINE 12 MINUS 13) (NO LESS THAN LINE 8)
- 16. ACTUAL OPERATING SUBSIDY RECEIVED
- 17. DEBIT ACCOUNT 1125 UNDERPAYMENT DUE FROM DHCD
- 18. CREDIT ACCOUNT 2118 OVERPAYMENT DUE TO DHCD

	050-1 1	2	051-1 3	4
	BUDGETED AMOUNT	DHCD MODIFIC.	ACTUAL AMOUNT	DHCD MODIFIC.
1. REVENUE	3,929,181		3,788,410	
2. NON-UTILITY COST	3,690,978			
3. ALLOWABLE INCREASE	4,133,895		4,133,895	
3A. APPROPRIATE % OF LINE 3				
4. DHCD APPROVED OPERATING COSTS EXEMPTIONS				
Trash removal - all sites	25,000		25,000	
5. UTILITIES	1,482,058		1,354,459	
6. OPERATING SUBSIDY PRIOR TO APPROVED EXEMPTIONS	(1,711,772)		(1,724,944)	
7. LINE 6	1,711,772		1,724,944	
8. DHCD APPROVED EXEMPTIONS				
Resident Service Coordinator NOW	60,000		60,000	
Resident Service Coordinator - Regional	70,000		70,000	
Insurance Payment Reimbursement	1,500,000		0	
12. VACANCY PENALTY			4,041	
13. TOTAL SUBSIDY	3,341,772		1,782,058	
14. REDUCE ACTUAL SUBSIDY BY THE AMOUNT THAT WOULD CAUSE THE OPERATING RESERVE BALANCE TO BE IN EXCESS OF 50% OF LINE 46 ON FORM 050-1			0	
15. ACTUAL OPERATING SUBSIDY EARNED			1,782,058	
16. ACTUAL OPERATING SUBSIDY RECEIVED			2,942,580	
17. DEBIT ACCOUNT 1125 UNDERPAYMENT DUE FROM DHCD			0	
18. CREDIT ACCOUNT 2118 OVERPAYMENT DUE TO DHCD			1,160,522	

DEPARTMENT OF HOUSING & COMMUNITY DEVELOPMENT
Salem Housing Authority
CALCULATION TO DETERMINE IF CURRENT YEAR OPERATING SUBSIDY
WILL CAUSE THE OPERATING RESERVE TO EXCEED MAXIMUM AMOUNT ALLOWED

APPENDIX C

1. FULL OPERATING RESERVE 50% OF LINE 49 050-1 (BUDGET COLUMN 3) CURRENT FISCAL YEAR		<u>3,672,558.50</u>
2. OPERATING RESERVE BALANCE (ACCOUNT 2806) END OF LAST LAST FISCAL YEAR		<u>2,075,565.64</u>
3. ADJUSTED NET INCOME		
NET INCOME (LINE 50 051-1)	(663,399.65)	
SUBTRACT OPERATING SUBSIDY (LINE 09 051-1)	(1,782,058.00)	
ADD GASB 75 CURRENT EXPENSE (LINE 39 FROM BUDGET)	49,247.00	
Note: ADD RESTRICTED RESERVE EXPENDITURES	0.00	
ADD DEPRECIATION (LINE 47 051-1)	754,284.85	
SUBTRACT REPLACEMENTS (LINE 51 051-1)	0.00	
SUBTRACT BETTERMENTS (LINE 52 051-1)	0.00	
Note: SUBTRACT PRINCIPAL PORTION OF DEBT SERVICE PAYMENTS	0.00	
ADD OR SUBTRACT PRIOR YEAR ADJ. ACCT. 2807 PER 051-6	0.00	
TOTAL ADJUSTED NET INCOME		<u>(1,641,925.80)</u>
4. LINE 2 PLUS 3 OPERATING RESERVE BALANCE BEFORE SUBSIDY		<u>433,639.84</u>
5. SUBSIDY ALLOWED TO AUGMENT THE OPERATING RESERVE TO BE NOT MORE THAN 100% FULL RESERVE (LINE 1 MINUS 4)		<u>3,238,918.66</u>
6. OPERATING SUBSIDY ALLOWED LINE 5 (IF LINE 5 IS NEGATIVE USE - 0 -)		<u>3,238,918.66</u>
7. BRING OVER SUBSIDY LINE 12, COLUMN 3, APPENDIX B		<u>1,782,058.00</u>
8. IF LINE 6 MINUS 7 IS POSITIVE USE ZERO ON THIS LINE (LINE 8) IF RESULTS IS NEGATIVE PUT AS A NEGATIVE AMOUNT ON THIS LINE (LINE 8)		<u>0.00</u>
9. REDUCTION OF OPERATING SUBSIDY - LINE 8 (IF - 0 - ENTER - 0 - OR CONVERT NEGATIVE AMOUNT TO BE POSITIVE. BRING THIS AMOUNT TO APPENDIX B, LINE 13)		<u>0.00</u>

See Accountants' Compilation Report

Department of Housing & Community Development - Quarterly Statement of Revenue & Expense
 Period Reported 10/1/2024 to 9/30/2025

051-1 (7-04)

LHA NAME: Salem Housing Authority
 FISCAL YEAR ENDING: 9/30/2025

Prog. No. MRVP

No of Units 16
 Months 12
 Unit Mos 561

QUARTERS COVERED: 1 1 thru 2 1 thru 3 1 thru 4

LINE NO.	ACCT. NO.	CLASSIFICATION	APPROVED BUDGET		ACTUAL TO DATE	
			ANNUAL AMOUNT	PUM	PUM	AMOUNT
REVENUE						
1	3110	Shelter Rent - Tenants				0.00
2	3115	Shelter Rent - Federal Section 8				0.00
3	3190	Nondwelling Rentals				0.00
4	3400	Administrative Fees - MRVP	29,700	52.94	55.00	30,855.00
5	3610	Interest on Investments - Unrestricted	600	1.07	1.05	587.06
6	3611	Interest on Investments - Restricted	0	0.00	0.00	0.00
7	3690	Other Revenue	0	0.00	0.00	0.00
8	3691	Other Revenue - Retained	0	0.00	0.00	0.00
9	3692	Other Revenue - Operating Reserve	0	0.00	0.00	0.00
10	3693	Other Revenue - Energy Net Meter	0	0.00	0.00	0.00
11	3801	Operating Subsidy - 4001		0.00	0.00	0.00
12	3802	Operating Subsidy - MRVP Landlords	903,039	1,609.70	1,609.70	903,039.00
13	3803	Restricted Grants Received		0.00	0.00	0.00
14	3920	Gain/Loss From Sale/Disp.of Prop.		0.00	0.00	0.00
15	3000	TOTAL REVENUE	933,339	1,663.71	1,665.74	934,481.06
EXPENSES						
16	4110	Administrative Salaries	13,765	24.54	24.52	13,755.54
17	4120	Compensated Absences	0	0.00	1.80	1,009.11
18	4130	Legal	500	0.89	0.52	292.10
19	4140	Members Compensation	0	0.00	0.00	0.00
20	4150	Travel & Related Expenses	0	0.00	0.00	0.00
21	4170	Accounting Services	1,668	2.97	2.73	1,529.00
22	4171	Audit Costs	642	1.14	0.56	312.00
23	4180	Penalties & Interest	0	0.00	0.00	0.00
24	4190	Administrative Other	2,500	4.46	4.99	2,801.72
25	4191	Tenant Organization	0	0.00	0.00	0.00
26	4100	TOTAL ADMINISTRATION	19,075	34.00	35.11	19,699.47
27	4310	Water & Sewer			0.00	0.00
28	4320	Electricity			0.00	0.00
29	4330	Gas			0.00	0.00
30	4340	Fuel			0.00	0.00
31	4360	Energy Conservation			0.00	0.00
32	4390	Other			0.00	0.00
33	4391	Solar Operating Costs			0.00	0.00
34	4392	Net Meter Utility Credit (Negative Amount)			0.00	0.00
35	4300	TOTAL UTILITIES	0	0.00	0.00	0.00
36	4410	Maintenance Labor			0.00	0.00
37	4420	Materials & Supplies			0.00	0.00
38	4430	Contract Costs			0.00	0.00
39	4400	TOTAL MAINTENANCE	0	0.00	0.00	0.00
40	4510	Insurance	439	0.78	0.58	323.00
41	4520	Payment In Lieu of Taxes		0.00	0.00	0.00
42	4540	Employee Benefits	5,524	9.85	7.18	4,025.44
43	4541	Employee Benefits - OPEB GASB 45	0	0.00	15.24	8,550.00
44	4542	Pension Expense - GASB 68	0	0.00	0.00	0.00
45	4570	Collection Loss	0	0.00	0.00	0.00
46	4580	Interest Expense		0.00	0.00	0.00
47	4590	Other General Expense	0	0.00	0.00	0.00
48	4500	TOTAL GENERAL EXPENSES	5,963	10.63	22.99	12,898.44
49	4610	NonCapitalized NonRoutine	0	0.00	0.00	0.00
50	4611	NonCapitalized Equipment	0	0.00	0.00	0.00
51	4612	Restricted Reserve Expenditures	0	0.00	0.00	0.00
52	4715	Housing Assistance Payments	903,039	1,609.70	1,609.70	903,039.00
53	4801	Depreciation Expense	0	0.00	0.00	0.00
54	4600	TOTAL OTHER EXPENSES	903,039	1,609.70	1,609.70	903,039.00
55	4000	TOTAL EXPENSES	928,077	1,654.33	1,667.80	935,636.91
56	2700	NET INCOME/(DEFICIT)	5,262	9.38	(2.06)	(1,155.85)
CAPITAL EXPENDITURES "MEMO"						
57	7520	Replacement of Equipment-Capitalized		0.00	0.00	0.00
58	7540	Betterments & Additions - Capitalized		0.00	0.00	0.00
59	7500	Total Capital Expenditures	0	0.00	0.00	0.00
60	7600	EXCESS REVENUE OVER EXPENSES	5,262	9.38	(2.06)	(1,155.85)
MRVP YEAR END SETTLEMENT "MEMO"						
61	4715	Housing Assistance Payments		0.00	1,609.70	903,039.00
62		Total Operating Subsidy Received		0.00	1,611.57	904,089.00
63		Underpayment Due LHA (Line 52 - Line 53) or	0	0.00	0.00	0.00
64		Overpayment Due DHCD (Line 52 - Line 51)				1,050.00

See Accountants' Compilation Report

DEPARTMENT OF HOUSING & COMMUNITY DEVELOPMENT

Salem Housing Authority

BALANCE SHEET

September 30, 2025

Period Ended

MRVP/DMH

Program Number

ASSETS

 Administration Modernization Development

ACCOUNT NUMBER

CASH

1111	Cash Development or Modernization fund - Unrestricted	0.00	
1111.1	Cash Development or Modernization fund - Restricted	0.00	
1112	Cash Administration Fund - Unrestricted	223,698.89	
1112.1	Cash Administration Fund - Restricted	0.00	
1113	Cash - Escrow	0.00	
1114	Security Deposit	0.00	
1114.1	Pet Deposit	0.00	
1117	Petty Cash	0.00	
1118	Change Fund	0.00	223,698.89

ACCOUNTS RECEIVABLE

1121	Federal and DHCD—Section 8 Subsidy-Shelter Rent	0.00	
1122	Tenants Accounts Receivable	0.00	
1122.1	Tenants Accounts Receivable - Repayment (Contra)	0.00	
1123	Allowance for Doubtful Accounts - Dwelling Rents	0.00	
1125	Accounts Receivable Subsidy	0.00	
1129	Accounts Receivable - Other	0.00	
1130	Interprogram Due From	39,879.10	
1131	Allowance for Doubtful Accounts - Other	0.00	
1145	Accrued Interest Receivable	0.00	39,879.10

INVESTMENTS

1162	Investments - Unrestricted		0.00
------	----------------------------	--	------

DEFERRED CHARGES

1211	Prepaid Expenses	128.00	
1212/1213	Inventory/Net - Supplies and Fuel	0.00	
1290	Deferred Charges - Other	2,088.00	
1291	Deferred Outflow of Resources (GASB 68 related)	4,589.00	6,805.00

FIXED ASSETS

1400.2	Cost Control Account - Development/Modernization	0.00	
1401	Land	0.00	
1402	Building and Building Improvements	0.00	
1403	Furniture, Equipment and Machinery - Dwellings	0.00	
1404	Other Equipment - Administration/Maintenance	70,839.58	
1405	Leasehold Improvements	0.00	
1406	Accumulated Depreciation	(70,839.58)	
1407	Infrastructure	0.00	
1408	Capital Leases	0.00	0.00

TOTAL ASSETS 270,382.99

LIABILITIES AND EQUITY

ACCOUNTS PAYABLE

2106	Bank Overdraft	0.00	
2111	Accounts Payable <=90 Days	0.00	
2111.1	Accounts Payable >90 Days Past Due	0.00	
2112	Contract Costs	0.00	
2114	Tenants Security Deposits	0.00	
2114.1	Tenants Pet Deposits	0.00	
2115	Bid Deposits	0.00	
2117	Employee's Payroll Deductions	0.00	
2118	Accounts Payable - Subsidy Overpayment	5,504.00	
2119	Accounts Payable - Interfund	0.00	
2120	Accounts Payable - Other	0.00	5,504.00

ACCRUED LIABILITIES

2130.2	Accrued Contingent Liability	0.00	
2135	Accrued Compensated Absences - Current Portion	986.73	
2137	Payment in Lieu of Taxes (PILOT)	0.00	
2138	Accrued Payroll	406.00	
2139	Accrued Liabilities - Other	710.03	
2140	Accrued Pension Liability (GASB 68 related)		2,102.76

DEFERRED CREDITS

2240	Tenants Prepaid Rents	0.00	
2290	Undistributed Credits	0.00	
2291	Deferred Revenue - Subsidy	92,556.00	
2292	Deferred Revenue - Other	0.00	
2293	Deferred Inflows of Resources (GASB 68 related)	7,754.00	100,310.00

NOTES PAYABLE

2299	Notes Payable Capital Borrowings - Current Portion	0.00	
2299.1	Notes Payable Operating Borrowings - Current Portion	0.00	0.00

NON-CURRENT LIABILITIES

2301	Notes Payable Capital Borrowings - Non-Current Portion	0.00	
2301.1	Notes Payable Operating Borrowings - Non-Current Portion	0.00	
2335.01	Accrued Compensated Absences - Non-Current Portion	1,165.40	
2339	Other Non-Current Liabilities	0.00	
2339.1	Accrued OPEB Liability	19,117.00	
2339.2	Accrued Pension Liability	9,227.00	29,509.40

EQUITY (NET ASSETS)

2700	Net Income (Deficit)		
2802	Invested in Capital Assets, net of Related Debt	0.00	
2805	Net Assets - Restricted	0.00	
2806	Net Assets - Unrestricted	Max % 1367.82%	164,465.83
2806.1	Net Assets - Unrestricted for OPEB		(24,141.00)
2806.2	Net Assets - Unrestricted for Pension Liability		(7,368.00)
			132,956.83

TOTAL LIABILITIES AND EQUITY 270,382.99

See Accountants' Compilation Report

LHA Name: **Salem Housing Authority**
 Program No.: **03002Mrvp/dmh**

Quarter Ending: **9/30/2025**
 Fiscal Year Ending: **9/30/2025**

ACTUAL AMOUNT (\$)

2802 Computation of Invested in Fixed Assets Net

of Depreciation and Related Debt

	Fixed Assets at End of Current Year	
(1)	(A/C 1400.2 thru 1404, 1406(not), 1407)	70,839.58
(2)	Less: Accumulated Depreciation End Of Current Year (A/C 1406)	70,839.58
(3)	Less: Capital Debt End of Current Year (A/C 2299 & 2301)	0.00
(4)	Sub Total (invested in Capital Assets End of Year)((1)-(2)-(3))	0.00
(5)	Balance in Account 2802 End of Prior Year	0.00
(6)	Prior Period Adjustments Capital Before Closing (A/C 2803 01)	0.00
(7)	Equity Transfers Capital Before Closing (A/C 2803 02)	0.00
(8)	Balance in Account 2802 Before Provision (Reduction) Invested in Capital Assets ((5)+(6)+(7))	0.00
(9)	Provision for (or Reduction of) Invested in Capital Assets ((4)-(8))	0.00

2805 Net Assets Restricted

(10)	Restricted Net Assets End of Prior Year (A/C 2805)	0.00
(11)	Restricted Grants Received (A/C 3803)	0.00
(12)	Net Assets Released From Restriction (A/C 4612)	0.00
(13)	Restricted Net Assets at End of Current Year ((10)+(11)+(12))	0.00

2806 Net Assets Unrestricted (Operating Reserve)

(14)	Unrestricted Net Assets At End of Prior Year (A/C 2806)	157,071.68								
(15)	Prior Year Adjustments Operating Before Closing (A/C 2807 01)									
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	0.00									
	0.00									
	0.00									
(16)	Equity Transfers Operating Before Closing (A/C 2807 02)									
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Description	Amount									
	0.00									
	0.00									
	0.00									
(17)	Net Income (Loss) (Line 50 of Operating Statement)	(1,155.85)								
(18)	Less: Provision for (or Reduction of) Invested Capital Assets (Line 9)	0.00								
(19)	Restricted Grants Received Included in Net Income (Line 11)	0.00								
(20)	Net Assets Released From Restriction (Line 12)	0.00								
(21)	GASB 45 Current Year Expense (A/C 4541)	8,550.00								
(22)	Unrestricted Net Assets at End of Year ((14)+(15)+(16)+(17)+(18)+(19)+(20)+(21))	164,465.83								

Fiscal Year End Forms And Certifications

Salem Housing Authority

Top 5 Compensation Form

Fiscal Year: 2025

Below please enter the compensation information requested for the Top 5 highest paid employees from all funding sources. Information must be provided at the LHA's Fiscal Year End and represents the ACTUAL compensation received for the entire year, NOT the budgeted amount. Not submitting this form will prevent the LHA from submitting their year-end operating statements.
 If the position you need to select is not available in the dropdown below, it is because your Budget "Schedule of All Positions and Salaries" does not include this position. As long as it is no later than the first (1st) day of the eleventh (11th) month of the LHA's current fiscal year, please submit a budget revision with this new position, and it will then appear in the dropdown as a position for the Top 5 Highest Compensation Form below. However, if it is past that date, please reach out to the Finance Manager at DHCD.
 * You are obligated to report all income received for the Fiscal Year - if you are unclear on where to report a certain type of income, please contact your HMS.

Position	Base Salary			Management Services Agreements and Other Management Contracts			Over Time			Other Compensation			Total Compensation	Composite Amount From Budget	% Change in Total Salary From Budget		
	State	Federal	Other	State	Federal	Other	State	Federal	Other	State	Federal	Other					
	<small>Includes salary, program administration fees (such as fees for capital projects administration, support services, etc.), and any other form of remuneration from State funds at FYE. DO NOT include management agreements here.)</small>	<small>Includes salary, program administration fees (such as fees for Section 8, etc.), and any other form of remuneration from Federal funds at FYE. DO NOT include management agreements here.</small>	<small>Includes salary, program administration fees, and any other form of remuneration other than federal or state funds. DO NOT include management agreements here.</small>	<small>Include any money from DHCD approved management services agreement with another LHA from state sources.</small>	<small>Include any money from DHCD approved management services agreement with another LHA from federal sources.</small>	<small>Include any money from DHCD approved management services agreement with another LHA from other sources.</small>	<small>Include any money from DHCD approved management services agreement with another LHA from other sources.</small>	<small>Include any money from DHCD approved management services agreement with another LHA from other sources.</small>	<small>Include any money from DHCD approved management services agreement with another LHA from other sources.</small>	<small>(For hourly staff who receive overtime pay) Please separate overtime from state, federal and other sources at FYE</small>	<small>Includes bonuses, longevity payments, and the value of use of vehicles, laptops, cell phones, and other equipment, etc. at FYE*</small>						
1 Executive Director	70,559	112,111	0	26,306	0	0	0	0	0	0	0	0	23,190	0	232,166	209,101	-0.1%
2 Maintenance Director	132,561	7,607	0	20,807	0	0	0	0	0	0	0	0	12,666	0	173,641	161,083	-0.1%
3 Assistant Executive Director	48,693	92,133	0	0	0	0	0	0	0	272	0	0	14,464	0	155,562	142,212	-1%
4 Director of Section 8	0	141,562	0	0	0	0	0	0	0	36,403	0	0	6,343	0	184,308	141,415	0.1%
5 Director of Public Housing	84,650	4,648	0	15,606	0	0	0	0	0	20,057	0	0	8,210	0	133,171	105,183	-0.3%

* Please consult the IRS for more information on how to assign value to these items.
 * Per DHCD Budget Guidelines, executive directors must not receive longevity payments from any source.
 * The percentage change calculates the variance, if any, between budgeted and actual salary, which is comprised of base salary and management services agreements / other management contracts, only.

Who Completed this form ? If Fee Accountant, Please list name.
 What information did you reference to fill in the information above?
 Comments

Fenton Ewald and Associates
Payroll Register

Housing Authority: Salem
2025

LHA Fiscal Year End: September 30,

Special Meeting
(regular/special)

Date: 11/19/2025

Time: 6:00 p.m.

Members Present:

Members Absent:

Others Present:

**Certification of Compliance with Notification Procedures for
Federal and State Lead Paint Laws**

We, the undersigned members of the Salem Housing Authority, do hereby certify that the Salem
Housing Authority is in compliance with the following:

1. Environmental Protection Agency (EPA) regulations at 40 CFR 745 Subpart F *"Disclosure of Known Lead-Based Paint and/or Lead-Based Paint Hazards Upon Sale or Lease of Residential Property,"*
2. Massachusetts Department of Public Health *Lead Poisoning Prevention and Control* regulations at 105 CMR 460.725,
3. EPA regulations at 40 CFR 745 Subpart E *"Residential Property Renovation,"* and
4. Massachusetts Division of Occupational Safety *Deleading and Lead-Safe Renovation Regulations* at 454 CMR 22.00.

and that the Salem Housing Authority is maintaining proper record-keeping related to such requirements.

Secretary, Ex Officio Cathy Sheehan

Chairperson – Aaron Paternoster

Emily Ullman

Veronica Miranda

Romell Kidd

Signed this _____ day of November 2025 _____

Certification of Top 5 Compensation Form

By completing this page, the Salem Housing Authority Board Members and Executive Director certify under pains and penalties of perjury that the Board Members have been provided with a copy of the Top 5 Compensation Form Submitted to DHCD for Salem Housing Authority for fiscal year ending 09 / 30 / 2025 and that the information presented is true, correct and complete to the best of our knowledge. The Department of Housing and Community Development will pursue any and all legal action for any false statements. False statements may be subject to criminal and/or civil penalties.

Certification of Year End Financial Statements and Tenants Accounts Receivables Data

On behalf of the Salem Housing Authority, we certify under pains and penalties of perjury that the facts and information provided in the attached year-end financial statements and tenants accounts receivables application data for the following programs 4001 and MRVP for the fiscal year ending 09 / 30 / 2025 are true, correct and complete to the best of our knowledge and that the statements fairly and accurately represent the physical condition of the development and the Housing Authority for this period. We understand that it is incumbent upon each of us to exercise appropriate care and diligence in reviewing and approving the financial statements and tenants accounts receivables application data.

Note: If ALL board members do not sign below, this form will not be accepted by DHCD and will be returned to the LHA for re-submittal.

Certify to Both	Certify to Top 5 Only	Certify to Financial Statements and Tenants Accounts Receivables Application Data Only	Decline to Certify to Both	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____
				Chairperson Aaron Paternoster
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____
				Emily Ullman
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____
				Veronica Miranda
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____
				Romell Kidd
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____

Secretary, Ex Officio – Cathy Sheehan

Signed this _____ day of _____ 2025

Fiscal Year End Certification of Preparer and Executive Director

Housing Authority: Salem LHA Fiscal Year End: 09/30/2025

Financial Statements and applicable supporting pages are submitted to the Salem Housing Authority.

Fenton Ewald & Assoc.

Prepared By	Name/Title	Date
-------------	------------	------

I declare that all facts and information contained in this Financial Statements are true, correct and complete to the best of my knowledge and belief and that the above statement fairly and accurately represents the financial position of the developments for this period. This report has been provided to and presented to the Salem Housing Authority Board of Commissioners in accordance with the provisions of Section 6A of Chapter 268 of the Massachusetts General Law.

Name	Executive Director/Title	Date
Cathy Sheehan	Executive Director	

RECEIVED BY
SALEM HOUSING
AUTHORITY

Emily P. Achtenberg
Housing Policy & Development Consultant
47 Halifax Street
Boston, MA 02130
617-365-3775
ejpa@aol.com

2025 OCT 16 AM 9:49

October 15, 2025

Cathy Hoog
Executive Director
Salem Housing Authority
27 Charter Street
Salem, MA 01970

Re: Development Consulting Services, First Street – Price Proposal

Fee for services: \$220 per hour, subject to annual increase. Payable within 30 days of monthly invoice. Deferral of fees immediately prior to closing of the redevelopment project may be considered. As a sole proprietor, I am not able to offer additional deferrals.

This is not a fixed price proposal, due to the significant number of variables involved. Level of consultant effort will depend on such factors as: the number/ responsiveness of developer proposals received; extent of negotiations required; SHA staff capacity; and for the redevelopment project itself, allocation of developer/ SHA responsibilities, nature of the redevelopment program, and number of funding sources/ applications required.

Sincerely yours,



Emily Achtenberg

Emily P. Achtenberg
Housing Policy & Development Consultant
47 Halifax Street
Boston, MA 02130
617-365-3775
ejpa@aol.com

RECEIVED BY:
SALEM HOUSING
AUTHORITY

2025 OCT 16 AM 9:49

October 15, 2025

Cathy Hoog
Executive Director
Salem Housing Authority
27 Charter Street
Salem, MA 01970

Re: Development Consulting Services, First Street; Proposal & Qualifications

Dear Ms. Hoog:

I am pleased to submit this proposal to provide development consulting services to the Salem Housing Authority in conjunction with the proposed redevelopment of SHA's First Street parcel.

As detailed in the enclosed resume, I have been working in the field of subsidized housing preservation and development for more than 45 years. I have been involved in transactions utilizing the full range of affordable housing financing tools, including tax-exempt bonds, low income housing tax credits, state and local gap financing programs, and various forms of rental assistance. In this capacity, I have assisted a wide range of non-profit organizations and state and local public agencies in Massachusetts in developing innovative ways to preserve, recapitalize, and/or construct new affordable housing resources.

Experience and Qualifications

The following recent consulting engagements demonstrate my relevant experience and qualifications.

- **Broughton Terrace, Marblehead.** I am currently advising the Marblehead Housing Authority on the redevelopment of Broughton Terrace, a 62-unit state-assisted family public housing project. To date, I have assisted MHA in developing an RFP to procure a private development partner, in evaluating developer proposals, in selecting Winn Companies as its development partner, and in negotiating a detailed Term Sheet establishing MHA as co-developer and co-owner.

- **Town of Needham.** I recently assisted the Town of Needham in analyzing the feasibility of developer proposals for CPA funding, including two public housing

redevelopment projects proposed by the Needham Housing Authority (Linden Street and Seabed's Way), and a proposed new construction project for persons with disabilities.

- **Leefort Terrace, Salem.** I recently advised the Salem Housing Authority in planning for the redevelopment of Leefort Terrace, a 50-unit state-aided public housing project, and its conversion into a 124-unit affordable housing development, in partnership with Beacon Communities. Funding sources included DHCD HILAP and soft debt, local TIF, ARPA, CPA, and HOME contributions, and private debt/ tax credit equity financing. I assisted SHA with developer selection, proforma and feasibility analysis, relocation planning, negotiation of developer agreements, and ongoing participation in the development process.

- **Innes Apartments, Chelsea.** I provided similar consulting services to the Chelsea Housing Authority in planning for the redevelopment of Innes Apartments, a 96-unit state-aided public housing project, and its conversion into a 330-unit mixed income development, in partnership with Joseph J. Corcoran/ John M. Corcoran. Funding sources included DHCD PEHO and Massworks grants, Chapter 40R, a local TIF contribution, and private debt/ tax credit equity financing. I assisted CHA with RFP preparation, developer proposal evaluation, developer selection, ongoing feasibility analysis, and negotiation of development agreements and closing documents.

- **Governor Prence Motel, Orleans.** I recently assisted the Town of Orleans (Affordable Housing Trust and Town Manager) in analyzing the financial feasibility of two affordable housing proposals for this 5.5 acre site (rental and homeownership).

- **Lawrence Road, Wellfleet.** I provided similar assistance to the Town of Wellfleet in analyzing the financial feasibility of three developer proposals for Lawrence Road, a 46-unit affordable housing site.

- **City of Cambridge.** For 20 years, I advised the City of Cambridge in its successful efforts to preserve a large inventory of expiring use properties, through the strategic provision of soft loans and rental subsidies to non-profit and for-profit developers and owners. Most recently, this included developing a unique strategy to preserve Fresh Pond Apartments, a 504-unit expiring use development, by combining City financing with HUD Section 8 Enhanced Vouchers to create an affordable rent structure for both subsidized and non-subsidized tenants.

Proposed Approach

My overall priorities for the project will be to ensure that the development plan is both feasible and responsible to community needs, and that all affordable units are maintained in perpetuity. In addition, I am committed to assisting the SHA in negotiating a strong role for itself in the future development and, potentially, ownership of the project, in addition to a fair share of project benefits, similar to what has been accomplished at Broughton Terrace.

My main question is whether this could also be an opportunity to upgrade (or redevelop, as needed) the adjacent public housing development, which could enhance eligibility for PHI funding. Additionally, the availability of Faircloth subsidies from one of SHA's federal developments would increase the site's appeal to developers and greatly enhance feasibility in this era of scarce subsidy resources.

In addition to Broughton Terrace, I am currently serving on a commission appointed by the Town of Wellfleet to redevelop a 21.5 acre site as mixed-income housing. I am available to begin work on this project immediately.

Thank you for your consideration, and I look forward to hearing from you.

Sincerely yours,



Emily Achtenberg

REFERENCES

Albert Ewing
Executive Director (former)
Chelsea Housing Authority
617-905-4643
aewing90@hotmail.com

Cecilia Simchak
Assistant Director of Finance
Town of Needham
781-455-7500 x 71208
csimchak@needhamma.gov

Kimberly Newman
Town Manager
Town of Orleans
508-240-3700 ext. 2415
knewman@townorleans.ma.us

Attachment A

Certificate of Non-Collusion

The undersigned certifies under penalties of perjury that this bid or proposal has been made and submitted in good faith and without collusion or fraud with any other person. As used in this certification, the word "person" shall mean any natural person, business, partnership, corporation, union, committee, club, or other organization, entity, or group of individuals.

Emily Achtenberg *10-15-25*

Signature of Individual Submitting Bid or Proposal
and Date

Emily Achtenberg

Name of Business

10-15-25

Date

Attachment B

Tax Compliance Certification

Pursuant to M.F.L. c. 62C, SS49A, I certify under the penalties of perjury that, to the best of my knowledge and belief, I am in compliance with all laws of the Commonwealth relating to taxes, reporting of employees and contractors, and withholding and remitting child support.

Emily Achtenberg

Signature of Individual Submitting Bid or Proposal

Emily Achtenberg

Name of Business

10-15-25

Date

RECEIVED BY:
SALEM HOUSING
AUTHORITY

Emily P. Achtenberg
Housing Policy & Development Consultant
47 Halifax Street
Boston, MA 02130
617-365-3775
ejpa@aol.com

2025 OCT 16 AM 9:49

Emily P. Achtenberg is a Boston-based housing consultant specializing in the preservation of federally- and state-assisted housing. She has more than 40 years of experience in affordable housing preservation transactions and related research, policy development, program evaluation, advocacy, technical assistance, and training. She has assisted non-profit, resident, and government organizations in acquiring or recapitalizing more than 5,000 affordable units threatened with expiring use restrictions and/or subsidy contracts. She also consults with local Housing Authorities on the preservation and/or redevelopment of at-risk public housing developments, and with municipalities seeking to develop new affordable housing opportunities.

EXPERIENCE

☐ PHA & Local Government Assistance

2024- . Currently assisting the Marblehead Housing Authority in planning for the redevelopment of Broughton Terrace, a 62-unit state-aided family public housing project, and its conversion to affordable or mixed-income housing with additional units. Advised MHA in drafting RFP for developer selection, in selecting Winn Companies as its development partner, and in negotiating a detailed Term Sheet establishing MHA as co-developer.

2024-5, 2023-4. Assisted the Town of Needham in analyzing the feasibility of developer proposals for Community Preservation Act (CPA) funding, including: the Needham Housing Authority's proposed redevelopment of Linden Street, a 72-unit state-aided public housing project, and Seabeds Way, a 40-unit federal project; and the Charles River Center's proposed new construction of an integrated development for persons with disabilities.

2023-4. Advised the Town of Orleans in evaluating developer proposals and in electing a developer for redevelopment of the Governor Prence motel site as affordable and mixed-income housing (77 units, rental and homeownership).

2022- . Member of Town of Wellfleet-appointed committee responsible for planning for the redevelopment of Maurice's Campground, a 21.5 acre site, as affordable and attainable housing. Helped to develop a Master Planning RFP, select a consultant team, and oversee production of a Master Plan for the site. Currently overseeing development of a zoning overlay district.

2022, 2021 - Assisted the Town of Wellfleet in evaluating the financial feasibility of developer proposals for the Lawrence Road affordable housing site (46 units).

2020-2024 Assisted Salem Housing Authority in planning for the redevelopment of Leefort Terrace, a 50-unit state-aided public housing project, and its conversion into a 124-unit affordable housing development (in partnership with Beacon Communities). Sources include DHCD HILAPP grant and soft debt, local TIF, ARPA, and HOME contributions, and private debt/ tax credit equity financing.

2016-2022. Assisted Chelsea Housing Authority in planning for the redevelopment of Innes Apartments, a 96-unit state-aided public housing project, and its conversion into a 330-unit mixed income development (in partnership with Joseph J. Corcoran/ John M. Corcoran). Funding includes DHCD PEHO grant, Massworks, Ch. 40R, local TIF contribution, and private debt/ tax credit equity financing.

1998-2022. City of Cambridge. Provided ongoing consulting services to the Community Development Department in preserving the City's inventory of expiring use projects, including negotiations with owners and developers and structuring City financing and rental subsidies to maximize long-term preservation. Most recently (2015-2022), assisted the City in developing and implementing a unique strategy to preserve Fresh Pond Apartments, a 504-unit mixed-income development, by combining City soft debt with HUD Section 8 Enhanced Vouchers to create a tiered rent structure and extended rent phase-in plan compatible with the owner's refinancing program. Other projects include: Briston Arms, Putnam Square Apts, Cambridge Court, Harwell Homes, Church Corner, Walden Square Apts. and 929 House.

2003-7: Town of Andover. Strategic planning and assistance to preserve 3 expiring tax credit projects (Brookside Estates, Andover Commons, Riverview Commons).

2001-6: City of Somerville. Facilitated preservation transactions at: Cobble Hill, 219 Pearl St., Mt. Vernon St, and 110 Walnut St.

1999-2001: City of Newton. Analysis of New Falls Apts, Peirce House.

2001: Assisted Town of Brookline in analyzing preservation options for 3 Chapter 121A projects undergoing ownership transfer (100 Centre, 1550 Beacon, 120 Centre Ct.)

2000: Prepared feasibility analysis for Boston Housing Authority for disposition of West Concord Apts, acquired from HUD.

□ Development Projects: Subsidized Housing Preservation

2020-21. *Mohawk Forest Apartments, N. Adams, MA*. Assisted the Caleb Foundation with Section 8 contract renewal and Ch. 40T transfer process in conjunction with project refinancing (190 units).

2019-21. *Westland Ave. Apartments (Boston, MA)*. Assisted Fenway CDC with Year 15

buyout of tax credit investors (96 units).

2016-20 *Burbank Gardens (Boston, MA)*. Assisted Fenway CDC with first non-profit acquisition/ preservation of an at-risk 13A property under Ch. 40T. Acquisition/ permanent financing from Masshousing, DHCD, City of Boston, LIHTC, and state tax credits (52 units).

2013-4: *Louis Barrett Apts (Lynn, MA)*. Preservation of maturing mortgage property under RAD, with MassHousing bridge loan refinancing, IRP decoupling, conversion to project-based vouchers through Cambridge Housing Authority (CHA) (145 units).

2013-2014: *Rindge Apts. (Cambridge, MA)*: For Just-A-Start, preservation of non-profit LIHPRHA project through prepayment and conversion to project-based vouchers under Moving to Work, with CHA (273 units).

2011-2: *Norstin Apts. (Cambridge, MA)*. For Homeowner's Rehab, Inc., acquisition of maturing mortgage property, conversion to project-based vouchers under Moving-To-Work, with CHA (32 units).

2011: *Chapman Arms (Cambridge, MA)*. For Homeowner's Rehab, Inc., first acquisition under Ch. 40T of at-risk expiring subsidy project, with CEDAC Preservation Loan Fund (25 units).

2011: *Northgate/ Greenfield Apts (Burlington, VT)*. Refinancing of Title II preservation project with tax-exempt bonds, S8 Mark Up to Market, and restructured Flexible Subsidy Loan (336 units).

2009-11: *Inman/ CAST2 Apts. (Cambridge, MA)*. For Homeowner's Rehab, Inc., acquisition/rehab combining a S. 236 and a S.8 property, with tax-exempt bonds, tax credits, IRP decoupling, and precedent-setting conversion of EVs to PBVs through CHA (125 units).

2007-9: *Washington Columbia II Apts (Boston, MA)*. For Codman Square CDC, mark-to-market debt restructuring (175 units).

2007-8: *New Lithgow Apts. (Boston, MA)*. For Codman Square CDC, refinancing/ recapitalization of expiring tax credit project with tax-exempt bonds and tax credits (31 units).

2005-8: *La Concha Apartments (Boston, MA)*. For Nuestra Comunidad, mark-to-market debt restructuring/ recapitalization; 97 units.

2003-7: *Angela Westover House (Jamaica Plain, MA)*. For Jamaica Plain NDC, S. 202/S8 refinancing/ recapitalization; 11 units.

2004-6: *New North Canal Apts. (Lowell, MA)*. For Coalition For a Better Acre, refinancing/ recapitalization of S8 project previously acquired from HUD; tax-exempt financing, tax credits, investor charitable contribution; 267 units.

2003-5: *Washington Columbia I (Dorchester, MA)*. For Codman Square CDC, mark-to-market debt restructuring/ recapitalization; 151 units.

2000-5: *Westland Ave. Apts. (Boston, MA)*. For Fenway CDC, Acquisition/ rehab of mixed-income S8 project; tax-exempt financing, tax credits, state/local funds; 96 units.

2001-5: *Morville House (Boston, MA)*. Refinancing/ recapitalization of existing S236/8 property with 30-unit expansion; tax-exempt financing and tax credits; 175 units.

2001-2: *CAST Apts. (Cambridge, MA)*: For Homeowner's Rehab, Inc., acquisition/ substantial rehab of expired S. 236 property; taxable financing, 9% credits, state/local funds; 42 units.

2000-4: *Cathedral Hill Apts. (Springfield, MA)*: mark-to-market debt restructuring/ recapitalization of existing S236/8 property and subsequent sale to tenant-involved entity; 48 units.

1998-2000: *Pondview Apts. (Boston, MA)*: For Jamaica Plain NDC, acquisition/ substantial rehab of existing S236/8 property with IRP retention, new financing, tax credits, state/ local funds; 60 units.

□ Other Technical Assistance

2013-4, 2009-11. Assisted Urban Edge with HUD-related aspects of Walnut-Washington Apts. recapitalization, including Mark Up to Market and negotiation of HUD deed restriction.

2009-11: Assisted Allen Park Tenants Association with investor exit, mortgage prepayment, contract renewal, and recapitalization planning.

2007: Assisted Madison Park Development Corp. in analyzing and structuring acquisition of Schoolhouse Properties from HUD.

2006-8. Assisted Allston Brighton CDC with refinancing/ recapitalization of Ashford Street SRO, expiring tax credit project with project-based certificates.

2006: Assisted West Side Federation for Senior/ Supportive Housing (NYC) in developing a neighborhood database and risk assessment for at-risk subsidized projects.

2003: Advised Caleb Foundation re rent structuring for tax credit project with project-based and enhanced vouchers (Tall Pines).

2003: Prepared feasibility analysis for HAP, Inc. re potential purchase of Meadowbrook Apts.

2001: Prepared detailed assessment of subsidized projects for Allston-Brighton CDC & Harvard University, including purchase feasibility analysis.

□ Policy and Program Development/ Program Evaluation

2014-15 - Prepared detailed report assessing Chapter 40T program experience (expiring use preservation), for CEDAC and MassHousing ("Chapter 40T at 5").

2014 - Prepared case study of MA experience with project-basing Tenant Protection Vouchers through Moving to Work, for LISC.

2014- 6: Member of DHCD/ MassHousing 13A Working Group.

2009-present: Member of Governor-appointed Preservation Advisory Group, advising state on preservation policy and Chapter 40T implementation.

2012. Prepared analysis of maturing subsidized mortgage inventory for CEDAC.

2007-9: Member of CHAPA committee responsible for developing Chapter 40T.

2005 - Prepared assessment of how state bond funds have been used for preservation, including mini-case studies, for CHAPA.

□ Training

Boston Bar Association Containing Legal Education. *June 2013.* Participated in design and delivery of preservation workshop for affordable housing practitioners.

HUD/ TDP Partners in Housing. *June - October 2012.* Participated in design and delivery of preservation training curriculum for affordable housing practitioners (basic and advanced courses), sponsored by HUD's Office of Multifamily Housing.

LISC Preservation Training Institute. *December 2006.* Participated in training for LISC field staff and related organizations.

Rockport Mortgage Co. *2006.* Developed and implemented preservation training course for lenders.

LISC Experts On-Line. *2001.* Developed and delivered 4-part on-line training curriculum for preservation practitioners and advocates, including live presentations

and written materials archived on LISC website.

□ **Other Significant Past Projects**

Linkage. 1985: Developed a housing linkage proposal for the City of Hartford (CT)/ Linkage Task Force, including assessment of programs in other cities. 1983: Member of Mayor's Linkage Advisory Group, City of Boston.

Public Housing. 1982-5: Assisted Boston Housing Authority and Columbia Point Community Housing Task Force in planning for conversion of a 1500-unit public housing project to mixed-income housing, including developer selection and assistance in drafting multiparty MOU.

HUD Property Disposition. 1978-81: At CHAPA, co-directed a Demonstration Program to promote resident participation in the management, disposition, and ownership of HUD-foreclosed multifamily projects in Boston; evaluated program results for HUD.

MassHousing. 1976, 1973: Member of consultant teams evaluating the viability of selected mixed-income housing developments.

SELECTED PUBLICATIONS & REPORTS

Chapter 40T at 5: A Retrospective Assessment of Massachusetts' Expiring Use Preservation Law, CEDAC/Masshousing, March 2015.

Maturing Subsidized Mortgages: The Next Frontier of the Expiring Use Crisis, Center for Social Policy/ UMass Boston, April 2009.

"Federally-Assisted Housing in Conflict: Privatization or Preservation?" in *A Right to Housing*, Rachel Bratt, Chester Hartman, and Michael Stone, eds., Temple U Press, 2005.

Recapitalizing Affordable Housing: A Handbook for Nonprofit Owners, Local Initiatives Support Corporation (contributing author), 2005.

Smart Preservation: Preserving At-Risk Subsidized Housing with State Bond Funds, Citizens Housing and Planning Association, June 2005.

Stemming the Tide: A Handbook on Preserving Subsidized Multifamily Housing, September 2002, Local Initiatives Support Corporation.

Preserving Affordable Housing: On the Road to Success, June 1995 (with ICF Incorporated); 300+ pages. For U.S. Dept. of Housing & Urban Development, Office of Housing.

Partners in Preservation: A Guide to the Title VI Program, December 1994 (with ICF

Incorporated); 300+ pages. For U.S. Dept. of Housing & Urban Development, Office of Housing.

Preserving Expiring Use Restriction Projects: A Handbook for Tenant Advocates, Non-Profit Groups, & Public Officials in Mass., July 1992 (300+ pages). For Citizens Housing and Planning Association and the Mass. Community Economic Development Assistance Corp.

"Subsidized Housing At Risk: The Social Costs of Private Ownership," in *Housing Issues of the 1990s*, Sara Rosenberry and Chester Hartman, eds., Praeger: 1989.

EMPLOYMENT HISTORY

- 1981- Housing Policy and Development Consultant (sole proprietor).
- 1983-4 Tufts University, Dept. of Urban & Environmental Policy
MIT, Dept. of Urban Studies & Planning; Visiting Lecturer
- 1978-81 Citizens Housing and Planning Association, Inc.
Boston HUD Demonstration Project: co-director
- 1977-8 Greater Boston Community Development, Inc.
Distressed properties development specialist
- 1975-6 Boston Community School: director, Tenants Education & Training Project
- 1969-75 Urban Planning Aid, Inc.: housing research specialist
- 1966-9 Philadelphia Housing Association, Inc.: housing research technician

PROFESSIONAL AFFILIATIONS

National Low Income Housing Coalition: Board of Directors, 1985 - 1995
 Citizens Housing and Planning Association (Boston, MA): former Member of Policy Leadership Council and Board of Directors
 Planners Network - founding member

EDUCATION

- 1970 M.C.P., MIT Department of Urban Studies and Planning; Lasker fellow.
- 1965 B.A. magna cum laude, Brandeis University, Politics; Phi Beta Kappa.

DEVELOPMENT PROJECTS COMPLETED

BURBANK APTS: Boston, MA; 2016-20
 Sponsor: Fenway CDC

Acquisition/ preservation of expiring mixed-income 13A property under Chapter 40T; 52 units. TDC = \$21 million. Financing: MassHousing construction/ perm, bridge, & soft loans (Preservation & Workforce Housing); City of Boston; DHCD CIPF; LIHTC; state tax credits; S8 project-based vouchers & MRVP.

LOUIS BARETT APTS: Lynn, MA; 2013-4

Sponsor: Jeffrey Gouchberg/ Harbor Companies

Refinancing/ preservation of maturing mortgage property (S. 236); 145 units. TDC = 1.9 million. Financing: MassHousing bridge loan/ IRP decoupling, with conversion of enhanced to project-based vouchers under RAD, through CHA and LHAND.

NORSTIN APTS: Cambridge, MA; 2011-2

Sponsor: Just A Start Corp.

Acquisition of maturing mortgage property (S. 236); 32 units. TDC = \$9 million. Financing: CEDAC Preservation Loan Fund & City of Cambridge, with conversion of enhanced to project-based vouchers under Moving-To-Work, through CHA.

CHAPMAN ARMS: Cambridge, MA; 2011

Sponsor: Homeowner's Rehab, Inc.

First acquisition under Ch. 40T Expiring Use Preservation Law, of mixed-income, mixed-use expiring S. 8 property in Harvard Sq.; 50 units. TDC = \$19.6 million. Financing: CEDAC Preservation Loan Fund & City of Cambridge, with conversion of enhanced to project-based vouchers under Moving-To-Work through CHA.

NEW NORTHGATE APTS: Burlington, VT; 2011

Sponsor: Northgate Resident Ownership Committee, Inc.

Refinancing of Title II preservation property (336 units) with tax-exempt bonds, S.8 Mark Up to Market, and restructured HUD Flexible Subsidy loan. TDC = \$25.9 million.

INMAN-CAST 2 APTS: Cambridge, MA; 2009-11

Sponsor: Homeowner's Rehab, Inc.

Acquisition/ rehab combining an existing S. 236 property and a S8 property; 125 units. TDC = \$33M. Financing: tax-exempt bonds with IRP decoupling; 4% tax credits; City deferred loan; Section 8 Mark Up to Market; and first conversion of enhanced to project-based vouchers under Moving To Work, through CHA.

WASHINGTON COLUMBIA II APTS: Dorchester, MA: 2007-9

Sponsor: Codman Square Neighborhood Development Corp.

M2M debt restructuring/recapitalization of existing S8 project; 175 units; 223a(7). TDC = \$12.4M.

NEW LITHGOW APTS: Dorchester, MA; 2007-8

Sponsor: Codman Square NDC

Refinancing/ recapitalization of 31 unit expiring tax credit project. Financing: tax-exempt

bonds; 4% tax credits; city/ state gap financing; SHARP restructuring. TDC = \$6.3 million.

LA CONCHA APTS: Boston, MA; 2005-8

Sponsor: Nuestra Comunidad Development Corp.

M2M debt restructuring/ recapitalization of existing S8 project; 97 units; 223a(7). TDC = \$6.8M.

ANGELA WESTOVER HOUSE: Jamaica Plain, MA 2003-7

Sponsor: Jamaica Plain NDC

Refinancing/ recapitalization of 11-unit S8/202 project. TDC= \$1M.

NEW NORTH CANAL APTS: Lowell, MA; 2004-6

Sponsor: Coalition for a Better Acre, Inc.

Refinancing/ recapitalization of partially-assisted S8 project originally acquired from HUD. 267 units. Financing: MDFA/ MHP tax-exempt bonds, purchased by BankNorth, with 4% credits. TDC = \$33M.

WASHINGTON COLUMBIA I: Dorchester, MA; 2003-5

Sponsor: Codman Square NDC

M2M debt restructuring/ recapitalization of existing S8 project; 151 units; 223a(7). TDC = \$8.6M.

WESTLAND AVE. APTS: Boston, MA; 2001-2005

Sponsor: Fenway CDC

Acquisition/ rehab of existing mixed-income project with partial S8; 96 units. Financing: MHFA tax-exempt bonds with 4% credits; DHCD, DND, BRA, and City "tax" loans; S8 mark up to market; renegotiated Ch. 121A contract. TDC = \$21.5M.

MORVILLE HOUSE; Boston, MA; 2001-5

Sponsor: Episcopal City Mission

Refinancing/ recapitalization of existing HUD 236/8 project (145 units), plus 30-unit expansion. Financing: MHP/Fleet/MDFA tax-exempt bonds with 4% tax credits; S8 mark-up to market; renegotiated Chapter 121A contract. TDC = \$30M.

CATHEDRAL HILL APTS: Springfield, MA; 2000-4

Sponsor: Springfield Diocese Housing, Inc.

M2M debt restructuring/ recapitalization of existing S236/8 project and subsequent sale to residents; 48 units. TDC = \$1.5M.

CAST 1 APTS: Cambridge, MA; 2001-2

Sponsor: Homeowner's Rehab., Inc.

Acquisition/ substantial rehab of existing MHFA S236 project at end of mortgage term; 42 units. Financing: MHP loan. 9% tax credits, DHCD and City funds, project-based and enhanced vouchers. TDC = \$9.7M.

PONDVIEW APTS; Boston, MA; 1998- 2000

Sponsor: Jamaica Plain NDC

Acquisition/ substantial rehab of existing HUD 236/8 project; 60 units. Financing: MHP loan with S. 236(b) decoupling; 9% credits; DHCD and City funds. TDC = \$9.5M

MOHAWK FOREST APTS.; North Adams, MA; 1999

Sponsor: The Caleb Foundation

Acquisition/ mod rehab of existing HUD 236 project; 190 units. Financing: MHFA with S. 236(b) decoupling; 4% credits, DHCD, FHLBB. TDC = \$8.8M. Responsible for processing decoupling package with HUD; assistance in structuring debt and secondary financing.

HOLYOKE FARMS; Holyoke, MA; 1999

Sponsor: Maloney Properties, Inc.

Acquisition/ mod rehab of existing HUD 221d3 BMIR project; 225 units. Financing: MHFA tax-exempt bonds, 4% credits, enhanced vouchers. TDC = \$9.7M. Assisted with MHFA processing, HUD mortgage prepayment and voucher approvals, negotiations with private developer partner.

ST. JOSEPH'S COOPERATIVE; Boston, MA; 1997-2000; 2005

Sponsor: St. Joseph's Community, Inc./ Cornu Management, Inc.

Recapitalization and additional financing of existing HUD 221d3 BMIR project; 137 units. Financing: DHCD, City of Boston, FHLBB; renegotiated 121A tax contract, with new share loan fund and S8 mark-up to budget.

808 MEMORIAL DRIVE; Cambridge, MA; 1992-7

Sponsor: Homeowners Rehab, Inc.

Acquisition/ substantial rehab of existing MHFA partially-assisted 236 project; 301 units, mixed-income/ mixed use; Financing: HUD Preservation Grant; 9% tax credits; MHFA mortgage increase; DHCD, City, FHLBB. TDC = \$40M. Responsible for the HUD preservation transaction, structuring debt and secondary financing, renegotiating Ch. 121A tax contract.

COMMONWEALTH & GLENVILLE APTS; Boston, MA; 1988 - 1997

Sponsor: Allston-Brighton CDC & Commonwealth Tenant Council

Acquisition/ substantial rehab of two existing HUD 236 projects; 235 units. TDC = \$20M. Financing: HUD Preservation Grants with DHCD, City, FHLBB.

SPRING MEADOW APARTMENTS; Springfield, MA; 1991-7

Sponsor: Spring Meadow Association of Responsible Tenants, Inc.

Acquisition/ substantial rehab of existing HUD 236 project; 270 units. TDC = \$21M. Financing: HUD Preservation Grant with DHCD, City, and FHLBB.

PHIL C. BRADLEY HOUSING PARTNERSHIP; Boston, MA; 1989-1997

Sponsor: Inquilinos Boricuas en Accion & Shawmut-Tremont Tenant Council
 Acquisition/ substantial rehab of existing HUD 236 project; 71 units. TDC = \$5M.
 Financing: HUD Preservation Grant.

AMESBURY GARDENS; Lawrence, MA; 1992-6

Sponsor: Amesbury Gardens Tenant Association, Inc.
 Acquisition/ substantial rehab of existing HUD 236 project; 160 units; acquisition and substantial rehabilitation. TDC = \$8.7M. Financing: HUD Preservation Grant, DHCD, City, FHLBB, with renegotiated Ch. 121A tax contract.

CLARENDON HILL TOWERS, Somerville, MA; 1988-90

Sponsor: Clarendon Hill Towers Tenant Association, Inc.
 Acquisition/rehab of existing HUD 221d3 BMIR project; 500 units. TDC = \$30M.
 Financing: tax-exempt bonds (TELLER); HUD Section 241(f) second mortgage; HUD Flexible Subsidy; DHCD public housing funds; weatherization grants; operating subsidy loan (RHDAL), with renegotiated Ch. 121A tax contract.

NORTHGATE/ GREENFIELD APARTMENTS, Burlington, VT; 1988-89; 2004.

Sponsor: Northgate Housing, Inc.
 Acquisition/ substantial rehab of two existing HUD 221d3 BMIR projects, with two-stage purchase through VHFA. 336 units; TDC = \$20M. Financing: VHFA tax-exempt bonds; HUD Flexible Subsidy; tax credits; state Housing Trust Fund loans. Responsible for financial/ regulatory analysis, rent structuring, HUD processing, coordination with debt and equity financing. Subsequent assistance with S8 mark up to budget. (See also New Northgate Apts., above.)

NORTH CANAL APARTMENTS; Lowell, MA; 1984-9

Sponsor: Coalition for a Better Acre, Inc.
 Acquisition/ substantial rehab of former 221d3 BMIR project foreclosed by HUD; 267 units; TDC = \$20M. Financing: local bank consortium, 9% credits, state and federal rental subsidies. Responsible for structuring and processing all HUD-related aspects of the transaction. (See also New North Canal Apts., above.)

METHUNION MANOR APARTMENTS; Boston, MA; 1981-6

Sponsor: Methunion Manor Cooperative Corporation, Inc.
 Acquisition/ mod rehab of former 221d3 project foreclosed by HUD, converted to limited-equity coop ownership. 150 units; TDC = \$800,000. Financing: National Cooperative Bank; S8.

RFP Register

Proposals Received for Legal Services

	<u>Date</u>	<u>Time</u>	<u>Bidder</u>
1.	<u>10-27-25</u>	<u>10:30 am</u>	<u>Flynn Law Group</u>
2.	<u>10-28-25</u>	<u>9:24 am</u>	<u>Casey Lundregan Burns Atty at Law</u>
3.	<u> </u>	<u> </u>	<u> </u>
4.	<u> </u>	<u> </u>	<u> </u>
5.	<u> </u>	<u> </u>	<u> </u>
6.	<u> </u>	<u> </u>	<u> </u>
7.	<u> </u>	<u> </u>	<u> </u>
8.	<u> </u>	<u> </u>	<u> </u>
9.	<u> </u>	<u> </u>	<u> </u>
10.	<u> </u>	<u> </u>	<u> </u>

Karina Tejada

1 Artichoke Terrace, Newburyport MA 01950 978-702-6580

Ktejadah1@gmail.com

Objectives

Experience manager with over 15 years of service in high pressure environments within the hospitality and automobile tech industry. I am looking to be part and collaborate with a team to achieve the company goals.

Experience

Date of Employment: 5/15/2022- 8/20/2025

TSD Mobility Solutions

North Andover MA

AR Specialist/Account services.

- Inbound and outbound calls.
- Provide invoice detail information and fees.
- Process credit card payment and register checks.
- Respond to chargeback.
- Provide support to sales on client questions regarding services and contract terms.
- In charge of corporate collections for Nissan, Rivian, EHI and all international accounts.
- Create orders to modify invoice error and account profile information.

Experience

Date of Employment : 11/20/2018 - 05/13/2022.

Spire Hospitality

Peabody, MA

Regional Accounting & HR Manager

Karina Tejada

1 Artichoke Terrace, Newburyport MA 01950 978-702-6580

Ktejadah1@gmail.com

- Oversee daily accounting responsibilities for 3 properties.
- Manage accounts receivable keeping 90% of aging under 60 days.
- Process invoices using the IBuyEfficient system.
- Prepare journal entries and reclass gl.
- Cash management deposits.
- Responsible for chargeback response using BOA and Amex website.
- Manage expense forecasts working with managers and GM to achieve profitability goals.
- HR responsibilities consisted of, maintaining employee files, completion of the new hire process, assisting in disciplinary actions ensuring all company policies are followed.
- Biweekly payroll.
- Scheduling and initiative on creating cross training during the pandemic allowing the hotel to maximize and utilize staff in different departments.
- Assist employees during the benefit open enrollment period.

Experience

Date of Employment : 6/1/2012 to 11/20/2018
Midland Hotel Corporation
Peabody, MA

Accounting & HR Manager

- Oversee daily accounting responsibilities including: accounts receivable, accounts payable, journal entries, deposits and payroll.
- Prepare the daily, weekly, and monthly reports for the corporate controller and general manager. Labor & overtime, sales, aging and accounts receivable reports
- HR responsibilities consisted of, maintaining employee files, completion of the new hire process, assisting in disciplinary actions, and ensuring all company policies are followed.

Experience

Date of Employment : 6/1/2012
Midland Hotel Corporation
Peabody, MA

Executive Housekeeper

- Responsible for the daily operations of the Housekeeping department of a 180 room full service hotel. Overseeing a staff of 20+ employees.
- Managed the department budget while ensuring a high level of guest satisfaction and employee low turnover.

Karina Tejada

1 Artichoke Terrace, Newburyport MA 01950 978-702-6580

Ktejadah1@gmail.com

- Planned and executed staff training with required continuous education. I was involved in the new hire process and monthly department meetings.

Academic Education

Dates of Attendance : 1999 To 2003
Pontificia University Madre Y Maestra Dominican Republic
BS, Hotel Management

Professional Education

Dates of Attendance : 2015
North Shore Community College
Accounting Transfer Program

Skills & Qualifications

- Bi-lingual English-Spanish
- 15 years staff management.
- Customer Service experience
- 8 years experience with accounts receivable, payroll and human resources
- Profitsword & M3 hospitality accounting software, AX and Power.
- payroll systems: Ascentis, ADP, UKG, Paychex
- Opera PMS and Micros POS systems
- Microsoft Office, Word, Excel, Outlook, Powerpoint

References

References are available on requests



Wage Match Guidelines for State Housing Programs

The Salem Housing Authority will comply with all applicable laws and regulations relating to confidentiality and privacy, including but not limited to M.G.L.c.62E and c.66A and 760 C.M.R. 6.00 and 801 CMR 3.00 when requesting and receiving information through the wage match system.

The following set of guidelines will be used when handling wage match information:

1. Employees who will be authorized to request and receive information provided through the Wage Match system will be Maureen R. Thomas, Director of Public Housing, Joshua Bocko, Assistant Director of Public Housing, Alexandra Rodriguez, Property Manager and Lilly Rojas, Property Manager.
2. The Salem Housing Authority assures protection of privacy and confidentiality including but not limited to access to computer by the Director of Public Housing and Property Managers via private password and maintaining printed materials and storing of information in separate filing cabinets.
3. Information received from the Wage Match system will be used solely to verify income and assets of households in the Salem Housing Authority state housing programs.
4. The Salem Housing Authority will notify DHCD immediately both orally and in writing if any personal data is improperly used or accessed and cooperate with DHCD to enjoin or prevent misuse of, regain possession of, and otherwise protect the data.

Adopted by the Salem Housing Authority Board of Directors on: _____

File: ac-wagematchguidelines

EXECUTIVE DIRECTOR/BOARD APPROVAL
(SIGN AND RETURN THIS DOCUMENT TO DHCD, ALONG WITH A LIST OF ALL EMPLOYEES
AUTHORIZED TO REQUEST AND RECEIVE INFORMATION PROVIDED THROUGH WAGE MATCH)

Executive Director/Board Approval

Your signature below will indicate that you have read and thoroughly understand the contents of Public Housing Notice 2019-16. **It will also indicate that all authorized employees at your housing authority have read and signed the attached “Acknowledgement Regarding Confidentiality of the Department of Revenue’s Information & DOR Disclosure and Security Training for Safeguarding Information,” and that your authority has these signed acknowledgements on file. Please note that the Acknowledgements include a summary of the law and other information.**

After Board Approval, please have the Executive Director, as well as the Chairperson of the Housing Authority Board sign on the appropriate lines below, **and scan/return to DHCD, within forty-five (45) days of the date of this Public Housing Notice (PHN) to Michael Chow, Auditor, Bureau of Housing Management, at Michael.Chow@Mass.Gov, along with a list of all employees that are authorized to request and receive information provided through Wage Match.**

If you have any questions about the Wage Match System, please call Michael Chow of the Bureau of Housing Management at (617) 573-1201.

Cathy Hoog, Executive Director

Salem Housing Authority

(Name of Housing Authority)

Aaron Paternoster, Chair, Board of Directors

Date

DOR DISCLOSURE AND SECURITY TRAINING FOR SAFEGUARDING INFORMATION

The Department of Revenue (DOR) provides the Department of Housing and Community Development (DHCD) with confidential wage information to verify applicant eligibility for DHCD programs. Commonwealth agencies or authorities that request access to DOR information for use in their operations must enter into a written agreement with DOR. The agreement imposes requirements pertaining to the confidentiality and physical security of DOR's information. Any unauthorized access, use, or disclosure of DOR information would jeopardize the public's trust and require the issuance of legally mandated notifications.

There are several areas, identified by DOR and DHCD, where security over DOR information and personal information could be improved, in general.

Your signature below will indicate that you have read and thoroughly understand the contents of the acknowledgement and security training for safeguarding information, below:

1. Read and executed the "*DOR Disclosure and Security Training for Safeguarding Information,*" (Attachment),
2. Received and reviewed the "*DHCD Identifying and Safeguarding Personal Information – Training,*" (Attachment)
3. Received and reviewed the "*Executive Office of Housing and Economic Development (EOHED) Privacy and Information Security Brochure.*" (Attachment)

Your LHA will retain the signed acknowledgements on file at your housing authority.

ATTACHMENTS:

- DOR Disclosure and Security Training for Safeguarding Information
- DHCD Identifying and Safeguarding Personal Information – Training
- Executive Office of Housing and Economic Development (EOHED) Privacy and Information Security Brochure

**SUMMARY OF MASSACHUSETTS AND FEDERAL LAWS PERTAINING TO
CONFIDENTIALITY OF INFORMATION OF
THE MASSACHUSETTS DEPARTMENT OF REVENUE**

- 1) Fair Information Practices Act (FIPA), G.L. c. 66A: Prohibits the unauthorized disclosure of "personal data," as defined in G.L. c. 66A. Data subjects may make a claim for damages under the Massachusetts Tort Claims Act. General Laws chapter 214, section 3B also provides for injunctive and other nonmonetary relief for violation of this statute.
- 2) G.L. c. 62C, § 21: Prohibits unauthorized disclosure of tax information or returns as defined in 830 CMR 62C.21.1. A return is defined very broadly in 830 CMR 62C.21.1 and includes information developed by the Department. Violation of this statute is punishable by a fine of not more than \$1,000 and/or by imprisonment for not more than six months, and by disqualification from holding office in the Commonwealth for a period not exceeding three years.
- 3) G.L. c. 62C, § 21B: Prohibits unauthorized willful inspection ("browsing") of tax information or returns as defined in 830 CMR 62C.21.1. A return is defined very broadly in 830 CMR 62C.21.1 and includes information developed by the Department. Violation of this statute is punishable by a fine of not more than \$1,000 per return, document or taxpayer and/or by imprisonment for not more than one year, and by disqualification from holding office in the Commonwealth for a period not exceeding three years. This section also provides that "browsing" by an employee shall be grounds for dismissal of the employee.
- 4) G.L. c. 62E, § 8: Prohibits unauthorized disclosure of information obtained from the wage reporting and financial institution match system. Violation of this statute is punishable by a fine of \$100 per offense and by administrative discipline.
- 5) G.L. c. 119A, § 5A: Prohibits unauthorized willful inspection ("browsing") or unauthorized disclosure of child support personal data, including data stored in a computer system or computer files. Any such inspection or disclosure is punishable by a fine of not more than \$1,000 with respect to each person concerning whom information has been disclosed or inspected and/or by imprisonment for not more than one year, and by disqualification from holding office in the Commonwealth for a period not exceeding three years. This section provides that unauthorized disclosure or "browsing" of child support data by an employee shall be grounds for dismissal of the employee. This law also places additional restrictions on the disclosure of location information about a parent or child when the agency is provided with reasonable evidence of a risk of harm.
- 6) I. R. C. § 6103: Prohibits unauthorized disclosure of federal tax returns or return information by employees and former employees of state and IV-D agencies.
- 7) I. R. C. § 7213: Makes any unauthorized disclosure of federal tax returns or return information a felony punishable by a fine of up to \$5,000 and/or imprisonment for not more than five years, together with the costs of prosecution.

**SUMMARY OF MASSACHUSETTS AND FEDERAL LAWS PERTAINING TO
CONFIDENTIALITY OF INFORMATION OF
THE MASSACHUSETTS DEPARTMENT OF REVENUE**

- 8) I. R. C. § 7213A: Prohibits the unauthorized willful inspection ("browsing") of federal tax returns or return information and makes such inspection punishable by a fine of up to \$1,000 and/or imprisonment for not more than one year, together with the costs of prosecution.
- 9) I. R. C. § 7431: Permits a taxpayer to bring a civil action for damages in a federal district court against a person who unlawfully browsed or disclosed federal return or return information.

SAFEGUARDING THE MASSACHUSETTS DEPARTMENT OF REVENUE'S INFORMATION

I. Purpose

This document is to establish and maintain uniform confidentiality and security standards and procedures that must be adhered to by all Agencies receiving information from the Department of Revenue (DOR) to ensure that the policies, practices, controls, and safeguards employed by an Agency adequately protect this confidential information. This Document is an Addendum to any data exchange agreement between DOR and the Agency.

II. Definitions

For the purpose of this document, the term:

"Agency" shall include any state agency or other entity receiving information from DOR.

"Employee" shall include all state and non-state employees, contract employees, individual consultants, volunteers, trainees, student interns, members, directors, officers, partners, agents and subcontractors who may have access to the confidential information.

"DOR Information" shall include any type of information received from DOR, including, but not limited to, tax information, wage reporting information, bank match information, and child support information.

III. General Safeguard Requirements

The Agency must assign a Contract Manager, at a Director level or higher, to assume full responsibility for, and ensure compliance with, the Agency's safeguard standards and procedures. The Agency must furnish a current organizational chart to demonstrate the individual's role and function within the organization.

When a data exchange agreement expires or is terminated, all DOR Information, files, and cartridges in possession of the Agency are to be destroyed or returned to DOR. The Agency must sign an affidavit confirming that all DOR Information, files and cartridges have been returned to the DOR's Inspectional Services Division. The Inspectional Services Division will retrieve the data from all sites and facilities where it had been maintained.

Access to areas containing the DOR Information in any form (computer printout, photocopies, tapes, notes, etc.) during the normal business day must be limited by creating restricted areas, security rooms, or locked rooms or files. Additionally, the DOR Information in any form (computer printout, photocopies, tapes, notes, etc.) must be protected during non-business hours by secured or locked premises, secured areas, or containerization.

The Agency will implement rules and procedures to ensure that Employees do not leave computers or paper containing the DOR Information unprotected at any time.

The DOR Information must never be commingled with other Agency information without the written approval of John Moynihan, Deputy Commissioner, Inspectional Services Division.

The DOR Information must never be transmitted or used on E-mail systems or sent via the Internet unless encrypted.

The DOR Information may not, under any circumstance, be taken off of the Agency's worksite.

IV. Safeguard of Paper Copies of DOR Information Received via Commbridge

The Agency shall send written notice to Mr. Moynihan within 48 hours if any employee authorized to access DOR Information has been terminated, laid off or involuntarily removed in any way from his/her employment. This requirement also applies to contractors, vendors or temporary workers.

The Agency will take every precaution available to ensure the physical security of the DOR Information under its control, including, but not limited to: fire protection; protection against smoke and water damage; alarm systems; locked files or rooms; limited access; or other means to prevent loss or unauthorized removal of manually held data.

The DOR Information must never be in the open sight of an Employee not authorized to access the DOR Information.

The DOR Information must never be left unattended at an Employee's desk, the photocopy machine, the fax machine, etc.

The DOR Information furnished to the Agency, and any material generated therefrom, such as extra copies, photo impressions, computer printouts, carbon paper, notes, stenographic notes, and work papers, if no longer needed, must be destroyed on site by individuals who have been previously approved by DOR to have access to the data. DOR Information must never be discarded whole, under any circumstance. The Agency must maintain a log and inventory documenting the shredding of DOR Information.

Shredding must be conducted in conformance with applicable state and federal regulations.

V. Safeguard of Electronic Copies or Maintaining DOR Information Received via Commbridge on Agency or Entity Computer System

The Agency will continuously monitor the use of the DOR Information maintained on its computer system to ensure that access to this system is limited to personnel with authorization and who have a business need for the DOR Information.

The Agency will require: passwords; access logs; badges; limited terminal access; limited access to input documents; design provisions to limit use of the Information; and any other method necessary to protect the data and to prevent loss or unauthorized access to the DOR Information. Appropriate data center access control logs must be maintained by the Agency.

The Agency will work with DOR to ensure that all passwords have certain parameters; including, but not limited to; eight characters with one character consisting of at least one number or special character; and a mix of upper and lower case letters. Administrative passwords must be complex and be maintained by the system administrator of the server and be unique to the functional area. No single password is to be maintained across all servers.

The Agency will conduct periodic data purifications and user account validation. The Agency will immediately terminate access to the computer system of any Employee that is no longer authorized to access the DOR Information.

Any transmission of the data must occur over a secure and encrypted connection.

The Agency's server system must be a dedicated system on an isolated network segment with a current Antivirus running at all times and housed in a physically secure computer room with limited authorized personnel access controls in place. Only those individuals approved by DOR to access the data will be allowed access to the DOR Information in the system.

Information received from DOR may never be maintained on a mobile or portable device. This prohibition applies to laptop computers, Blackberries, USB flash drives, I-pods, CD Roms, DVD's, floppy disks or the equivalent of any of these devices. Violation of this prohibition shall be grounds for immediate termination of the data exchange agreement.

The DOR Information may be stored on hard disks only if Agency-approved security access control devices (hardware/software) have been installed, are receiving regularly scheduled maintenance, including upgrades, and is being used. Access control should include password security, an audit trail, encryption or guided media, virus detection, and data overwriting capabilities. The DOR Information should never be maintained on any disk not specifically authorized, in writing, by DOR.

Magnetic tape containing the DOR Information should be maintained in a separate pool of tapes and must not be made available for reuse or released for destruction without first being subjected to electromagnetic erasing. If reuse is not intended, the tape should be destroyed by cutting into lengths of 18 inches or less or by burning to effect complete incineration. All DOR Information stored on magnetic media must be encrypted using either a software or hardware encryption methodology.

All transaction access to the DOR Information must be logged and maintained for the period legally required based upon the data being accessed. The Agency must house and maintain these logs. The Agency will be required to provide access to this information to state, federal and DOR authorized contractors upon request.

The Agency is not allowed to transfer the DOR Information to any other agency or third party, including contractors, without the prior written approval of DOR. All approved data transfers are subject to the same, or additional conditions as defined in the data exchange agreement.

The Agency may maintain the DOR Information on its system only for as long as it is relevant or useful to the Agency. The Agency is responsible for the data destruction upon the end of the

data life or upon the termination of this data exchange agreement and must provide proof of the destruction to DOR. The Agency is required to follow the best practices contained in the NIST 800-53 Standard regarding the destruction of electronic or paper media.

VI. CONTRACTORS

No work involving the DOR Information will be contracted without prior written approval of DOR. The identities and personal information of all contractors, vendors and non-agency employees will be provided to DOR for whatever background investigation DOR deems necessary prior to these individuals having access to the DOR Information.

The Agency must account for the use of all contractors, permitted by law or regulation, to do programming, processing, or administrative services requiring access to the DOR Information.

DOR DISCLOSURE AND SECURITY TRAINING FOR SAFEGUARDING INFORMATION

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2. Received and reviewed the "DHCD Identifying and Safeguarding Personal Information – Training," (Attachment)
3. Received and reviewed the "Executive Office of Housing and Economic Development (EOHED) Privacy and Information Security Brochure." (Attachment)

Your LHA will retain the signed acknowledgements on file at your housing authority.

ATTACHMENTS:

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CONFIDENTIALITY OF INFORMATION OF
THE MASSACHUSETTS DEPARTMENT OF REVENUE**

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- 2) G.L. c. 62C, § 21: Prohibits unauthorized disclosure of tax information or returns as defined in 830 CMR 62C.21.1. A return is defined very broadly in 830 CMR 62C.21.1 and includes information developed by the Department. Violation of this statute is punishable by a fine of not more than \$1,000 and/or by imprisonment for not more than six months, and by disqualification from holding office in the Commonwealth for a period not exceeding three years.
- 3) G.L. c. 62C, § 21B: Prohibits unauthorized willful inspection ("browsing") of tax information or returns as defined in 830 CMR 62C.21.1. A return is defined very broadly in 830 CMR 62C.21.1 and includes information developed by the Department. Violation of this statute is punishable by a fine of not more than \$1,000 per return, document or taxpayer and/or by imprisonment for not more than one year, and by disqualification from holding office in the Commonwealth for a period not exceeding three years. This section also provides that "browsing" by an employee shall be grounds for dismissal of the employee.
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- 5) G.L. c. 119A, § 5A: Prohibits unauthorized willful inspection ("browsing") or unauthorized disclosure of child support personal data, including data stored in a computer system or computer files. Any such inspection or disclosure is punishable by a fine of not more than \$1,000 with respect to each person concerning whom information has been disclosed or inspected and/or by imprisonment for not more than one year, and by disqualification from holding office in the Commonwealth for a period not exceeding three years. This section provides that unauthorized disclosure or "browsing" of child support data by an employee shall be grounds for dismissal of the employee. This law also places additional restrictions on the disclosure of location information about a parent or child when the agency is provided with reasonable evidence of a risk of harm.
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**SUMMARY OF MASSACHUSETTS AND FEDERAL LAWS PERTAINING TO
CONFIDENTIALITY OF INFORMATION OF
THE MASSACHUSETTS DEPARTMENT OF REVENUE**

- 8) I. R. C. § 7213A: Prohibits the unauthorized willful inspection ("browsing") of federal tax returns or return information and makes such inspection punishable by a fine of up to \$1,000 and/or imprisonment for not more than one year, together with the costs of prosecution.
- 9) I. R. C. § 7431: Permits a taxpayer to bring a civil action for damages in a federal district court against a person who unlawfully browsed or disclosed federal return or return information.

SAFEGUARDING THE MASSACHUSETTS DEPARTMENT OF REVENUE'S INFORMATION

I. Purpose

This document is to establish and maintain uniform confidentiality and security standards and procedures that must be adhered to by all Agencies receiving information from the Department of Revenue (DOR) to ensure that the policies, practices, controls, and safeguards employed by an Agency adequately protect this confidential information. This Document is an Addendum to any data exchange agreement between DOR and the Agency.

II. Definitions

For the purpose of this document, the term:

"Agency" shall include any state agency or other entity receiving information from DOR.

"Employee" shall include all state and non-state employees, contract employees, individual consultants, volunteers, trainees, student interns, members, directors, officers, partners, agents and subcontractors who may have access to the confidential information.

"DOR Information" shall include any type of information received from DOR, including, but not limited to, tax information, wage reporting information, bank match information, and child support information.

III. General Safeguard Requirements

The Agency must assign a Contract Manager, at a Director level or higher, to assume full responsibility for, and ensure compliance with, the Agency's safeguard standards and procedures. The Agency must furnish a current organizational chart to demonstrate the individual's role and function within the organization.

When a data exchange agreement expires or is terminated, all DOR Information, files, and cartridges in possession of the Agency are to be destroyed or returned to DOR. The Agency must sign an affidavit confirming that all DOR Information, files and cartridges have been returned to the DOR's Inspectional Services Division. The Inspectional Services Division will retrieve the data from all sites and facilities where it had been maintained.

Access to areas containing the DOR Information in any form (computer printout, photocopies, tapes, notes, etc.) during the normal business day must be limited by creating restricted areas, security rooms, or locked rooms or files. Additionally, the DOR Information in any form (computer printout, photocopies, tapes, notes, etc.) must be protected during non-business hours by secured or locked premises, secured areas, or containerization.

The Agency will implement rules and procedures to ensure that Employees do not leave computers or paper containing the DOR Information unprotected at any time.

The DOR Information must never be commingled with other Agency information without the written approval of John Moynihan, Deputy Commissioner, Inspectional Services Division.

The DOR Information must never be transmitted or used on E-mail systems or sent via the Internet unless encrypted.

The DOR Information may not, under any circumstance, be taken off of the Agency's worksite.

IV. Safeguard of Paper Copies of DOR Information Received via Commbridge

The Agency shall send written notice to Mr. Moynihan within 48 hours if any employee authorized to access DOR Information has been terminated, laid off or involuntarily removed in any way from his/her employment. This requirement also applies to contractors, vendors or temporary workers.

The Agency will take every precaution available to ensure the physical security of the DOR Information under its control, including, but not limited to: fire protection; protection against smoke and water damage; alarm systems; locked files or rooms; limited access; or other means to prevent loss or unauthorized removal of manually held data.

The DOR Information must never be in the open sight of an Employee not authorized to access the DOR Information.

The DOR Information must never be left unattended at an Employee's desk, the photocopy machine, the fax machine, etc.

The DOR Information furnished to the Agency, and any material generated therefrom, such as extra copies, photo impressions, computer printouts, carbon paper, notes, stenographic notes, and work papers, if no longer needed, must be destroyed on site by individuals who have been previously approved by DOR to have access to the data. DOR Information must never be discarded whole, under any circumstance. The Agency must maintain a log and inventory documenting the shredding of DOR Information.

Shredding must be conducted in conformance with applicable state and federal regulations.

V. Safeguard of Electronic Copies or Maintaining DOR Information Received via Commbridge on Agency or Entity Computer System

The Agency will continuously monitor the use of the DOR Information maintained on its computer system to ensure that access to this system is limited to personnel with authorization and who have a business need for the DOR Information.

The Agency will require: passwords; access logs; badges; limited terminal access; limited access to input documents; design provisions to limit use of the Information; and any other method necessary to protect the data and to prevent loss or unauthorized access to the DOR Information. Appropriate data center access control logs must be maintained by the Agency.

The Agency will work with DOR to ensure that all passwords have certain parameters; including, but not limited to; eight characters with one character consisting of at least one number or special character; and a mix of upper and lower case letters. Administrative passwords must be complex and be maintained by the system administrator of the server and be unique to the functional area. No single password is to be maintained across all servers.

The Agency will conduct periodic data purifications and user account validation. The Agency will immediately terminate access to the computer system of any Employee that is no longer authorized to access the DOR Information.

Any transmission of the data must occur over a secure and encrypted connection.

The Agency's server system must be a dedicated system on an isolated network segment with a current Antivirus running at all times and housed in a physically secure computer room with limited authorized personnel access controls in place. Only those individuals approved by DOR to access the data will be allowed access to the DOR Information in the system.

Information received from DOR may never be maintained on a mobile or portable device. This prohibition applies to laptop computers, Blackberries, USB flash drives, I-pods, CD Roms, DVD's, floppy disks or the equivalent of any of these devices. Violation of this prohibition shall be grounds for immediate termination of the data exchange agreement.

The DOR Information may be stored on hard disks only if Agency-approved security access control devices (hardware/software) have been installed, are receiving regularly scheduled maintenance, including upgrades, and is being used. Access control should include password security, an audit trail, encryption or guided media, virus detection, and data overwriting capabilities. The DOR Information should never be maintained on any disk not specifically authorized, in writing, by DOR.

Magnetic tape containing the DOR Information should be maintained in a separate pool of tapes and must not be made available for reuse or released for destruction without first being subjected to electromagnetic erasing. If reuse is not intended, the tape should be destroyed by cutting into lengths of 18 inches or less or by burning to effect complete incineration. All DOR Information stored on magnetic media must be encrypted using either a software or hardware encryption methodology.

All transaction access to the DOR Information must be logged and maintained for the period legally required based upon the data being accessed. The Agency must house and maintain these logs. The Agency will be required to provide access to this information to state, federal and DOR authorized contractors upon request.

The Agency is not allowed to transfer the DOR Information to any other agency or third party, including contractors, without the prior written approval of DOR. All approved data transfers are subject to the same, or additional conditions as defined in the data exchange agreement.

The Agency may maintain the DOR Information on its system only for as long as it is relevant or useful to the Agency. The Agency is responsible for the data destruction upon the end of the

data life or upon the termination of this data exchange agreement and must provide proof of the destruction to DOR. The Agency is required to follow the best practices contained in the NIST 800-53 Standard regarding the destruction of electronic or paper media.

VI. CONTRACTORS

No work involving the DOR Information will be contracted without prior written approval of DOR. The identities and personal information of all contractors, vendors and non-agency employees will be provided to DOR for whatever background investigation DOR deems necessary prior to these individuals having access to the DOR Information.

The Agency must account for the use of all contractors, permitted by law or regulation, to do programming, processing, or administrative services requiring access to the DOR Information.

Privacy &

Information Security



Privacy is the right to be free of unnecessary public scrutiny or to be left alone, the quality or state of being apart from observation

Security is the state or feeling of being safe or protected. precautions taken to keep somebody or something safe from crime, attack or danger.

Executive Office of Housing & Economic Development

1 Ashburton Place
21st floor
Boston, MA 02108

www.mass.gov/hed

Social Engineering—the practice of obtaining confidential information by manipulation of legitimate users. A social engineer will commonly use the phone or Internet to trick people into revealing sensitive information or getting them to do something that is again typical policies or actions. By this method, social engineers exploit the natural tendency of a person to trust his or her word, rather than explicit computer security "holes". It is generally agreed upon that "users are the weak link" in security and this principle is what makes social engineering possible.

Phishing—Mail or electronic messages (text/inv) that pretend to be financial institutions or companies that attempt to get you to reveal your personal information or that of others.

Dumpster Diving—rummaging through trash looking for paper with personal information on it.

Old fashioned stealing—taking of information from wallets/purses, rummaging through office files, unattended computing devices, or asking employees who have access to private information to disclose it.

Confidential Information is:

Social Security numbers

User ID's and Passwords

Bank Account numbers

Credit Card numbers

Birth Information

Medical data

EOHED is legally required to keep our business information secure. This brochure is a reminder to you of your responsibilities as an employee of the Secretariat. Breaches of confidential information can put you and the agency at risk.

Ask yourself this - would you want your privacy compromised due to someone else's carelessness? Do you want to be liable for a breach of private information?

It is easy to become complacent in your day to day work. You think you are helping others by just "sending something along" to them in an email...or just forwarding on some information...or you are in a hurry so you leave that spreadsheet on your desk in full view...or you make too many copies and drop the extras into the trash....

Actions such as those above may very well have serious consequences. If you are in possession of sensitive data then you must take measures to protect that data.

YOU ARE RESPONSIBLE!

Questions to ask yourself

- What information do I really need?
 - What data should I be collecting?
 - Is SSN required? Are you sure?
 - What data is critical to this task?
 - Who do I need to share this with?
 - Why am I sharing this?
 - How should I get this data to someone?
 - Will anyone else see this information?
 - How safe is this information in someone else's hands?
-
- Is computing equipment where anyone can get to it?
 - Is the main office locked? When? Who has keys?
 - Are locked cabinets in use? Shredders? Desks clean?
-
- Is there a startup password on computing devices?
 - Are screensavers activated and password protected?
 - Do PC hard drives prevent file storage on them?
 - Are USB's allowed to be shared/taken off site?
 - Are passwords strong and changed frequently?
 - Is network equipment in a secure area?
 - Can users log in remotely? Is agreement signed?
 - Are computing resources protected with anti-virus and firewall programs that are up to date?
 - Do you password protect or encrypt confidential files?
 - Do you know how to send/receive secure emails?
 - Are files containing confidential data secured in a restricted directory/file share on network?
 - If you use portable media, is it stored securely?
 - Are the business web based applications secured through software controls and id/s and passwords?
 - Are the vendors you work with clear on their role and responsibilities when it comes to data security?

Business & organizational Improvements

- Do you understand what data is "private", needs to be "secured" and where it lives in your business environment?
- Are information technology policies and procedures in place?
- Are you aware of the current policies and procedures?
- Have you signed off on receiving, reviewing and acknowledging those policies?
- Are you trained on how to put those policies and procedures into practice?
- Do you know the steps to take if there is a breach of data considered to be confidential/private?
- Do you understand social engineering practices?
- Are there plans to review and revise business security practices and make improvements?

All levels of the organization need to take responsibility.

Remember to manage the exposure risk.

awareness, training and professionalism on all levels is necessary for success.

IDENTIFYING AND SAFEGUARDING PERSONAL INFORMATION - TRAINING

Department of Housing and Community Development

2018

Regulations

MA General Law or Code of Regulations	Subject
M.G.L. c. 66	Public Records
M.G.L. c. 4, §7(26)	Exemptions to Public Records
M.G.L. c. 66A	Fair Information Practices
M.G.L. c. 93H	Security Breaches
950 CMR 32.00	Public Records Access
201 CMR 17.00	Standards for the Protection of Personal Information of Residents of the Commonwealth

System Security

- Consider that each network device is an entry point (computer, laptop, smartphone, server).
- Employee computers are part of the agency's network.

Comply with the Acceptable Use Policy

- Do not access or disseminate Personal Information unless required by your job.
- Never share passwords.

Comply with Specific System User Account Requirements

- Use strong passwords.
- Don't use somebody else's password or user ID.
- Lock computer when away from desk, lock away portable devices

Information Security Program

□ Goal of Information Security Program:

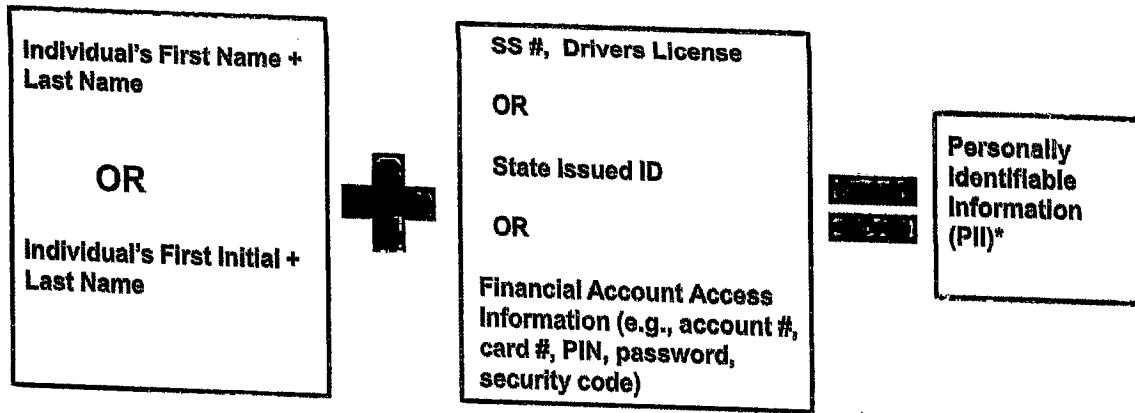
Adopt and implement the maximum feasible measures reasonably needed to ensure the security, confidentiality and integrity of Personal Information.

□ All Employees Must:

- Collect the minimum quantity of Personal Information reasonably needed to accomplish legitimate purpose for which information is being collected.
- Securely store and protect Personal Information.
- Disclose Personal Information and data only on a need to know basis.
- Destroy Personal Information and data as soon as it is no longer needed or required to be maintained under state or federal law.

PERSONAL INFORMATION

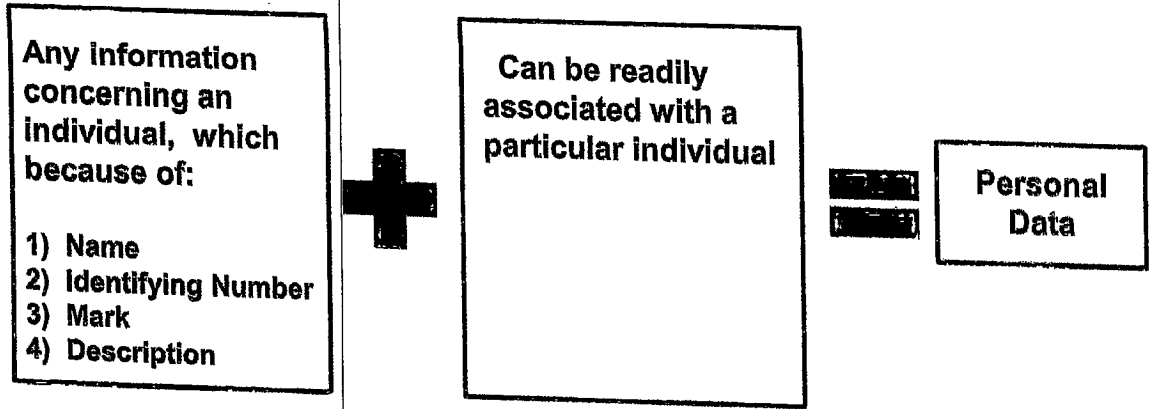
(as defined by M.G.L. c. 93H, § 1)



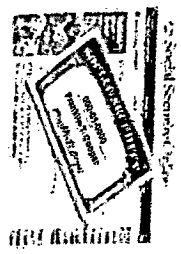
*Throughout this training, we will use "PII," the universally accepted acronym for Personally Identifiable Information, which means the same as Personal Information.

Personal Data

(as defined by the Fair Information Practices Act - FIPA)



DEPOSIT



Medical History Questionnaire

A grid of empty boxes for data entry, typical of a medical questionnaire.

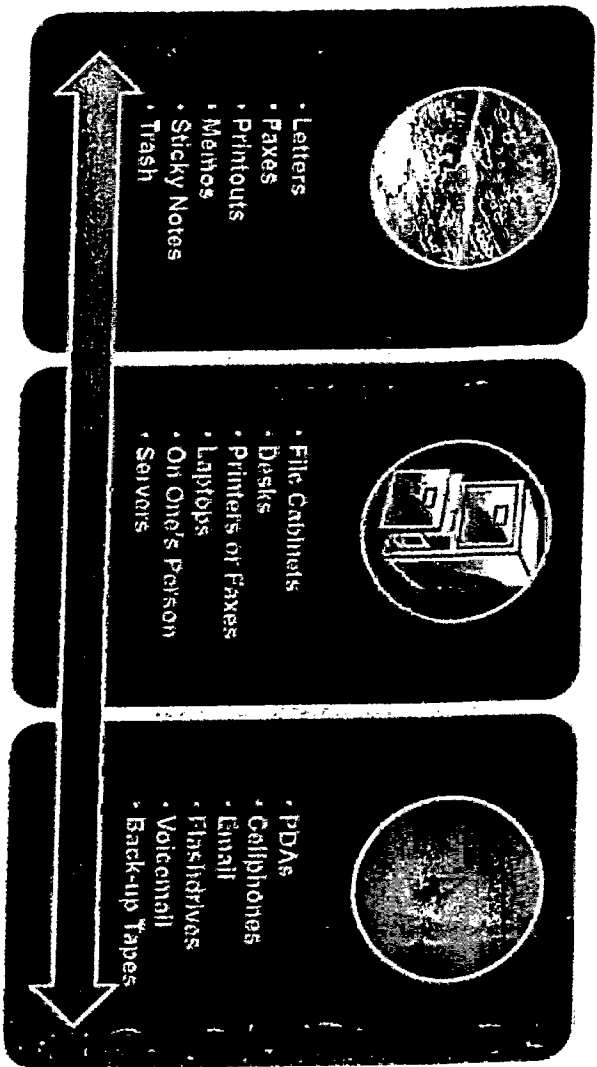
✓ Information contained in a public record (MGL c. 4, § 7(26),

✓ Intelligence information, evaluative information,

OR

✓ Criminal record information (as defined in MGL c. 6, § 167), which shall be governed by the Criminal Offender Record Information Act (CORI).

VIVID PII WAY LIVE



PII may be physical, electronic or verbal

- Security desk/reception desk: Visitors must sign in.
- Access ID: Everyone must have access pass to enter offices.
- Lock file cabinets.
- Do not leave PII unattended in non-secure environment.
- Network devices need to be secure and only used by authorized staff.
- Use (encrypted) Secure File Email Delivery (SFED) if you must send documents with PII.
- Password protect files if they contain PII.
- Log off or lock desktop when you step away from your computer for an extended period of time during your workday.

**Verbal propagation of PII needs safeguarding:
Only discuss PII when appropriate and only discuss in private spaces.**

Screen Policy

Establish a culture of security and trust.

- A clean desk can produce a positive image when our business partners visit the agency.
- Reduce the threat of a security incident as confidential information will be locked away when unattended.
- Sensitive documents left in the open can be stolen by a malicious entity.
- Sensitive working papers are expected to be placed in locked drawers/cabinets.
- Consider scanning paper items and filing them electronically.
- Use shredding/secure destruction bins for sensitive paper documents when they are no longer needed.
- Lock your desk and filing cabinets at the end of the day.
- Lock your computer screen when you leave your desk for an extended period or if someone is in your office unattended.
- Log off your computer when you leave your desk at the end of the work day.
- Lock away portable computing devices such as laptops or PDA devices.
- Treat mass storage devices such as CDROM, DVD or USB drives as sensitive and secure them in a locked drawer.

**Verbal propagation of PII needs safeguarding:
Only discuss PII when appropriate and only discuss in private spaces.**

Collect Minimum Quantity

- If you don't need it, don't ask for it.
- Only access info necessary for the proper performance of your job.
- De-identify data at time of collection, input, querying as much as possible.

Disclose PII only on a NEED-TO-KNOW basis

- If you receive a request for PII outside of the normal course of program management, escalate the request before responding.
- Beware of non-authorized people (e.g., social science researchers) seeking info (or means to access PII).

Complete Data Exchange Acknowledgement

- Complete it if data is sent outside.
- Contact EOHED Information Security Officer for a copy of the acknowledgement.

Protect Your Passwords

- Never share your passwords.
- Make computer and file passwords unique.
- Place a "Do Not Forward" disclaimer on outgoing documents with PII in them.

Destroy PII When No Longer Needed

Before Destruction Consider the Following:

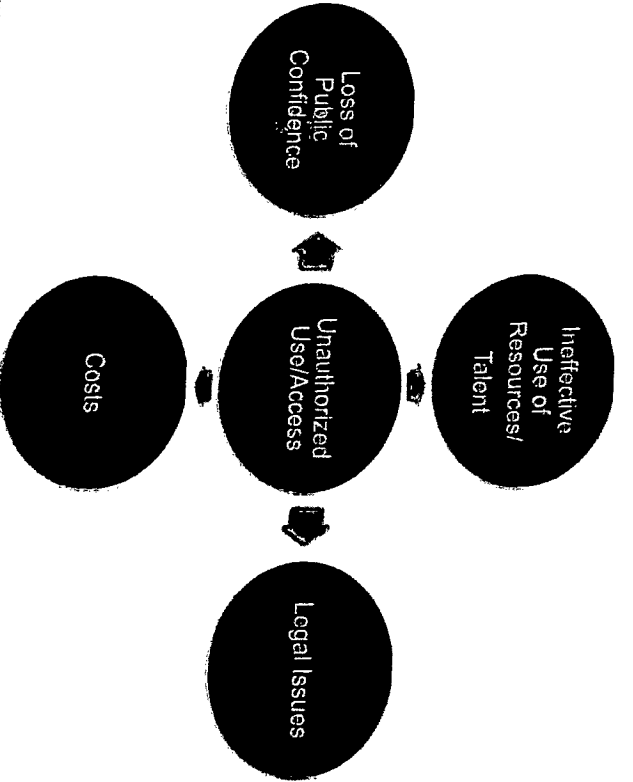
- Active Litigation Hold
(confirm with Legal/General Counsel)
- Record Retention Requirements

Methods of Destruction

Use Proper Destruction Methods Including:

- Cross-shredding or secure containers for paper documents
- Proper, secure destruction of electronic files and equipment hard drives

Use or Access of PII



Massachusetts Law creates specific duties for the owners/users of information that tie a person to information that might be considered private

In the event of a breach or loss of data/equipment:

DO:

Immediately Notify the Executive Director
OR
Legal/General Counsel

DO NOT:

Ignore It
Hide It
Wait

Acting quickly and notifying the appropriate people may help mitigate the damage

Perceived Risk	Severity	Mitigation Tactic
You are taking over the function(s) from a predecessor and his/her files contain old files with Social Security Numbers.	Low	Alert the Legal/General Counsel or the HR Director to determine how to handle the files. Do not destroy or move first.
You require data or information about a particular program, agency etc., and your request is not specific as to what you need and you are sent personnel files in the package.	Low	Collect minimum quantity only. If you do not need the information, do not ask for it.
You are creating a database or data set that contains PII.	High	Only access information necessary for the proper performance of your job; speak with the Executive Director to determine appropriate access controls.
You are leaving for the night and you do not shut down your computer or put away the information on your desk because you will be back in the morning.	Moderate	Securely store and protect PII against unauthorized access, destruction, use, modification, disclosure and loss.
You receive a request for Personal Information outside of the normal course of program management.	Moderate	Escalate the request to the Executive Director or Legal/General Counsel before responding.
Unauthorized people seek Personal Information from you or your means to access it.	Low	Beware of unauthorized people and requests. Do NOT share or disclose passwords. Disclose PII only on a NEED-TO-KNOW basis.

COLLECT

The minimum quantity of Personal Information reasonably needed to accomplish legitimate purpose, for which information is being collected.

IMPLEMENT

The maximum feasible measures reasonably needed to ensure the security, confidentiality, and integrity of Personal Information.

SECURELY STORE

And protect Personal Information against unauthorized access, destruction, modification, disclosure, and loss.

DO NOT DISCLOSE

Personal Information and data except on a need-to-know basis.

DESTROY

Personal Information and Data as soon as it is no longer needed or required to be maintained under state or federal law.

COMPLY

With the Agency's administrative, technical, and physical safeguards for Personal Information.
With relevant federal and state privacy and security laws and regulations.

1. YOU

Are responsible for identifying and safeguarding PII.

2. THINK

Before accessing or transmitting PII.

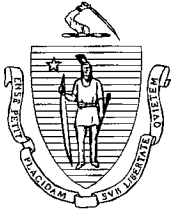
DO NOT

3. RELEASE OR ACCEPT

Any PII to or from anyone outside of appropriate agency personnel without first vetting it through an internal process. (i.e., contact Executive Director or Legal/General Counsel)

4. ESCALATE

Questions about what PII is to Executive Director or Legal/General Counsel or DHCD Management contact(s).



Commonwealth of Massachusetts Executive Office of Housing & Livable Communities

Maura T. Healey, Governor ♦ Kimberly Driscoll, Lt. Governor ♦ Ed Augustus, Secretary

October 21, 2025

Cathy Hoog
Salem Housing Authority
27 CHARTER STREET
SALEM, MA 01970

Dear Director Hoog:

Attached please find Amendment #21 to the Contract for Financial Assistance (CFA) 5001 in the amount of **\$125,000.00**. Included for signature is the Commonwealth of Massachusetts – Standard Contract Form and Attachment A – Additional Terms and Conditions and CFA Amendment (“Amendment”). This amendment funds the following and extends the contract dates of service from June 30, 2028 to June 30, 2035.

Scope	Award Amount
258150 - Electrical Upgrades	\$125,000.00

CFA	Current CFA	Revised CFA	Change
5001	\$23,032,217.74	\$23,157,217.74	+\$125,000.00

Please be sure to place this CFA on your next Agenda and **execute in Docusign within 8 weeks as outlined in Public Housing Notice 2023 – 09, “Updates to Performance Management Review (PMR) for 2023 Cycle”** [download \(mass.gov\)](#). Executed CFAs will only be accepted in DocuSign.

Please have your Chairperson or designated Signatory execute Page 1 of the Standard Contract Form on or after the Board meeting. A certified copy of the Extracts of the Minutes of the Meeting should be emailed after execution to EOHLCCapitalFinance@mass.gov. All future Capital Improvement Reports must be adjusted to reflect this change. A fully executed CFA will be available in DocuSign after encumbrance for your file. Please feel free to contact me at colleen.votour@mass.gov or steven.garuti@mass.gov if you have any questions.

Sincerely,

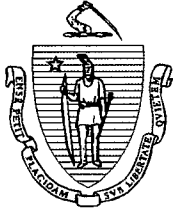
Colleen Votour

Colleen Votour, Senior Accountant
Bureau of Housing Development and Construction



This form is jointly issued and published by the Office of the Comptroller, the Executive Office for Administration and Finance, and the Operational Services Division as the default contract for all Commonwealth Departments when another form is not prescribed by regulation or policy. The Commonwealth deems void any changes made on or by attachment (in the form of addendum, engagement letters, contract forms or invoice terms) to the terms in this published form or to the Standard Contract Form Instructions and Contractor Certifications, the Commonwealth Terms and Conditions, the Commonwealth Terms and Conditions for Human and Social Services or the Commonwealth IT Terms and Conditions which are incorporated by reference herein. Additional non-conflicting terms may be added by Attachment. Contractors are required to access forms at macomptroller.org/forms or mass.gov/lists/osd-forms.

CONTRACTOR INFORMATION			COMMONWEALTH INFORMATION		
Contractor Legal Name Salem Housing Authority		d/b/a	Department Executive Office of Housing & Livable Communities		MMARS Code OCD
Legal Address As entered on Form W-9 or Form W-4 27 CHARTER STREET, SALEM, MA 01970			Contract Manager Name Fatima Razzaq	Business Mailing Address 100 Cambridge Street, Suite 300, Boston MA 02114	
Contract Manager Name Cathy Hoog			Billing Address If Different		
Phone 978-744-4432	Email choog@salemha.org	Fax 978-744-9614	Phone 617-573-1100	Email Fatima.Razzaq@mass.gov	Fax 617-573-1345
Vendor Code VC6000192206			MMARS Doc ID(s) CC0CD252011302510000		
Vendor Code Address ID AD001 e.g. "AD001". Note: The Address ID must be set up for Electronic Funds Transfer (EFT) payments.			RFR/Procurement or Other ID Number MGL121B-23BSEC3		
NEW CONTRACT			X CONTRACT AMENDMENT		
Procurement or Exception Type (Check one option only) <input type="checkbox"/> Statewide Contract (OSD or an OSD-designated department.) <input type="checkbox"/> Collective Purchase (Attach OSD approval, scope, and budget.) <input type="checkbox"/> Department Procurement - Includes all Grants 815 CMR 2.00. (Attach Solicitation Notice or RFR, and Response or other procurement supporting documentation.) <input type="checkbox"/> Emergency Contract (Attach justification for emergency, scope, and budget.) <input type="checkbox"/> Contract Employee (Attach Employee Status Form, scope, and budget.) <input type="checkbox"/> Interim Contract with new Contractor (Attach justification for Interim Contract and updated scope/budget.) <input type="checkbox"/> Other Procurement Exception (Attach authorizing language, legislation with specific exemption or earmark, and exception justification, scope, and budget.)			Current Contract End Date PRIOR to Amendment June 30, 2028 Amendment Amount Or Enter "No Change" +\$125,000.00 Amendment Type (Check one option only. Attach details of amendment changes.) <input checked="" type="checkbox"/> Amendment to Date, Scope, or Budget (Attach updated scope and budget.) <input type="checkbox"/> Interim Contract with Current Contractor (Attach justification for Interim Contract and updated scope/budget.) <input type="checkbox"/> Contract Employee (Attach any updates to scope or budget.) <input type="checkbox"/> Other Procurement Exception (Attach authorizing language/justification and updated scope/budget.)		
TERMS AND CONDITIONS (Check ONE option)					
The Standard Contract Form Instructions and Contractor Certifications and the following document are incorporated by reference into this Contract and are legally binding: <input checked="" type="checkbox"/> Commonwealth Terms and Conditions <input type="checkbox"/> Commonwealth Terms and Conditions for Human and Social Services <input type="checkbox"/> Commonwealth IT Terms and Conditions					
COMPENSATION (Check ONE option.)					
The Department certifies that payments for authorized performance accepted in accordance with the terms of this Contract will be supported in the state accounting system by sufficient appropriations or other non-appropriated funds, subject to intercept for Commonwealth owed debts under 815 CMR 9.00. <input type="checkbox"/> Rate Contract (No Maximum Obligation). (Attach details of all rates, units, calculations, conditions or terms and any changes if rates or terms are being amended.) <input checked="" type="checkbox"/> Maximum Obligation Contract. Total maximum obligation for total duration of this contract (or new total if contract is being amended): \$23,157,217.74					
PROMPT PAYMENT DISCOUNTS (PPD)					
Commonwealth payments are issued through Electronic Funds Transfer (EFT) 45 days from invoice receipt. See <u>Prompt Pay Discounts Policy</u> . Contractors requesting accelerated payments must identify a PPD as follows: Payment issued within: 10 days ___% PPD. 15 days ___% PPD. 20 days ___% PPD. 30 days ___% PPD. If PPD percentages are left blank, identify reason: <input type="checkbox"/> Statutory/legal <input type="checkbox"/> Ready Payments (M.G.L. c. 29, § 23A) <input type="checkbox"/> Agree to standard 45-day cycle <input checked="" type="checkbox"/> Only initial payment					
BRIEF DESCRIPTION OF CONTRACT PERFORMANCE or REASON FOR AMENDMENT					
Enter the Contract title, purpose, fiscal year(s) and a detailed description of the scope of performance or what is being amended for a Contract Amendment. Attach all supporting documentation and justifications. Amendment #21, Contract for Financial Assistance 258025001: 258150 - Electrical Upgrades as specified in the Contract for Capital Improvement Work Plan/Approved Budget (Exhibit 1) and Timetable for Completion of the Work (Exhibit 2). All such work shall be subject to the requirements set out in the Commonwealth Terms and Conditions in Attachment A.					
SUPPLIER DIVERSITY PROGRAM (SDP) PLAN					
Does the Supplier Diversity Program apply? <input checked="" type="checkbox"/> YES If YES, the Contractor's annual SDP commitment for this Contract is <input checked="" type="checkbox"/> NO If NO, and the department is an Executive Department, enter the appropriate exemption: Award, grant, or subsidy					
ANTICIPATED START DATE (Complete ONE option only.)					
The Department and Contractor certify for this Contract, or Contract Amendment, that Contract obligations: <input checked="" type="checkbox"/> 1. may be incurred as of the Effective Date (latest signature date below) and no obligations have been incurred prior to the Effective Date. <input type="checkbox"/> 2. may be incurred as of ___ 20___, a date LATER than the Effective Date below and no obligations have been incurred prior to the Effective Date. <input type="checkbox"/> 3. were incurred as of ___ 20___, a date PRIOR to the Effective Date below, and the parties agree that payments for any obligations incurred prior to the Effective Date are authorized to be made either as settlement payments or as authorized reimbursement payments, and that the details and circumstances of all obligations under this Contract are attached and incorporated into this Contract. Acceptance of payments forever releases the Commonwealth from further claims related to these obligations.					
CONTRACT END DATE					
Contract performance shall terminate as of June 30, 2035 , with no new obligations being incurred after this date unless the Contract is properly amended, provided that the terms of this Contract and performance expectations and obligations shall survive its termination for the purpose of resolving any claim or dispute, for completing any negotiated terms and warranties, to allow any close out or transition performance, reporting, invoicing or final payments, or during any lapse between amendments.					
CERTIFICATIONS					
Notwithstanding verbal or other representations by the parties, the "Effective Date" of this Contract or Amendment shall be the latest date that this Contract or Amendment has been executed by an authorized signatory of the Contractor, the Department, or a later Contract or Amendment Start Date specified above, subject to any required approvals. The Contractor certifies that they have accessed and reviewed all documents incorporated by reference as electronically published and the Contractor makes all certifications required under the Standard Contract Form Instructions and Contractor Certifications under the pains and penalties of perjury, and further agrees to provide any required documentation upon request to support compliance, and agrees that all terms governing performance of this Contract and doing business in Massachusetts are attached or incorporated by reference herein according to the following hierarchy of document precedence, the applicable Commonwealth Terms and Conditions, this Standard Contract Form, the Standard Contract Form Instructions and Contractor Certifications, the Request for Response (RFR) or other solicitation, the Contractor's Response (excluding any language stricken by a Department as unacceptable, and additional negotiated terms, provided that additional negotiated terms will take precedence over the relevant terms in the RFR and the Contractor's Response only if made using the process outlined in 801 CMR 21.07, incorporated herein, provided that any amended RFR or Response terms result in best value, lower costs, or a more cost effective Contract.					
AUTHORIZING SIGNATURE FOR THE CONTRACTOR			AUTHORIZING SIGNATURE FOR THE COMMONWEALTH		
Signature and date must be captured at time of signature.			Signature and date must be captured at time of signature.		
Signature		Date	Signature		Date
Print Name Aaron Paterno		Print Title	Print Name Fatima Razzaq		Print Title BHD&C Director



Commonwealth of Massachusetts Executive Office of Housing & Livable Communities

Maura T. Healey, Governor ♦ Kimberly Driscoll, Lt. Governor ♦ Ed Augustus, Secretary

Certification of Grant Plan

Executive Office of Housing and Livable Communities Public Housing Capital Improvement/Development Grant

MMARS Doc ID: **CCOCD252011302510000**

Grant- MGL 23B and 121B allow the Executive Office of Housing and Livable Communities (EOHLC) to fund Local Housing Authorities (LHAs). **The funds are considered non-discretionary** (designated) and are made to recipients identified in the department’s Legislative authorization in accordance with 815 CMR 2.04(6). EOHLC grants awards to LHAs through a formula funding process and/or through emergency submissions and special projects, such as sustainability, mixed finance, and others. The funding was authorized in Chapter 129 of the Acts of 2013, Chapter 99 of the Acts of 2018, Section 16 of Chapter 76 of the Acts of 2021 (ARPA) and in previous acts. The acts directed EOHLC to “establish a program to provide predictable funds to be used flexibly by housing authorities for capital improvements to extend the useful life of state-assisted public housing”. Chapter 119 also provides that our “projects may include, but shall not be limited to, projects providing for renovation, remodeling, reconstruction, redevelopment and hazardous material abatement.” As a result of these acts, EOHLC created a system called the Capital Planning System (CPS) with the aid of a consultant, Diversified Intelligence, to assist the LHAs in their capital planning needs assessment. EOHLC awards were made to LHAs based upon this state-wide database of building component conditions. The LHAs must develop, and regularly update, a three-year capital improvement plan (CIP) outlining the projects. EOHLC reviews and approves the plans on an annual basis. The CIP and all relevant back-up documentation are on file at the Executive Office of Housing and Livable Communities (EOHLC).

Attached:

- Vendor’s Project Budget and Project Schedule
- Commonwealth of Massachusetts – Standard Contract Form (SCF)

CERTIFICATION:

“OCD certifies that the Capital Improvement Plan is on file at the Executive Office of Housing and Livable Communities along with all relevant back-up documentation.”

Authorized Department Signatory: _____ Date: _____

Print Name: **Fatima Razzaq**

Print Title: **Director, Bureau of Housing Development and Construction**



ATTACHMENT A/Scope of Services

ADDITIONAL TERMS AND CONDITIONS and CFA AMENDMENT

This Attachment A is part of the contract by and between the Commonwealth of Massachusetts (hereinafter called the "Commonwealth") acting by and through the Executive Office of Housing and Livable Communities (the "Department"), and the **Salem Housing Authority** (the "Authority"), a public body, politic and corporate, duly organized and existing pursuant to Section 3 of Chapter 121B of the General Laws. This Attachment A also amends and modifies the Contract(s) for Financial Assistance ("CFA") for all of the developments listed below by extending the term of each CFA for forty (40) years as herein provided. Such an amendment and modification is a part of the CFA as well as a part of the above-described contract. It may be enforced as part of the CFA or as part of the above-described contract.

Background.

The Authority proposes to modernize and improve the following existing State-Aided housing development(s) as more fully described in an application for capital improvement grant, submitted by the Authority. The Department has approved the application, or portion of the application, and shall provide state financial assistance in the form of a grant of capital improvement funds as provided herein.

Name of Developments: **Contract for Financial Assistance 5001, All developments, included but not limited to 200-01,200-02,667-01,667-1A,667-02,667-3B,667-04,667-05,667-06,667-7A,667-7B,705-05,705-2A,705-2B,705-03,667-3A**

Date of Application: **7/1/2025**

1. The Work Plan/Approved Budget. Subject to the terms and conditions hereinafter set forth, the Commonwealth shall provide state financial assistance in the form of a grant(s) to make capital improvements. The scope of work and budget is defined in the Capital Improvement Work Plan/Approved Budget attached to this contract as "Exhibit 1" and incorporated herein. The Work Plan/Approved Budget may be amended by the Department. A timetable for completion of the work is attached as "Exhibit 2" and is incorporated herein.

The provision of such financial assistance is expressly contingent upon the authorization of the sale of the bonds necessary to raise the funds required herein by the General Court and the release of such funds by the Executive Office for Administration and Finance and the Office of the Comptroller.

2. Approved Work Items. The Authority agrees to undertake only work items authorized in the Work Plan/Approved Budget, and to complete said items at the lowest practicable cost not to exceed the budget. This grant of capital improvement funds is limited by either the grant amount, or by the cost of completing approved work items, whichever is lower. The Department reserves the right to amend the grant amount, the budget and/or the work items in the Work Plan/Approved Budget at its sole discretion.

3. Modernization, Continued Use, and Amendment of CFA. The Authority agrees to undertake and maintain the development(s) modernized or reconstructed as a housing project providing low rent housing, and to comply with Chapter 121B of the General Laws, the Departments Regulations, and the written directives of the Department as they may be in effect from time to time.

In consideration of the funds granted pursuant to this contract and for other good and valuable consideration, the Department, and the Authority agree that the (CFA) for the development(s) described herein as it may have been heretofore amended, shall be extended for an additional period of forty (40) years provided that the extended period, when combined with the unexpired term(s) of the existing CFA(s) and amendment(s) thereto, shall not exceed forty (40) years from the completion of the Capital Improvement Work funded under this contract. During such extension period the Authority agrees to use the development(s) as a housing project providing low rent housing as provided by the terms of the CFA(s) and of any amendment(s) thereto, Chapter 121B, the Departments regulations and the written directives of the Department as they may be in effect from time to time. This paragraph amends the said CFA(s) and shall continue in full force and effect for the term(s) of the extensions(s) specified herein. This paragraph has legal effect as part of the CFA with respect to such extensions(s) and shall not be subject to further amendment except as part of the CFA as therein provided.

4. Approval of Contracts, Expenditures and Settlements. The Authority agrees, that with respect to implementation of the Work Plan/Approved Budget, it shall submit all bid documents, including plans and specifications, to the Department for its approval. The Authority further agrees that it shall not without prior written approval of the Department:

(a) enter into any contract for services or for the purchase of material or equipment pursuant to the Work Plan/Approved Budget.

(b) issue any change order in connection with any contract;

(c) make any expenditure for capital improvement not specifically authorized in the Work Plan/Approved Budget approved by the Department;

(d) release any sums retained pending final inspection and certification of satisfactory completion pursuant to any contract under (a) above; or

(e) approve any settlement of any matter in litigation.

5. Compliance With Bidding Requirements. The Authority shall comply with the requirements of all applicable statutes and regulations, governing competitive bidding procedures, prior to the award of any contract pursuant to the Work Plan/Approved Budget.

6. Bonding and Insurance Requirements. The Authority shall require its contractors to provide such security for the full and faithful performance of any contract or subcontract by way of a surety company licensed to do business in the Commonwealth, as the Department may prescribe. The Authority shall require from its contractor(s) and shall itself maintain insurance of such kinds and in such amounts as the Department may prescribe.

7. Supervision, Inspection and Review. The Authority agrees that it shall diligently enforce the terms of its contract(s) with contractor(s) performing work hereunder, and shall carry out the supervision and inspection of each contractor's work to ensure that it is completed in accordance with applicable specifications. The Authority shall conduct such supervision in a professional manner and to the satisfaction of the Department. The Authority shall permit the Department and authorized representatives to review all work and supervision of work by the Authority, materials, payrolls, records of personnel, conditions of employment, invoices of materials, books of account and other data and records in connection with the execution of the Work Plan/Approved Budget which the Department shall require, and shall require each contractor to allow such access to the contractor's relevant records by the Department.

8. Reports. The Authority shall provide reports in such form and with such frequency as the Department shall require from time to time regarding all aspects of the modernization of the development. These reports shall include: (a) the progress of the work; (b) the actual capital improvement cost incurred by the Work Plan/Approved Budget, breaking out all costs in such manner as the Department may prescribe; (c) certification by appropriate authorities as specified by the Department that the Work Plan/Approved Budget has been completed free from defects or inadequacies; and (d) that the Authority has been discharged from all liability in connection with the modernization of the development(s) through the payment or setting aside of monies and that the development(s) is/are free from any claims or obligations under sections 28 and 29 of Chapter 149 of the General Laws.

9. Separate Accounts; Rights of Commonwealth with Respect to Bank Accounts of Authority. The Authority shall at all times conduct its business and affairs in such manner that any bank accounts relative to modernization of the development under this contract will be separate and distinct from any account of the Authority relative to any other enterprise developed, administered, or engaged in by the Authority. The Authority shall, at the time of opening any account with any bank, obtain an agreement with such bank that (1) upon the receipt of any direction from the Department, no further withdrawal by the Authority shall take place; (2) that such bank shall agree with the Department that the bank shall forthwith comply with such direction unless and until revoked by the Department; and (3) that a withdrawal of the funds duly authorized and signed by the Department will be honored by such bank.

The Authority agrees that if either one or both of the following events occur and is not corrected or remedied to the satisfaction of the Department, the Department shall have the right to direct any bank with which the Authority maintains an account in which funds for the modernization of the development(s) are deposited or held, to refuse to permit any withdrawals from such account until further notice from the Department: (a) the Authority shall have defaulted in the observance or performance of any one or more of the terms, covenants or conditions of this contract; (b) the Authority shall have made any misrepresentation of material fact in any of the certificates, reports, statements or other documents or dates required to be submitted pursuant to this contract. Additionally, upon the occurrence of one or more such events, the Department may withdraw funds from such account when necessary to make any expenditure properly chargeable to the Work Plan. Such funds shall be applied by the Department in accordance with the applicable provisions and requirements of this contract.

10. Accounts, Records, Books and Audits. The Authority agrees that it shall (a) maintain such accounts, records, and books in accordance with any specifications which the Department may prescribe as to the manner and form of record-keeping and as to the contents of the records; (b) grant to the employees or representatives of the Department at all times during normal business hours and as often as the Department may require, full and free access to its accounts, records and books; (c) permit the Department or any accountants or auditors approved by the Department and the authorized representatives of the State Auditor's Office to make periodic audits, excerpts or transcripts of the accounts, financial records and books of the Authority; (d) furnish to the Department such financial, operating, statistical and other reports, records, statements, and documents in such manner and form as may be required by the Department; and (e) furnish copies of contracts of the Authority and other documents in the possession of the Authority as the Department may require from time to time.

11. Notices and Demands. Any notice or demand permitted or required under this contract to be given or served by either of the parties hereto upon the other party hereto shall be in writing and shall be signed in the name of the party giving or serving the same. Such notice or demand shall be mailed by certified mail, postage and certified charges prepaid, or personally served on the Department or the Executive Director of the Authority. For purposes of this section, the Department shall be notified at the Bureau of Housing Development and Construction, Executive Office of Housing and Livable Communities, 100 Cambridge Street, Boston, Massachusetts 02114, or such other place as the Department may designate by written notice to the Authority.

12. Termination or Suspension of Contract. The Department may suspend or terminate all or part of this contract at any time if it, in its sole discretion, determines that suspension or termination is warranted because of the violation by the Authority of any provisions of this contract or of the regulations of the Department or applicable law. The Department may terminate or suspend all or part of this contract in order to correct misuse or misapplication of funds by the Authority. Failure to implement the Work Plan/Approved Budget in accordance with the dates set forth in Exhibit 1 shall constitute grounds for the immediate termination or suspension of this contract. In any case of termination or suspension, notice in writing of the action shall be given to the Authority. The Department may also terminate or suspend this contract at any time due to the unavailability of the required funds as described in Section 1 of this Attachment.

13. Severability of Provisions. If any provision of this contract is held invalid, the remainder thereof shall not be affected thereby; and all other parts thereof shall remain in full force and effect.

14. Enforcement of Contract. The Department may enforce any of its orders, rules or regulations or the provisions of this contract, or remedy any breach of this contract, by filing an action in the Superior Court or other court of competent jurisdiction.

15. Interest of Member or Employee of Authority. No member or employee of the Authority shall participate in any decision relating to the Work Plan/Approved Budget affecting his or her personal interests or the interest of any corporation, partnership, proprietorship in which he or she is directly or indirectly interested. No member, officer, agent, servant or employee of the Authority or of the city or town in which the development is located, shall have any interest, direct or indirect, in any contract for property, materials, or services to be acquired by the Authority or furnished for use in connection with the Work Plan/Approved Budget.

No member of the Authority shall be paid for his or her services or receive compensation as such member out of the proceeds of funds received in connection with the Work Plan/Approved Budget.

16. Member of Authority not Individually Liable. No member or officer of the Authority shall be individually liable on any obligation assumed by the Authority hereunder, except that this provision shall not be deemed to relieve such officer or member from any liability incurred for his or her fraud or other intentional misconduct.

17. Equal Employment Opportunity. In its implementation of the Work Plan/Approved Budget, as set out in Section 10 of the Commonwealth Terms and Conditions, the Authority shall not discriminate against any employee or applicant for employment because of race, creed, color, national origin, sex, sexual orientation, age, or disability. The Authority shall take affirmative action to encourage applications from minorities, individuals with disabilities, and women and to ensure that applicants are employed and that employees are treated during employment, without regard to their race, creed, color, national origin, sex, sexual orientation, age or disability.

The Authority shall in all solicitations or advertisements for employees placed by, or on behalf of the Authority, state that all qualified applicants shall receive consideration for employment without regard to race, creed, color, national origin, sex, sexual orientation, age, or disability. Except as required in the following paragraph, the Authority shall incorporate the foregoing requirements in all of its contracts for work items under the Work Plan/Approved Budget and shall require its contractors to place such terms in all subcontracts.

The Authority shall incorporate into bid specifications and contracts for state-aided modernization and reconstruction work, as directed by the Department, provisions for the award of contracts to Minority and Women Business Enterprises as certified by the State Office of Minority, Women Business Assistance, (SOMWBA).

18. Non-Exclusivity of Remedies. Termination for cause in the event of breach of this contract by Contractor is a non-exclusive remedy available to the Department.

19. Disbursement of Grants. Grants by the Commonwealth hereunder shall be disbursed periodically upon request by the Authority and approval by the Department. Approval by the Department shall be in accordance with the budget in the Work Plan/Approved Budget (Exhibit hereto).

Prior to the disbursement of any portion of the maximum obligation, the Department may review compliance by the Authority with the approved Work Plan/Approved Budget. If the Department finds, in its sole discretion, that the actual cost will exceed the budget, or that the Work Plan/Approved Budget is not being adhered to, it may withhold disbursement of payment until it is satisfied that the Work Plan/Approved Budget will be followed. The Department may in its discretion adjust the scope of the work item(s) and the budget as a condition of any subsequent approval of a request for a grant.

Interest earned on funds granted shall be used by the Authority to pay the cost of the approved work items or at the option of the Department shall be returned to the Department.

Executed as an instrument under seal.

EXECUTIVE OFFICE OF HOUSING AND LIVABLE COMMUNITIES
258025001, CFA Number 258025001, Amendment 21
Summary of LHA Capital Project Budget/Changes

Line Number	Description	Prior Budget	Change +/-	Revised Budget
Construction				
1450.01	Original Construction Contract	23,032,217.74	125,000.00	23,157,217.74
1450.02	Change Order Contingency	0.00	0.00	0.00
1450.03	Permit Fees	0.00	0.00	0.00
SubTotal Construction		23,032,217.74	125,000.00	23,157,217.74
CFA TOTAL:		23,032,217.74	125,000.00	23,157,217.74

Executive Office of Housing and Livable Communities

Project: **Salem 5001**

Description: Formula Funding

LINE ID	OUTLINE	PROJECT PHASE /TASK	DURATION DAYS	SCH START	SCH FIN
1	1		9635	6/10/2010	6/30/2035
2	1.1	STUDY	30	8/6/2010	12/15/2016
3	1.1.1	EOH&LC approves funding/award	200	1/14/2017	8/2/2017
4	1.2	PLANNING	200	8/2/2017	2/18/2018
5	1.2.1	Assign in-house A/E	5	2/18/2018	2/23/2018
6	1.2.2	EOH&LC approves RFS/WO	20	2/18/2018	3/10/2018
7	1.3	DESIGNER SELECTION	20	2/28/2018	3/20/2018
8	1.3.1	EOH&LC approves A/E contract	20	2/28/2018	3/20/2018
9	1.4	CONCEPTS	20	2/28/2018	3/20/2018
10	1.4.1	EOH&LC approves concepts	20	2/28/2018	3/20/2018
11	1.5	SCHEMATICS	60	3/20/2018	5/19/2018
12	1.5.1	EOH&LC approves schematics	60	3/20/2018	5/19/2018
13	1.6	DESIGN DEVELOPMENT	20	5/19/2018	5/19/2018
14	1.6.1	EOH&LC approves DD	20	5/19/2018	6/8/2018
15	1.7	CONSTRUCTION DOCS.	20	6/8/2018	6/28/2018
16	1.7.1	EOH&LC approval to bid	10	6/28/2018	7/8/2018
17	1.8	BIDDING	30	7/8/2018	8/7/2018
18	1.8.1	General bids opened	30	7/8/2018	8/7/2018
19	1.8.2	EOH&LC approves GC contract	10	8/7/2018	8/17/2018
20	1.9	CONSTRUCTION	2095	10/6/2018	7/1/2024
21	1.9.1	NTP Issued	50	8/17/2018	10/6/2018
22	1.9.2	Contract time for completion	1095	10/6/2018	10/5/2021
23	1.9.3	Amended time for completion	1000	10/5/2021	7/1/2024
24	1.9.4	Forecasted construction period	2095	1/3/2017	9/29/2022
25	1.9.5	EOH&LC approves CSC	10	9/19/2022	9/29/2022
26	1.10	CLOSE-OUT	5	9/29/2022	10/4/2022
27	1.10.1	EOH&LC approves CFC	5	9/29/2022	10/4/2022
28	1.11	WARRANTY	1425	10/4/2022	6/30/2024
29	1.11.1	9 month warranty inspection	635	10/4/2022	6/30/2024
30	1.11.2	End of warranty period	425	5/1/2024	6/30/2035

Exhibit 2 - Projected Timetable for Completion of Work

CERTIFICATE OF SUBSTANTIAL COMPLETION
COMMONWEALTH OF MASSACHUSETTS
EXECUTIVE OFFICE OF HOUSING AND LIVABLE COMMUNITIES

Contractor	<u>[Drizos Contracting, LLC]</u>	Owner	<u>Salem</u>	Housing Authority
Street:	<u>101 Middlesec Turnpike Suite 6</u>	Street:	<u>27 Charter Street</u>	
	<u>#353</u>			
City, State, Zip:	<u>Burlington, MA, 01803</u>	City, State, Zip:	<u>Salem, MA 01970</u>	
Telephone:	<u>978-460-2241</u>	Telephone:	<u>978-744-4431</u>	
Fax:		Fax:	<u>978-744-9614</u>	
Development No	<u>(705-03)</u>	PROJECT No:	<u>r/258187</u>	
Contract for:	<u>ARPA FF: Selective siding</u> <u>[replacement]</u>			

Pursuant to the General, Supplementary, and Special Conditions of the Contract Documents relative to Partial or Total Occupancy, you are hereby notified that the Housing Authority has satisfied itself that the portion(s) of the above mentioned project, as hereinafter enumerated, is (are) ready for use and or occupancy:

Identify the Buildings and/or areas to be occupied and or used: All Buildings

The Housing Authority, through its undersigned representative hereby accepts from the Contractor, subject to contract stipulations, said portion(s) of the Project, effective 12:00 Noon on the: (Nineteenth) day of August, 2025

The Contractor will be relieved of responsibility for performing further Work or supplying further materials, equipment, or other items, in accordance with the General, Supplementary, and Special Conditions of the Contract Documents (relative to partial or total occupancy), except for the following work:

Append a complete list of all incomplete and/or unsatisfactory items of the Work, which in the opinion of this Housing Authority, are attributable to the fault, negligence, or oversight of the Contractor, any subcontractors, material suppliers, agents, servants, or employees.

NOTE: Attach one copy of the "Punch List" Items to each copy of this document.

- The Use or Occupancy of the building(s) or portion(s) of this project by the Housing Authority shall **not**:
- constitute acceptance of any Work not performed in accordance with the Contract Documents;
 - relieve the Contractor of the liability to perform any Work required by the Contract but not completed at the time of Use and or Occupancy; nor
 - relieve the Contractor of liabilities with respect to any express warranties or guarantees required by the Contract.

CERTIFICATION OF HOUSING AUTHORITY BOARD VOTE **Must be completed by the Owner**
 The Salem Housing Authority met on TBD And voted to approve this Certificate:
 Certified By: _____, Contract Officer

Approved: Architect, Andrew M. Brockway & Associates
 By: Andrew Brockway Date: 10/09/2025

Accepted: Contractor, Drizos Contracting, LLC
 By: Nickolaos Drizos Date: 10/14/2025

Reviewed: Construction Advisor, Executive Office of Housing and Livable Communities
 By: _____ Date: _____

Approved: Director Construction Management Unit, Executive Office of Housing and Livable Communities
 By: _____ Date: _____

A N D R E W M B R O C K W A Y
& A s s o c i a t e s

209 Parker Street
978 793-1550

Acton, MA 01720
www.brockwayarch.com

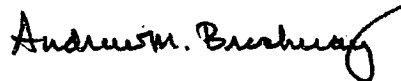
To: Angelo Tamburello
Drizos Contracting, LLC
Project Manager
Boston Road, Unit 5B
Billerica, MA 01821

Date: August 20, 2025

Project: Salem Housing Authority
Farrell Court (200-1)
Exterior Siding & Window Replacement
EOHLC No. 258187

RE: ~~Punch List, Dated 8.19.2025~~

- Building 17 & Building 21: Reinstall exterior lights at gable end of building
- Building 17: Re-bend aluminum flashing over electrical meter so it is more or less flush with the top of the meter box.



Andrew M. Brockway, AIA

Cc: Debbie Tucker, Salem Housing
Gary Dean, Salem Housing

ANDREW M. BROCKWAY
& Associates

209 Parker Street
978 793-1550

Acton, MA 01720
www.brockwayarch.com



Building 17: Reinstall light / Re-bend aluminum flashing over meter box



Building 21: Reinstall light

ANDREW M. BROCKWAY
& Associates

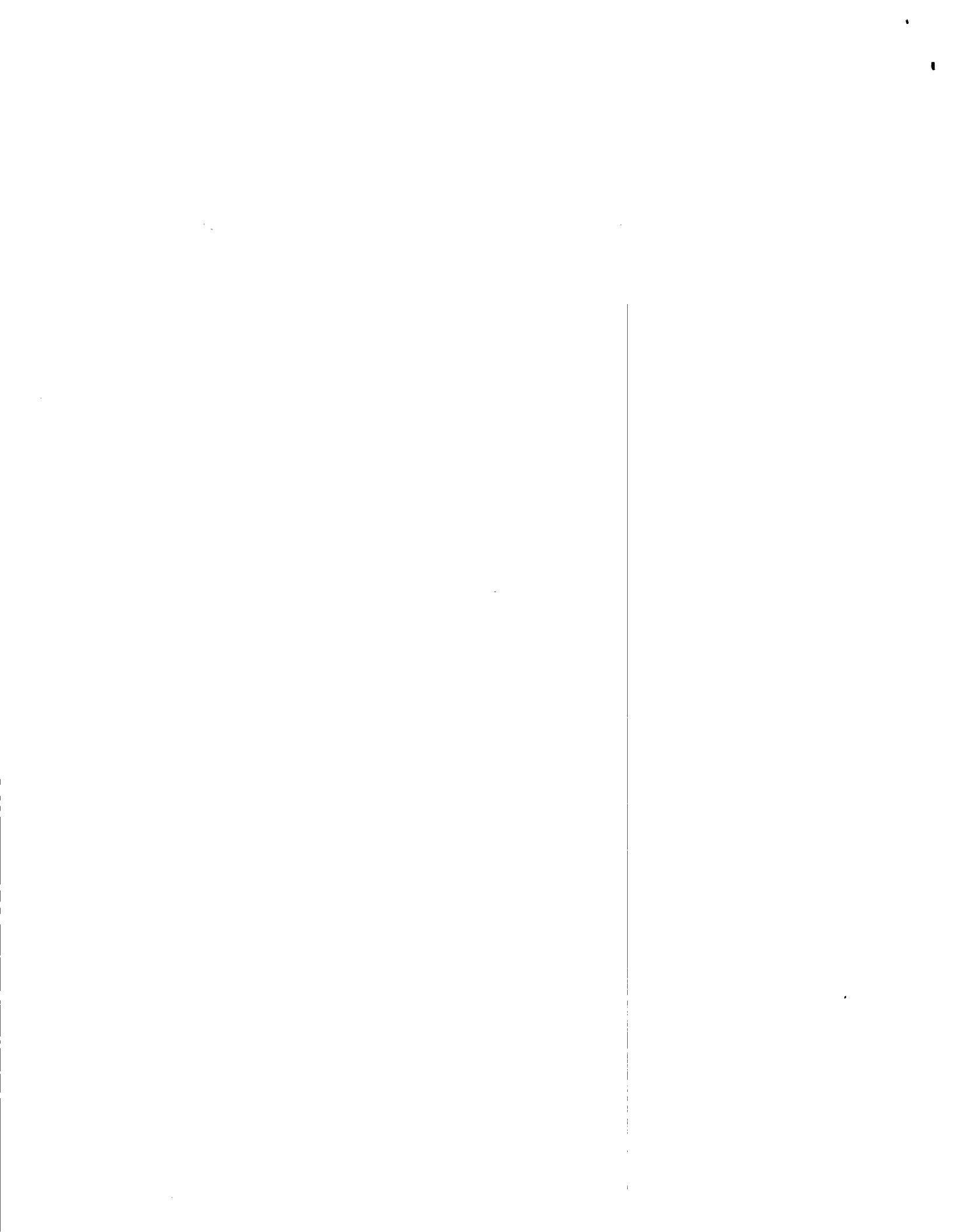
209 Parker Street
978 793-1550

Acton, MA 01720
www.brockwayarch.com

Some record images of construction as of 8.18.25



Building 19 Front



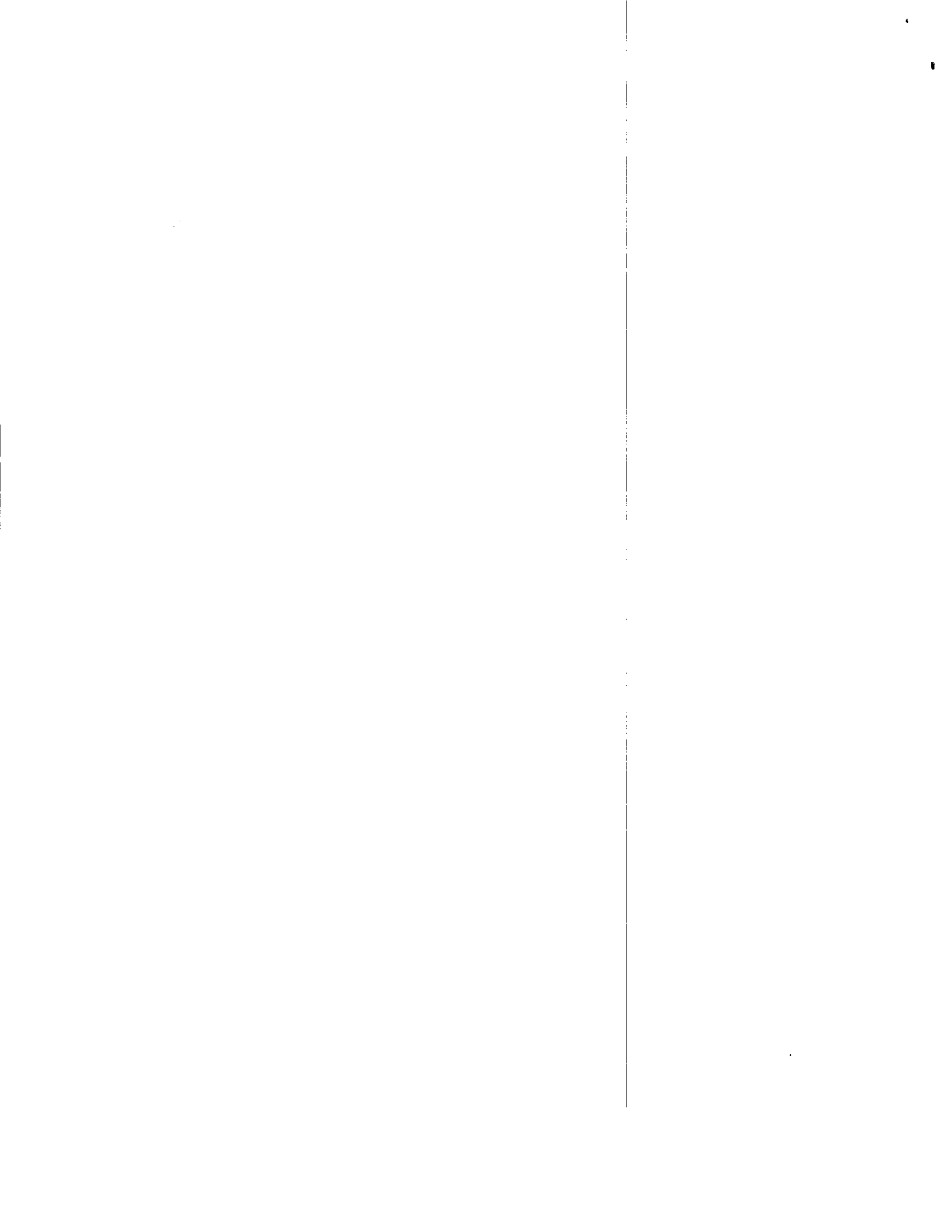
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& Associates

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Building 17 Rear



ANDREW M BROCKWAY
& Associates

209 Parker Street
978 793-1550

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Building 19 Rear



Building 21 Rear

ANDREW M. BROCKWAY
& Associates

209 Parker Street
978 793-1550

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Building 21 Side



ANDREW M BROCKWAY
& Associates

209 Parker Street
978 793-1550

Acton, MA 01720
www.brockwayarch.com

Building 17 Side





Jacqueline
Guzman
(MS3559)

PIC Main

Assessment
Profile

Reports

List

Summary

Certification

Profile

Comments

Field Office: **1APH BOSTON HUB OFFICE**
Housing Agency: **MA055 Salem Housing Authority**
PHA Fiscal Year End: **9/30/2025**

SEMAP

Logoff

OMB Approval No. 2577-0215

SEMAP CERTIFICATION (Page 1)

Public reporting burden for this collection of information is estimated to average 12 hours per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. This agency may not conduct or sponsor, and you are not required to respond to, a collection of information unless it displays a currently valid OMB control number.

This collection of information is required by 24 CFR sec 985.101 which requires a Public Housing Agency (PHA) administering a Section 8 tenant-based assistance program to submit an annual SEMAP Certification within 60 days after the end of its fiscal year. The information from the PHA concerns the performance of the PHA and provides assurance that there is no evidence of seriously deficient performance. HUD uses the information and other data to assess PHA management capabilities and deficiencies, and to assign an overall performance rating to the PHA. Responses are mandatory and the information collected does not lend itself to confidentiality.

Check here if the PHA expends less than \$300,000 a year in federal awards

Indicators 1 - 7 will not be rated if the PHA expends less than \$300,000 a year in Federal awards and its Section 8 programs are not audited for compliance with regulations by an independent auditor. A PHA that expends less than \$300,000 in Federal awards in a year must still complete the certification for these indicators.

Performance Indicators

1 Selection from Waiting List (24 CFR 982.54(d)(1) and 982.204(a))

a. The HA has written policies in its administrative plan for selecting applicants from the waiting list.

PHA Response Yes No

b. The PHA's quality control samples of applicants reaching the top of the waiting list and admissions show that at least 98% of the families in the samples were selected from the waiting list for admission in accordance with the PHA's policies and met the selection criteria that determined their places on the waiting list and their order of selection.

PHA Response Yes No

2 Reasonable Rent (24 CFR 982.4, 982.54(d)(15), 982.158(f)(7) and 982.507)

a. The PHA has and implements a reasonable written method to determine and document for each unit leased that the rent to owner is reasonable based on current rents for comparable unassisted units (i) at the time of initial leasing, (ii) before any increase in the rent to owner, and (iii) at the HAP contract anniversary if there is a 5 percent decrease in the published FMR in effect 60 days before the HAP contract anniversary. The PHA's method takes into consideration the location, size, type, quality, and age of the program unit and of similar unassisted units and any amenities, housing services, maintenance or utilities provided by the owners.

PHA Response Yes No

b. The PHA's quality control sample of tenant files for which a determination of reasonable rent was required to show that the PHA followed its written method to determine reasonable rent and documented its determination that the rent to owner is reasonable as required for (check one):

PHA Response **At least 98% of units sampled** **80 to 97% of units sampled**
 Less than 80% of units sampled

3 Determination of Adjusted Income (24 CFR part 5, subpart F and 24 CFR 982.516)

The PHA's quality control sample of tenant files show that at the time of admission and reexamination, the PHA properly obtained third party verification of adjusted income or documented why third party verification was not available; used the verified information in determining adjusted income; properly attributed allowances for expenses; and, where the family is responsible for utilities under the lease, the PHA used the appropriate utility allowances for the unit leased in determining the gross rent for (check one):

PHA Response **At least 90% of files sampled** **80 to 89% of files sampled**
 Less than 80% of files sampled

4 Utility Allowance Schedule (24 CFR 982.517)

The PHA maintains an up-to-date utility schedule. The PHA reviewed utility rate data that it obtained within the last 12 months, and adjusted its utility allowance schedule if there has been a change of 10% or more in a utility rate since the last time the utility allowance schedule was revised.

PHA Response **Yes** **No**

5 HQS Quality Control (24 CFR 982.405(b))

The PHA supervisor (or other qualified person) reinspected a sample of units during the PHA fiscal year, which met the minimum sample size required by HUD (see 24 CFR 985.2), for quality control of HQS inspections. The PHA supervisor's reinspected sample was drawn from recently completed HQS inspections and represents a cross section of neighborhoods and the work of cross section of inspectors.

PHA Response **Yes** **No**

6 HQS Enforcement (24 CFR 982.404)

The PHA's quality control sample of case files with failed HQS inspections shows that, for all cases sampled, any cited life-threatening HQS deficiencies were corrected within 24 hours from the inspection and, all other cited HQS deficiencies were corrected within no more than 30 calendar days from the inspection or any PHA-approved extension, or, if HQS deficiencies were not corrected within the required time frame, the PHA stopped housing assistance payments beginning no later than the first of the month following the correction period, or took prompt and vigorous action to enforce the family obligations for (check one):

PHA Response **At least 98% of cases sampled** **Less than 98% of cases sampled**

7 Expanding Housing Opportunities.

(24 CFR 982.54(d)(5), 982.153(b)(3) and (b)(4), 982.301(a) and 983.301(b)(4) and (b)(12))

Applies only to PHAs with jurisdiction in metropolitan FMR areas

Check here if not applicable

a. The PHA has a written policy to encourage participation by owners of units outside areas of poverty or minority concentration which clearly delineates areas in its jurisdiction that the PHA considers areas of poverty or minority concentration, and which includes actions the PHA will take to encourage owner participation.

PHA Response **Yes** **No**

b. The PHA has documentation that shows that it took actions indicated in its written policy to encourage participation by owners outside areas of poverty and minority concentration.

PHA Response **Yes** **No**

c. The PHA has prepared maps that show various areas, both within and neighboring its jurisdiction, with housing opportunities outside areas of poverty and minority concentration; the PHA has assembled information about job opportunities, schools and services in these areas; and the PHA uses the maps and related information when briefing voucher holders.

PHA Response Yes No

d. The PHA's information packet for certificate and voucher holders contains either a list of owners who are willing to lease, or properties available for lease, under the voucher program, or a list of other organizations that will help families find units and the list includes properties or organizations that operate outside areas of poverty or minority concentration.

PHA Response Yes No

e. The PHA's information packet includes an explanation of how portability works and includes a list of neighboring PHAs with the name, address and telephone number of a portability contact person at each.

PHA Response Yes No

f. The PHA has analyzed whether voucher holders have experienced difficulties in finding housing outside areas of poverty or minority concentration and, where such difficulties were found, the PHA has considered whether it is appropriate to seek approval of exception payment standard amounts in any part of its jurisdiction and has sought HUD approval when necessary.

PHA Response Yes No

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Assessment Profile Reports

Jacqueline Guzman (MS3559)
PIC Main

List Summary Certification Profile Comments
Field Office: **1APH BOSTON HUB OFFICE**
Housing Agency: **MA055 Salem Housing Authority**
PHA Fiscal Year End: **9/30/2025**

SEMAP

SEMAP CERTIFICATION (Page 2)

Logoff

Performance Indicators

8 Payment Standards(24 CFR 982.503)

The PHA has adopted current payment standards for the voucher program by unit size for each FMR area in the PHA jurisdiction and, if applicable, for each PHA-designated part of an FMR area, which do not exceed 110 percent of the current applicable FMR and which are not less than 90 percent of the current FMR (unless a lower percent is approved by HUD). (24 CFR 982.503)

PHA Response Yes No

FMR Area Name Boston-Cambridge-Quinc

FMR 1 of 2



Enter current FMRs and payment standards (PS)

0-BR FMR 2263	1-BR FMR 2394	2-BR FMR 2837	3-BR FMR 3418	4-BR FMR 3761
PS 2263	PS 2394	PS 2837	PS 3418	PS 3761

If the PHA has jurisdiction in more than one FMR area, and/or if the PHA has established separate payment standards for a PHA-designated part of an FMR area, add similar FMR and payment standard comparisons for each FMR area and designated area.

9 Timely Annual Reexaminations(24 CFR 5.617)

The PHA completes a reexamination for each participating family at least every 12 months.(24 CFR 5.617)

PHA Response Yes No

10 Correct Tenant Rent Calculations(24 CFR 982, Subpart K)

The PHA correctly calculates tenant rent in the rental certificate program and the family rent to owner in the rental voucher program (24 CFR 982,Subpart K)

PHA Response Yes No

11 Pre-Contract HQS Inspections(24 CFR 982.305)

Each newly leased unit passes HQS inspection before the beginning date of the assisted lease and HAP contract.(24 CFR 982.305)

PHA Response Yes No

12 Continuing HQS Inspections(24 CFR 982.405(a))

The PHA inspects each unit under contract as required (24 CFR 982.405(a))

PHA Response Yes No

13 Lease-Up

The PHA executes assistance contracts on behalf of eligible families for the number of units that has been under budget for at least one year. The PHA executes assistance contracts on behalf of eligible families for the number of units that has been under budget for at least one year

PHA Response Yes No

14 Family Self-Sufficiency (24 CFR 984.105 and 984.305)

14a.Family Self-Sufficiency Enrollment. The PHA has enrolled families in FSS as required. Applies only to PHAs required to administer an FSS program.

Check here if not applicable

a. Number of mandatory FSS slots (Count units funded under the FY 1992 FSS incentive awards and in FY 1993 and later through 10/20/1998. Exclude units funded in connection with Section 8 and Section 23 project-based contract terminations; public housing demolition, disposition and replacement; HUD multifamily property sales; prepaid or terminated mortgages under section

236 or section 221(d)(3); and Section 8 renewal funding. Subtract the number of families that successfully completed their contracts on or after 10/21/1998.)

Or, Number of mandatory FSS slots under HUD-approved exception (If not applicable, leave blank) 0

b. Number of FSS families currently enrolled 30

c. Portability: If you are the initial PHA, enter the number of families currently enrolled in your FSS program, but who have moved under portability and whose Section 8 assistance is administered by another PHA 0

Percent of FSS slots filled (b+c divided by a) (This is a nonenterable field. The system will calculate the percent when the user saves the page) 0

14b. Percent of FSS Participants with Escrow Account Balances. The PHA has made progress in supporting family self-sufficiency as measured by the percent of currently enrolled FSS families with escrow account balances. (24 CFR 984.305)

Applies only to PHAs required to administer an FSS program

Check here if not applicable

PHA Response Yes No

Portability: If you are the initial PHA, enter the number of families with FSS escrow accounts currently enrolled in your FSS program, but who have moved under portability and whose Section 8 assistance is administered by another PHA 0

15 Deconcentration Bonus

The PHA is submitting with this certification data which show that :

(1) Half or more of all Section 8 families with children assisted by the PHA in its principal operating area resided in low poverty census tracts at the end of the last PHA FY;

(2) The percent of Section 8 mover families with children who moved to low poverty census tracts in the PHA's principal operating area during the last PHA FY is atleast two percentage points higher than the percent of all Section 8 families with children who resided in low poverty census tracts at the end of the last PHA FY; or

(3) The percent of Section 8 mover families with children who moved to low poverty census tracts in the PHA's principal operating area over the last two PHA FY is at least two percentage points higher than the percent of all Section 8 families with children who resided in low poverty census tracts at the end of the second to last PHA FY.

PHA Response Yes No

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