

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

**DISCUSSIONS FOR THE
REGULAR MEETING
WEDNESDAY, FEBRUARY 12, 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,
January 8, 2025. () seconds the motion and the vote is as follows:

Ayes

Nays

() moves to accept the Minutes of the Special Regular Meeting held on Wednesday,
January 29, 2025. () seconds the motion and the vote is as follows:

Ayes

Nays

IV. Tenant/Public Engagement

V. Executive Director Report

VI. Communications

- Updated Waitlist



- SHA Department Reports (Move In, Move Out, State and Federal, CHAMP Report, Modernization Report, Voucher Report, Family Self-Sufficiency Program Report (Quarterly), Resident Service Coordinator Reports and Completed Work Orders for Month of January 2025)
- Section 8 Management Assessment Program (SEMAP) Score
The over all Section 8 Management Assessment Program score is 99%. The Authority is designated as a High Performer-
- News Release from PureSky Energy – January 13, 2025
- Job Fair, Saturday, March 8th, 2025, 136 Canal Street, Suite #2, Salem, MA
Leefort Terrace, Salem, MA Callahan Construction

VII. Reports of the Committees

VIII. Recommendations of the Chair

IX. Report of the Treasurer

Bills and Transfers

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

Ayes

Nays

Balance Sheet and Statements of Revenues and Expenses

() moves to accept the Balance Sheet and Statements of Revenues and Expenses prepared by Rick Fenton of Fenton, Ewald & Associates, P.C. for three (3) months ending December 31, 2024. () seconds the motion and the **roll call** vote is as follows:

Ayes

Nays

X. Unfinished Business

Review/Approve Consultant for Strategic Planning/Code of Conduct (3 quotes attached)

() moves to approve the consultant firm of _____ to assist the Salem Housing Authority in Strategic Planning and the drafting of a Code of Conduct for the Board of Directors. () seconds the motion and the **roll call** vote is as follows:

Ayes

Nays

Code of Interpersonal Conduct for the Board of Commissioners of the Salem Housing Authority

The Chair will send out under separate cover prior to the Board Meeting.

() moves to approve the Code of Interpersonal Conduct for the Board of Commissioners of the Salem Housing Authority as presented. () seconds the motion and the roll call vote is as follows:

Ayes

Nays

Transcript of the Regular Board of Directors Meeting of August 14, 2024 Prepared by Magna Legal Services

Cathy Hoog will present to the Board of Directors the Transcript of the Regular Board of Directors Meeting of August 14, 2024 prepared by Magna Legal Services for review and approval.

() moves to approve the transcript of the Regular Board of Directors Meeting of August 14, 2024 prepared by Magna Legal Services. () seconds the motion and the **roll call** vote is as follows:

Ayes

Nays

Executive Director Evaluations

The Chair will send under separate cover prior to the Board Meeting.

XI. New Business

Budget Presentation – Fiscal Year Ending September 30, 2025

Paul Pavia, Certified Public Accountant, from Fenton, Ewald & Associates, P.C. will present in detail the State 4001 and MRVP/DMH budgets for fiscal year ending September 30, 2025.

() moves to approve the **MRVP/DMH** Budget for fiscal year ending September 30, 2025. () seconds the motion and the **roll call** vote is as follows:

Ayes

Nays

() moves to approve the **Program 4001** Budget for fiscal year ending September 30, 2025. () seconds the motion and the **roll call** vote is as follows:

Ayes

Nays

Executive Director Calculation Sheet

Cathy Hoog will present to the Board, the Executive Director's Salary Calculation Sheet to the Board of Directors.

() moves to approve the Executive Director's Salary Calculation Sheet as presented. () seconds the motion and the **roll call** vote is as follows:

Ayes

Nays

Certificate of Final Completion and Final Payment for EOHLC Project 258162 Gateway Cities Walkways, Landscaping, etc.

() moves to approve the Certificate of Final Completion and Final payment in the amount of \$19,506.03 as presented by Site Improvements, Inc. and approved by the engineer, Beals and Thomas, Inc. for EOHLC project 258162 Gateway Cities Walkways, Landscaping, etc. () seconds the motion and the **roll call** vote is as follows:

Ayes

Nays

Bid – EOHLC Project 258187 Exterior Siding and Window Replacement at Farrell Court, 705-3 G

Cathy Hoog will present to the Board Bid for EOHLC Project 258187 Exterior Siding and Window Replacement at Farrell Court, 705-3 G for approval.

() moves to accept the low bid of \$278,000.00 from Drizos Contracting LLC for EOHLC project 258187 Exterior Siding and Window Replacement at Farrell Court, 705-3 pending approval by EOHLC. () seconds the motion and the **roll call** vote is as follows:

Ayes

Nays

Grant Application for State Self Sufficiency Program For Public Housing Families in Salem and Marblehead

Cathy Hoog will present the Grant Application for State Self Sufficiency Program For Public Housing Families in Salem and Marblehead for approval by the Board.

() moves to approve the Grant Application for State Self Sufficiency Program For Public Housing Families in Salem and Marblehead as presented. () seconds the motion and the role call vote is as follows:

Ayes

Nays

Grant Application for Vacant Unit Turnover Task Force

Cathy Hoog will present the Grant Application for Vacant Unit Turnover Task Force for approval by the Board.

() moves to approve the Grant Application for Vacant Unit Turnover Task Force as presented. () seconds the motion and the role call vote is as follows:

Ayes

Nays

Salem Housing Authority Five-Year Public Housing Agency Plan for Fiscal Year 2024

The Salem Housing Authority Five -Year Public Housing Agency Plan for Fiscal Year 2024 is for the Board to review and will be voted on at the March 2025 Regular Board Meeting.

Resolution on Public Comment Participation

The Chair will send out under separate cover prior to the Board Meeting.

XII. Other Business/Late Communications

XIII. Adjournment

() moves that the Board convene into Executive Session at p.m. to Discuss whether certain Executive Session Minutes should be released relative to the following purposes:

1. To conduct strategy session in preparation for negotiations with nonunion personnel or to conduct collective bargaining sessions or contract negotiations with nonunion personnel.
2. To discuss strategy with respect to collective bargaining or litigation if an open meeting may have a detrimental effect on the bargaining or litigating position of the public body and the chair so declares.
3. To discuss the reputation, character, physical condition or mental health of an individual or discuss discipline, dismissal, complaints or charges brought against a public officer, employee, staff member, or individual.

The Board of Directors will not reconvene into Open Session and will adjourn the meeting from Executive Session.

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

Ayes

Nays



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**MINUTES FOR THE
REGULAR MEETING
WEDNESDAY, JANUARY 8, 2025
6:00 p.m.**

I. Call Meeting to Order at 6:04 p.m.

II. Roll Call

Present

Veronica Miranda
Carly McClain
Aaron Paternoster
Doneeca Thurston-Chavez

Absent

Romell Kidd arrived at 7:22 p.m.

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

Veronica Miranda opened the floor for public comment and encouraged participants to use the raise hand feature if they wished to speak. The meeting was recorded and Spanish interpretation was available for those who needed it. The minutes of the previous meeting were discussed, with no questions or concerns raised. The agenda then moved on to tenant/public engagement.

III. Minutes of Previous Meeting(s)

Doneeca Thurston-Chavez moved to accept the Minutes of the Special Meeting held on Wednesday, December 18, 2024 Aaron Paternoster seconded the motion and the roll call vote was as follows:

Ayes

Veronica Miranda
Carly McClain
Aaron Paternoster
Doneeca Thurston-Chavez

Nays



IV. Tenant/Public Engagement

Sue Kirby – Morency Manor, 205 Bridge Street, Salem, MA commented as follows: Good evening.. There are two things I want to say about the strategic planning. One is, I really really think it's important to involve tenants in that process. Not just housing, not just the board, not just the employees, particularly the you know, and maybe that makes total sense. I don't know how they would do that. I think it would be helpful to have a few people who are part of that group that's actually meeting regularly. I also think it would be good to use that process as part of that process to be reaching out to tenants in a broad way to ask them questions about how they are impacted by various things. So, I just wanted to make sure I said that.the other thing that I just want to bring up and it's not particularly relative to strategic planning, although I should think it will ultimately be important.. The more I hear about it, the more it seems like there's a strategy now of actually inviting nonprofits for profit, making organizations in to take over public housing, thinking that you know in the short run at least they're going to end up with something better. There would be also in the strategic planning some ideas about how do we keep public housing and make it public, keep it public, and expand it through public money as opposed to, you know, sort of leaving it for corporations and nonprofits

Cindy McCullough – 27 Charter Street, Salem, MA commented as follows: Ms. McCullough expressed her concerns about Unit 409, 27 Charter Street and the safety issues going on and she expressed her concern for the safety and well-being of residents of 27 Charter Street, Salem, MA.

Anne Cameron – Executive Assistant, Salem Housing Authority – see attached comments.

Anonymous - submitted a letter of their concerns regarding the Code of Interpersonal Conduct. See attached letter.

Gary Dean – Director of Maintenance, Salem Housing Authority – see attached comments.

Massiel Garcia – Director of Finance, Salem Housing Authority thanked the Board for preparing the Code of Interpersonal Conduct for the Board of Directors of the Salem Housing Authority. Massiel said that she needs more time to review the document before providing any comments.

Gene Collins- Pioneer Terrace, Salem, MA – commented on the board's role in the operation of the housing authority and the need for a more positive approach

Denise Regan emphasized the importance of the board's fiduciary duty, particularly in relation to check writing procedures, budget preparation, and audit management. She urged the board to take these responsibilities seriously and address them.

January 8, 2025

To the Board of Directors:

Re: Code of Interpersonal Conduct for the Board of Director of the SHA

1 . Please hi-light what comments and/or suggestions submitted by the SHA Employees were incorporated into the code of interpersonal conduct "draft" policy. I have attached all of the comments and suggestions submitted by the SHA employees for your convenience. Staff took the time and really put effort forth here. It is very important to us/them to see their suggestions incorporated into the policy.

2. The paragraph that speaks about the Board "should" not assign tasks to employees should read

The Board of Directors "cannot" assign tasks to the SHA Employees.....

3. The Agenda will by set by the Chair and the Vice Chair with the advice of the Executive Director should be stricken and instead read "the Agenda will be set by the Executive Director/Executive Assistant with input, requests, suggestions and additions by the Chair and the Vice Chair".

In the spirit of collaboration, I, as an employee of the authority respectfully request that the Board read all of the employees' comments and suggestions again and incorporate some of those into the code of interpersonal conduct for the Board of Directors of the SHA. I have attached hereto those comments/suggestions by staff for your convenience.

Please also see attached comments from a staff member relative to the draft code of interpersonal conduct of the Board of Director of the SHA.

January 8th, 2025

Dear SHA Board of Directors,

In preparation for the board meeting on January 8th, 2025, I had a chance to review the proposed "Code of Interpersonal Conduct for the Board of Commissioners of the Salem Housing Authority". Please take the time to consider my comments on this document.

Page 2, paragraph 6 states "...no one may speak at a board meeting without permission of the chair, and all persons must, at the request of the chair, be silent."

This is great when considering comments from the public outside of the allotted time, which should be applied equally to all comments made out of turn, or other person intentionally disrupting business. However, when considering the knowledge, context, and clarification that staff can provide to the board about day-to-day operations, it seems difficult to do so during a meeting with the document worded as above.

Is there a formal process for such permission? If so, clarification would be helpful for situations where context or additional knowledge would be necessary for the board to fully understand a given topic or situation.

Page 3, bullet 1 states, "Holding board meetings that last longer than one hour..." should not be considered as hostility or creating a hostile work environment.

What is the definition of hostility or hostile work environment in this context? Hostility can mean different things to different people based on their life experience, background, and interpersonal history. A clear definition in a subtext or footer, or an adjustment to wording, would provide a much clearer framework when considering the length of a meeting.

If a board member, or members, is (are) intentionally stalling the progress of a meeting solely to cause all parties to be present longer, would that not be considered hostile? How should the board handle such an allegation, should it arise?

Not having a definition of hostile creates a situation where personal feelings will influence the understanding of the word and will cause conflict when addressing this clause.

Page 3, bullet 7 states "Discussions about DEI including racism, bias (implicit or overt), discrimination or etc." should not be considered as hostility or creating a hostile work environment.

These discussions can be useful and necessary in many instances, especially in situations where the state or federal requirements of inclusion are not being met. However, when discussing anything involving Diversity Equity and Inclusion (DEI), the race or background of an individual should not qualify one individual over another in the board's hiring or decision-making practices.

When discussing the hiring of a third-party consultant to assist with strategic planning on September 11th, 2024, during the regular board meeting, the board suggested hiring an individual of color who owns a consulting firm because they see things through a different lens (per the meeting minutes, and as witnessed in person). This hiring practice would exclude any firm not owned by a person of color solely based on their race. The race of a business owner should have no bearing on the strategic planning or hiring practice of the LHA and its board.

While hiring a person of color, or utilizing a firm owned by a person of color, is of no issue, the board should not exclude anyone based on their race, religion, national origin, gender, disability, familial status, marital status, sexual orientation, receipt of public assistance, genetic information, or military status.

The discussion of DEI and the intersection of race, in addition to many other factors, with the work we do is often necessary, but that cannot give way to exclusionary practices that hypocritically undermine the concept of DEI.

It seems that this Code is necessary to ensure everyone involved in the business conducted at board meetings is treated fairly. Because of this, it is extremely important to consider using specific definitions to avoid interpretation causing conflict and delays in furthering the business of the LHA. Additionally, it is important to be clear that there will be no discrimination of any kind allowed in these meetings or in the decisions made by the board.

Lastly, what are the penalties for violations of this code? Who will interpret and enforce it?

Thank you.

1/8/2025

Good evening, I had the opportunity to read the proposed code of interpersonal conduct for the board of commissioners for the Salem housing authority.

After reading this document, I feel I must speak up. I have some serious concerns. The first of which is that the document is terribly one sided. Written from the perspective of, and benefitting, mainly one individual. The board chair.

I am curious, and I hope the board members will entertain, and answer the following question:

Who Authored this document?

I have a hard time reading this submittal knowing so many staff members took this policy and their individual input very seriously. Many submitted feedback for this policy, and NONE of that feedback was incorporated. It is so blatantly absent, it is obvious that this is intentional.

I would ask the board to go back and read the staff input and reconsider the wording in this policy.

The policy was supposed to be written collaboratively.

Was there collaboration of any kind? Did board members even collaborate on the writing of this?

Instead of a collaborative effort with the staff and residents, this document has been presented as a partisan policy on the "POWERS" of the board chair, and a directive to the Salem Housing Authority Staff and residents on how to feel or NOT feel about the board members actions and conduct.

How we "construe" or misconstrue a particular situation or action that is mentioned in this document is subjective and personal, and would absolutely be seen as hostile or creating a hostile workplace if a board member is purposely acting in such a way.

This is the whole reason, in its entirety, that we originally came together as a staff and wrote the letters that we did. We signed our names to those documents.

Board members? I respectfully ask, Is your collective answer to our written concerns, to author and approve a document like this? As an employee of this housing authority, and as the Governors Appointee and a fellow Board member for a housing authority myself, I sincerely hope you consider not approving this document and completely starting over from a neutral place, and with a much more collaborative and inclusive spirit.

Thank you.

-Gary Dean

For Sections V. through X11. Please see attached Summary Sheet.

V. Report of the Executive Director

- See Executive Director's Report Attached – January 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 Coordinator Reports, and Completed Work Orders for Month of December 2024)
- PHN Notice 2024-21 Notice of Funding Availability (NOFA) for Self-Sufficiency Program For State Aided Public Housing and Massachusetts Rental Voucher Program (MRVP)
- Email dated January 2, 2025 to Cathy Hoog, Executive Director and Veronica Miranda re: Public Records Request;

VII. Reports of the Committees

There are no reports of the Committees.

VIII. Recommendations of the Chair

Updated internal control policy comes before the Board by March 2025

Carly McClain left the meeting at 7:22 p.m. due to technical issues.

IX. Report of the Treasurer

Bills

Aaron Paternoster moved to approve the bills for the period December 1, 2024 through December 31, 2024 as presented. Romell Kidd seconded the motion and the **roll call** vote was as follows:

Ayes

Veronica Miranda
Aaron Paternoster
Romell Kidd

Nays

Doneeca Thurston-Chavez

Balance Sheet and Statements of Revenues and Expenses

The Executive Director will present the Balance Sheet and Statements of Revenue and Expenses to the Board of Directors.

Aaron Paternoster moved to accept the Balance Sheet and Statements of Revenues and Expenses prepared by Paul Pavia of Fenton, Ewald & Associates, P.C. for one (1) month ending October 31, 2024. Romell Kidd seconded the motion, and the **roll call** vote was as follows:

Ayes

Veronica Miranda

Aaron Paternoster

Romell Kidd

Doneeca Thurston-Chavez

Nays

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 two (2) months ending November 30, 2024. Romell Kidd seconded the motion, and the **roll call** vote was as follows:

Ayes

Veronica Miranda

Aaron Paternoster

Romell Kidd

Doneeca Thurston-Chavez

Nays

X. Unfinished Business

Review/Approve Consultant for Strategic Planning/Code of Conduct (3 quotes attached)

Aaron Paternoster moved to table the approval consultant firm of the Board's choice to assist the Salem Housing Authority in Strategic Planning and the drafting of a Code of Conduct for the Board of Directors until the next regularly scheduled board meeting of the Board of Directors on February 12, 2025 so that the Board may reach out to vendors and get clarifications on a few things. Doneeca Thurston-Chavez seconded the motion and the **roll call** vote is as follows:

Ayes

Veronica Miranda

Aaron Paternoster

Romell Kidd

Nays

Doneeca Thurston-Chavez

Code of Conduct (Carly needs to send revision for language)

Aaron Paternoster moved to table the Code of Interpersonal Conduct for the Salem Housing Authority Board of Directors until the next regularly scheduled Board of Directors Meeting on February 12, 2025 so that Carly McClain can review the proposed policy and review all the staff comments that were submitted a few months ago when requested by the Board of Directors. Romell Kidd seconded the motion and the roll call vote was as follows:

Ayes

Veronica Miranda

Aaron Paternoster

Romell Kidd

Doneeca Thurston-Chavez

Nays

Transcript of the Regular Board of Directors Meeting of August 14, 2024 Prepared by Magna Legal Services

Cathy Hoog will present to the Board of Directors the Transcript of the Regular Board of Directors Meeting of August 14, 2024 prepared by Magna Legal Services for review and approval.

Doneeca Thurston-Chavez moved to table the transcript of the Regular Board of Directors Meeting of August 14, 2024 prepared by Magna Legal Services until the next regularly scheduled Board of Directors Meeting on February 12, 2025 so that the Board of Directors could have more time to review. Aaron Paternoster seconded the motion and the **roll call** vote was as follows:

Ayes

Veronica Miranda

Aaron Paternoster

Romell Kidd

Doneeca Thurston-Chavez

Nays

Executive Director Evaluations from the Board

XI. New Business

Discuss In-House Counsel

Doneeca Thurston-Chavez moved to table the discussion relative to In-House Counsel until the next regularly scheduled board meeting of the Board of Directors on February 12, 2025. Romell Kidd seconded the motion and the roll call vote was as follows:

Ayes

Veronica Miranda
Aaron Paternoster
Romell Kidd
Doneeca Thurston-Chavez

Nays

Internal Control Policy

The Board of Directors Agreed to update the internal control policy and present for signature in March 2025.

Cell Phone Access

In accordance with Budget Guidelines the Executive Director will request that the Board Approve certain administrative and maintenance employees for cell phone access. Please see attached list.

Aaron Paternoster moved to approve certain administrative and maintenance employees for cell phone access as per the attached list. Romell Kidd seconded the motion and the vote was as follows:

Ayes

Veronica Miranda
Aaron Paternoster
Romell Kidd
Doneeca Thurston-Chavez

Nays

Collection of Losses – Write Offs through December 31, 2024 per Public Housing Notice 2017-17

Cathy Hoog presented to the Board of Directors the Collection of Losses – Write Offs Through 12/31/24 per Public Housing Notice 2017-17.

Doneeca Thurston-Chavez moved to approve write offs through December 31, 2024, for State Development 667 in the amount of \$1,331.11, State Development 200 in the amount of \$24,969.67, Federal Development in the amount of \$429.60 for a total amount of \$26,730.38 pursuant to Public Housing Notice 2017-17. Romell Kidd seconded the motion and the **roll call** vote was as follows:

Ayes

Veronica Miranda
Aaron Paternoster
Romell Kidd
Doneeca Thurston-Chavez

Nays

XII. Other Business/Late Communications

There was no other business or late communications.

XIII. Adjournment

Aaron Paternoster moved that the Board adjourn the Regular Meeting of January 8, 2025 at 8:35 p.m. Doneeca Thurston-Chavez seconded the motion and the **roll call** vote was as follows:

Ayes

Veronica Miranda
Aaron Paternoster
Romell Kidd
Doneeca Thurston-Chavez

Nays

**SUMMARY PAGE FOR MINUTES OF THE REGULAR MEETING
WEDNESDAY, JANUARY 8, 2025 AT 6:00 P.M.
ARTICLES V THROUGH XII**

Executive Director's Report

Cathy Hoog - mentioned that they had received 200 program referrals for their housing program. Veronica Miranda raised a question about the Family Self-Sufficiency Program for State Aided Public Housing, which Cathy agreed to address in her report. Cathy discussed the progress of the new housing program, which has received 8 spots and is working closely with shelter programs to ensure family success. She also mentioned a budget presentation planned for the next month and the completion of 342 work orders in the past month. Cathy highlighted the need for a strong application for the State Self Sufficiency program, which she is working on, and the potential for partnership with Marblehead. She also mentioned the Salem Community Preservation Committee's grant application process and the receipt of \$658,000 in shortfall funding for the section 8 program.

Code of Conduct Concerns Discussed

Cathy expressed that the Strategic planning included developing a code of conduct collaboratively. Carly, who had been working on the document, apologized for not incorporating staff's comments and proposed to work with staff members to improve the document. Cathy raised questions about the purpose of the document, suggesting that it might be redundant if consultants are hired to develop a code of conduct. She also mentioned that a board code of conduct was recommended during an executive session in May 2024.

Code of Conduct Policy Discussion

Cathy Hoog expressed concerns about the timing and potential redundancy of the code of conduct policy, given that a similar policy was part of the strategic planning process. Carly emphasized the importance of collaboration and the need for a policy to guide the agency's progress. Aaron suggested a regular review of the code of conduct to ensure it remains relevant and effective. Doneeca Thurston-Chavez echoed Aaron's sentiments, highlighting the need for a collective, collaborative process in developing the code of conduct. The Board agreed to consider the feedback and continue the discussion at the next meeting.

Collaboration, Code of Conduct, and Bills

Aaron Paternoster expressed his agreement with the need for collaboration with the agency, emphasizing that the agency staff runs the agency and the board only runs the meetings. He suggested that the code of conduct should focus on the board's function in these meetings. A motion was made to table the policy for further review and incorporation, which was seconded. Carly agreed to this motion. The meeting then moved on to discuss the bills and transfers, with Veronica Miranda asking about the storm door replacement at Garden Terrace and Cathy explaining the high legal fees due to the volume of people served and the extended period it takes to file for an eviction.

Technical Issues Disrupt Meeting

The meeting was disrupted by technical issues, including a loss of internet connection and frozen screens. It took a few minutes to reconnect. Carly McClain had to leave the meeting early due to technical difficulties.

Dealing With Non-Payment of Rent

Cathy Hoog and the Board discussed the process of dealing with non-payment of rent by residents, emphasizing the importance of prevention and the various steps taken before resorting to court action. Cathy highlighted the role of service coordinators in connecting residents with resources to avoid court proceedings. Cathy spoke about the lengthy process involved, which could take up to two years, and the multiple opportunities given to residents to resolve their issues before an execution is issued. Cathy also mentioned that the lease outlines the responsibilities of both the housing authority and the tenant.

Financial Statements

Veronica Miranda initiated a discussion about the financial statements from December 2024. She sought approval for the period from September 1st, 2024 to December 31st, 2024. Doneeca Thurston-Chavez also raised a question about the increase in administrative salaries and employee benefits in October and November, which Cathy explained could be due to new hires or compensated absences. Cathy also clarified the inconsistencies in the operating subsidy payments. Veronica Miranda expressed a need for more time to review the draft budget before the next meeting in February, which Cathy agreed to provide early. The board then approved the balance sheet and statements of

revenues and expenses for the month ending October 31st, 2024, and for the two months ending November 30, 2024.

Strategic Planning Process and Proposals

Veronica Miranda led a discussion about the strategic planning process, focusing on the code of conduct and procurement regulations. The Board of Directors debated the implications of deviating from the proposals submitted, with Veronica suggesting they could create a formal proposal if they think the process will be more than \$50,000. The Board of Directors also discussed the proposals from Conditioning Leaders and VPCC, with Doneeca Thurston-Chavez suggesting they reach out to Conditioning Leaders for a more accurate estimate. The Board of Directors agreed to set a deadline for the strategic planning process and to consider putting out an RFP. Romell Kidd also proposed setting a goal timeline for the process.

Transcript Inaccuracies and Approval Delay

Veronica Miranda expressed concerns about the inaccuracies in the transcript of the August 14th meeting and suggested tabling the approval until the next meeting. She proposed sending the statements and any inaccuracies found to the company for correction. Aaron Paternoster suggested reviewing the inaccuracies and their materiality, highlighting that it's semantics shouldn't tie up the approval process and Veronica Miranda proposed looking into other transcription services for future meetings. The board agreed to table the approval of the transcript until the next meeting.

In House Counsel and Internal Control Policy

Veronica proposed discussing the topic of in-house counsel, which was tabled for further discussion. She also brought up the need for an updated internal control policy, suggesting it should be presented to the board for review.

Check Signing Process and Policies

Veronica Miranda and Cathy Hoog discussed the process of paper check signing and the adherence to their organization's bylaws and policies. Aaron Paternoster clarified that he had not physically signed any checks, but had authorized the SHA to do so. Veronica

expressed concern about the lack of knowledge about the checks being signed. Cathy Hoog explained that the Housing authority primarily pays bills electronically, with only a few checks being issued and signed with the signature stamp according to the Check Signing and Security Agreement. She mentioned that the check signing policy is reviewed regularly and that only the treasurer, assistant treasurer, and herself are authorized to sign checks manually. Veronica also noted that the policy might need updating as it seems to be not fully followed.

Updating Policies and Signatory Information

Veronica Miranda discussed the need for an update to the organization's policies, emphasizing the responsibility of all members, not just the treasurer, to be aware of what's going on. Cathy Hoog mentioned that the Housing Authority is audit6ed every year and has not had any findings from auditors for five years, indicating compliance. Veronica also suggested that the board should review all policies related to internal controls. She proposed a discussion about updating the signatory information in the bylaws to reflect the organization's actual operations. Veronica also encouraged board members to familiarize themselves with the organization's policies and procedures.

Salem Housing Authority Board of Commissioners
Special Meeting Minutes
Date: January 29, 2025
Time: 9:00 AM
Location: Virtual - Zoom

Call to Order:

The meeting was called to order by Chair Miranda at 9:04 AM.

Roll Call:

Present:

- Doneeca Thurston-Chavez
- Veronica Miranda
- Romell Kidd
- Aaron Paternoster

All board members were present. Commissioner McClain resigned on January 28, 2025. The Board publicly thanked her for her service.

Chair Miranda reminded all attendees that the meeting was being recorded in accordance with Massachusetts Open Meeting Law (M.G.L. c. 30A, §§ 18-25). Public attendees were instructed to remain muted unless called upon. Any disruptive individuals could be removed by the chair after a clear warning.

Executive Session Announcement:

Chair Miranda stated that the Board would enter an executive session to review past executive session meeting minutes under the following purposes:

- Purpose 1: To discuss the reputation, character, physical condition, or mental health of an individual, or to discuss discipline, dismissal, complaints, or charges brought against a public officer, employee, staff member, or individual.
- Purpose 2: To conduct strategy sessions in preparation for negotiations with non-union personnel, or to conduct collective bargaining sessions or contract negotiations with non-union personnel.
- Purpose 3: To discuss strategy with respect to collective bargaining or litigation if an open meeting may have a detrimental effect on the bargaining or litigating position of the public body.

The public was informed that the specific purposes for entering executive session are available on the state's website.

The following executive session meeting minutes were scheduled for review:

- January 13, 2021 (Purpose 2 & 3)
- February 10, 2021 (Purpose 2 & 3)
- April 14, 2021 (Purpose 1)
- May 12, 2021 (Purpose 1)
- August 27, 2021 (Purpose 2)
- October 13, 2021 (Purpose 2)
- January 12, 2022 (Purpose 1)
- February 9, 2022 (Purpose 1)

Public Engagement:

The Board agreed to limit public comment to two minutes per speaker. No public attendees raised their hands to speak.

Chair Miranda confirmed that the Board would not return to open session following the executive session and would adjourn directly from executive session, and that Commissioners would be provided with another link.

Motion to Enter Executive Session:

A motion was made by Doneeca Thurston-Chavez to enter executive session. Aaron Paternoster seconded. A roll call vote was conducted:

- Doneeca Thurston Chavez: Yes
- Romell Kidd: Yes
- Aaron Paternoster: Yes
- Veronica Miranda: Yes

The motion passed unanimously.

Adjournment:

At 9:13 AM, the Board entered executive session, and the public portion of the meeting was adjourned. The recording was stopped, and unauthorized individuals were asked to leave the meeting.

Minutes Prepared By: Veronica Miranda, Chair and Tenant Representative

Approval Date: [To be approved at the regular meeting February, 12 2025]

ED Summary February 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

- Housing Now program participants have been selected and lease ups are in motion. The Resident Services Coordinator will begin working on Family Success Plans. 8 Families have been selected.
- The Three Rivers Solar Garden in Wilbraham, MA partnership with PureSky Energy has reached commercial operation. SHA will begin receiving solar credits on electricity bills for all state-aided developments, supporting Massachusetts' transition to a greener future toward meeting decarbonization and clean energy goals.

Financial

SHA Financials remain in good standing.

- **See Financial reports included for specific details on monthly financials.**
- Management Services Agreement with Marblehead Housing Authority signed through December 2026 for \$126,838.27 annually. A 4% increase is anticipated with new Budget Submission.
- Budget Presentation by Fee Accountant Paul Pavia to take place this month.

Property/Modernization

- **399 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.
- **14 State modernization projects are currently in design or under construction. 1 project is awaiting to be assigned a designer for design and bid process.** See modernization report for more detailed updates on each project. 1 Federal modernization project is being planned for construction.
- **200 CHAMP applications being reviewed for placement.** See CHAMP report for more detailed information on champ waitlist pulls and offers for public housing units.

- No New Admissions in Public Housing

Section 8 Program

- 1179 units under lease, 14 vouchers are out looking in the community. 5 Project based admissions occurred this past month. See Voucher report for additional specifics related to Section 8 vouchers issued.
- FSS Program- **29 voucher holders** (19 is the target goal for HUD) have been enrolled into the program and signed contracts, **\$40,000 in earned escrow amongst the participants**. received. **Quarterly FSS reports will be provided with information on the FSS program and participant statistics.**

Residents and Community

- 15 new Referrals were made to the Service Coordinators this month for resident assistance. 77 residents served for ongoing case management
- **A job fair for was advertised to all residents for an opportunity to meet contracting firms and apply for opportunities that will be part of building the new Leefort Terrace.** The job fair will take place Saturday March 8th at 136 Canal Street from 8am to 1pm.
- **Installation of the new art sculptures are planned for the first week of May 2025 at Pioneer Terrace as part of the Creative Placemaking grant. Save the date for a ribbon cutting event planned for June 14, 2025.**
- Ongoing programs for residents-Wellness Wednesday series continue at Pioneer Terrace and Morency community rooms, Salem State nursing students will continue another Wellness series at Charter Street this Spring semester, indoor food pantry dates during cold winter months, Gather Health painting events, local REACT meetings with service providers in the City.
- **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

The State Family Self Sufficiency grant application is presented for Board vote this month. The funding for this program will be offered for three agencies in the state and will cover the costs

related to the hiring of a specialized Coach to provide employment, education and asset building support for all SSP participants. The expectation is for the program to serve 35-50 participants. The program includes opportunity for residents to escrow up to \$20,000. The grant award is \$90,000 annually.

SHA is in planning stages to prepare a grant for the 2025 Comprehensive Modernization grant program. The project scope is under development and will include replacement windows, building envelope repairs and roof repairs for the Charter Street building. Final application will be presented for Board vote in March 2025. Project funding is up to \$20,000 per unit.

A Community Preservation Funding eligibility application has been submitted to the City Community Preservation Committee for funding eligibility consideration. If approved, a full application will be submitted by the March deadline for the roof replacement at the Zisson development. The roof replacement is estimated around \$550,000.

The Vacancy Task Force grant application is presented for Board vote this month. The funding for this program includes \$500,000 on an annual basis for staffing a vacancy work force team to assist agencies in the North Shore region who need support with vacancy turnovers. This initiative follows the regionalization capital assistance teams and incorporates regionalization of Maintenance Management systems. The additional team members added as part of this initiative are available for work in Salem when not completing vacancy turnovers. The funding would include three additional Maintenance team members and an additional Administrative Coordinator for statewide waitlist management along with tools, supplies, vehicles and administrative costs. This PILOT program is a result of the short-term pilot last year that took place after EOHLC's call for assistance from agencies to help long term vacancy rates in the state, particularly agencies with more than 3% of their stock vacant. SHA was able to successfully assist agencies last year and was asked to consider submitting application to this initiative. Two to three agencies in the state housing agency portfolio will be chosen for this initiative.

Development/Redevelopment Updates

The Leefort Terrace construction has begun and anticipated completion/re-housing of residents is Fall of 2026.

Surplus land adjacent to Farrell Court has been evaluated and determined buildable. ED met with City Planning Staff/Mayor to hear feedback on City priorities. The Planning Department to present to the Board in March 2025.

f:

State Estimated Waiting Period for Applications:

As of January 28, 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 January 28, 2025

Number of Family Applicants	39,539
Number of Elderly/Handicapped Applicants	10,614

FEDERAL PUBLIC HOUSING
WAITING LIST

Federal Family	Pending	0
	Eligible	<u>23</u>
	Total	23
Federal Elderly	Pending	0
	Eligible	<u>223</u>
	Total	223

SECTION 8

Section 8 HCV Centralized Waitlist Salem Preference	Pending	58
	Eligible	<u>2047</u>
	Total	2105
Pequot Highlands Project-Based Voucher Program	Pending	89
	Eligible	<u>1242</u>
	Total	1331
New Point Acquisition PBV	Pending	28
	Eligible	<u>592</u>
	Total	618
ARC PBV Program	Pending	0
	Eligible	<u>0</u>
	Total	0

(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
110 Rainbow Terrace	Salem	MA	2	09/20/2021	End Participation		01/31/2025

Unit Address	City	State	Bedroom Size	Admission Date	Action Type	Move Out Reason	Effective Date
9F Pioneer Terrace	Salem	MA	1	11/04/2014	End Participation		01/15/2025
27 Charter St Unit: 1205	Salem	MA	1	04/11/2022	End Participation		01/06/2025
205 Bridge St Unit: 305	Salem	MA	1	12/02/2013	End Participation		01/09/2025

Unit Address	City	State	Bedroom Size	Admission Date	Action Type	Move Out Reason	Effective Date
73 Boston St. #6002	Salem	MA	2	02/24/2014	(Out) Other Change of Unit		01/31/2025
73 Boston St. #6003	Salem	MA	2	02/24/2014	(In) Other Change of Unit		01/31/2025

Salem CHAMP List report

Date pulled	List ID	Criteria	# Applicants	DNR & Deselected	Eligible candidates	Offers	Offers Accepted	Rejected Units	List Status
6/11/2024	26354163	2 BR Family	100		2	2	2	n/a	List is closed
8/5/2024	26698507	1BR Eld Stairs	50		2	2	2	1	List is closed
8/5/2024	26699508	1BR Eld No Stairs	50		6	3	2	1	List is closed
8/30/2024	26879688	3BR Family WC	100		0	2	0	0	List is closed
10/15/2024	27170979	1BR Eld Minority Stairs	50		10	1	8	1	Pending applicant response
10/17/2024	27195007	1BR Eld Stairs	50		7	5	4	1	Pending applicant response
12/18/2024	27571383	1BR Eld No Stairs	50		0	0	0	0	Pending applicant response
1/9/2025	27678490	2BR Family	100		0	0	0	0	Pending applicant response
1/9/2025	27683495	3BR Family	100		0	0	0	0	Pending applicant response

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 at the development. The project was bid, however, no bids were received. The project was reviewed and will be reassigned by EOHLC to another engineer.
- 258162 **Gateway Cities** (walkways, landscaping) at Rainbow Terrace
Creative project to improve walkways, landscaping. Site Improvements, Inc. Work is complete. Awaiting final close out paperwork. The Certificate of Final Completion will be presented at the February board meeting.
- 258164 **Creative Placemaking Grant Site Improvement** at Pioneer Terrace
Project to install public art and some community areas for gathering and to connect Pioneer Terrace with the neighborhood. Work is complete with the exception of minor punch list items which require warm weather and the art project installation. Awaiting final close out paperwork.
- 258167 **Site Work Concrete Repair** at Pioneer Terrace
The project is to repair concrete and asphalt areas such as walkways and stairs. Work is complete. Processing final close out.
- 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
- 258182 **Exterior Door Replacement** at Bates, Norton, Dalton, Park/Prince
An architect will be assigned by EOHLC.
- 258187 **Selective siding replacement at Farrell**
EOHLC approved the final design to go out to bid. Some problem windows are being evaluated as related to siding replacement. The scope was revised and expanded to include window replacement. The project is out to bid and bids are due 2/05/25.
- 258188 **ARPA Federal Pacific Electric Panel Replacement** at Rainbow, Leefort, Bertram, Colonial, Norton, Pioneer, Morency, Ruane, Dalton, and Phillips. Adding in gas stove "master meter operator" resolution as well from 258193. Rogue Engineering and Design has submitted the schematic design to EOHLC and it is under review.

- 258189 **Walk-in tub/shower study** at Charter St. and Morency Manor and Phillips House
Subcontractor and general bids were received. Environmental Restoration Inc. was determined to be the low bidder. Due to favorable pricing, we will be able to renovate all 18 units (14 base units and 4 alternate units): 667-5 (7), 667-6 (4), 705-4 (7). Contracts are being executed.
- 258194 **Elevator upgrades** at Charter
Work to update the elevators to new code to be completed by our current elevator company under contract.
- 258197 **Site Work and Concrete Repair** at Colonial Terrace
In design at 100% construction documents. Under final review. Once approved the project will be put out for public bid.
- 258198 **Sustainability Study- flood zone, rising sea level** at Pioneer
With EOHLC. No information yet.
- 258199 **Roof Replacement** at Ruane
An architect will be assigned by EOHLC. This building is in a historic district.
- 258200 **Boilers and HW Tanks Replacement** at Phillips
The equipment is at the end of its useful life. An engineer has been assigned by EOHLC. Options for type of systems are being weighed. This building is in a historic district.

Projects to be Assigned to a Designer, Designed and Bid

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

FEDERALLY-FUNDED PROJECTS

Barton Elevator: Work to renovate the elevator and bring it up to code is being scheduled with the elevator company

Zisson Roof Replacement: The SHA will submit an application for eligibility for CPA funds to pay for this work.

Report to the Board 2/5/2025

2/5/2025

14 New Voucher Out-Looking

1 Ported to Another Jurisdiction (New Vouchers)

Voucher's Out-looking Time Frame:

Under 30 Days	12
30-60 Days	1
60-90 Days	
90-120 Days	1
120+	

Voucher

Issued since: 1/9/2025	12
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PBV Admission	4
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**Units Under Lease as of
February 1, 2025**

1179



Quarter

Oct 01 - Dec 31, 2024
(Q4)

Site

Housing Authority of Salem,
Massachusetts

Client Status

Currently
enrolled and
all graduated
clients

Gender

All
Genders

Race and Ethnicity

All Races and
Ethnicities

Baseline Earnings

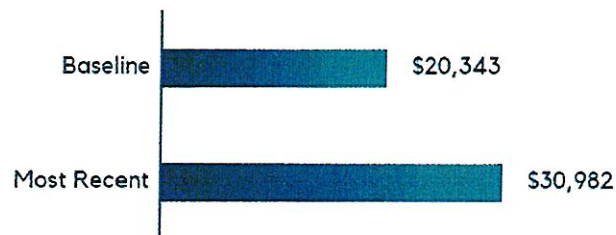
All
Earnings

Client Ages

All Ages

Core Outcomes

Average Annual Earnings



58% increased earnings

\$12,500 average increase

Average Monthly HAP



38% reduced HAP

\$281 average decrease

Average Credit Score

0% increased credit score

0 average increase

0% improved credit score



Quarter

Oct 01 - Dec 31, 2024
(Q4)

Site

Housing Authority of Salem,
Massachusetts

Client Status

Currently
enrolled and
all graduated
clients

Gender

All
Genders

Race and Ethnicity

All Races and
Ethnicities

Baseline Earnings

All
Earnings

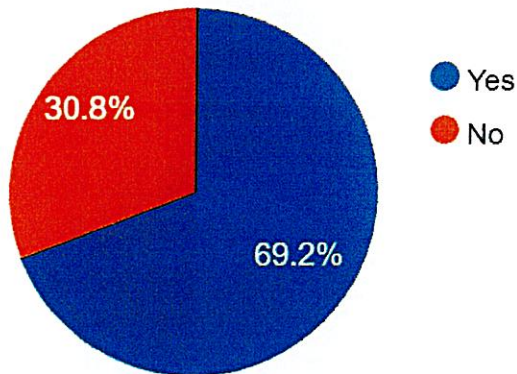
Client Ages

All Ages

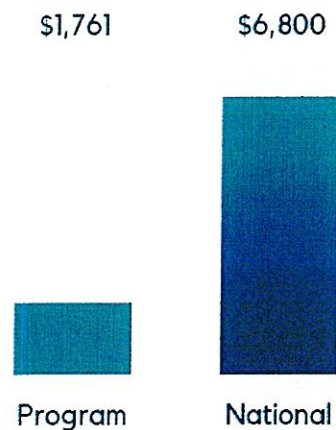
Core Outcomes

Total accumulated escrow for 26 clients is \$31,697

Have Escrow



Average Escrow



Estimated Graduation Rate



Quarter

Oct 01 - Dec 31, 2024
(Q4)

Site

Housing Authority of Salem,
Massachusetts

Client Status
Currently
enrolled and
all graduated
clients

Gender
All
Genders

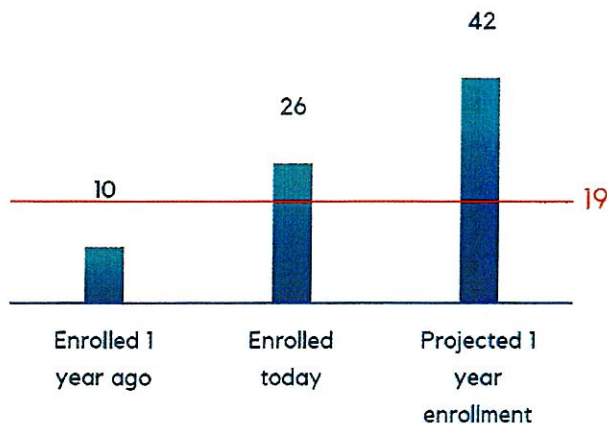
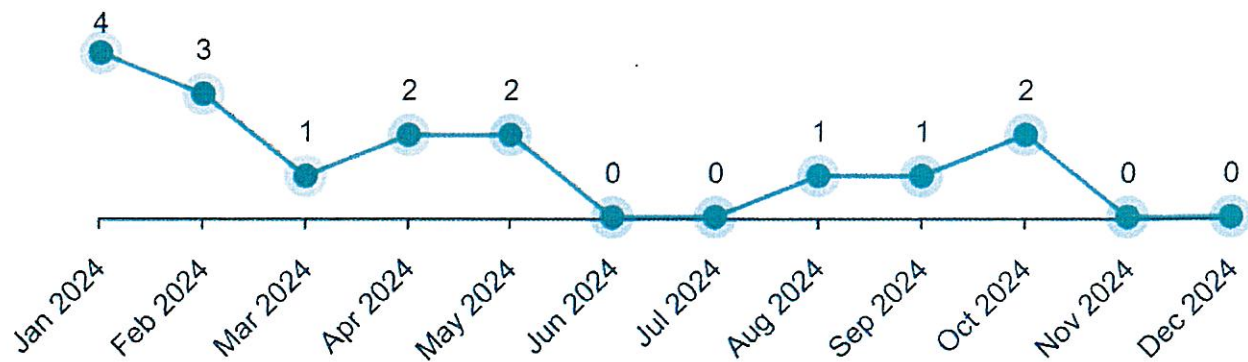
Baseline Earnings
All
Earnings

Race and Ethnicity
All Races and
Ethnicities

Client Ages
All Ages

Enrollment Trends

New Enrollment by Month



In the last 12 months, there were 16 newly enrolled clients, 0 graduates, and 0 contract terminations. This resulted in an overall increase in enrollment of 16

If these trends continue, you will maintain your target enrollment.



Quarter

Oct 01 - Dec 31, 2024
(Q4)

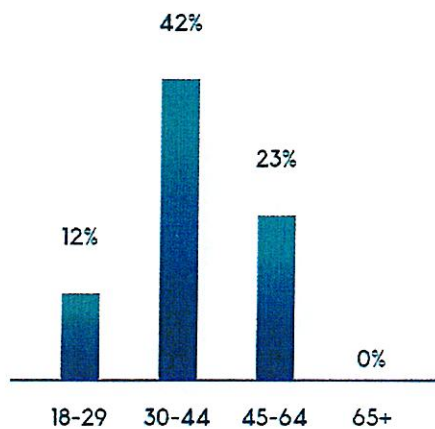
Site

Housing Authority of Salem,
Massachusetts

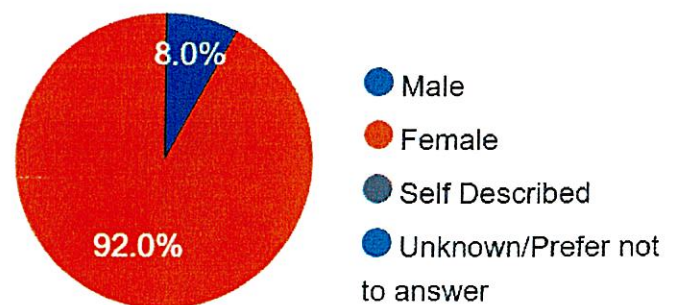
Client Status
Currently
enrolled and
all graduated
clients

Client Demographics

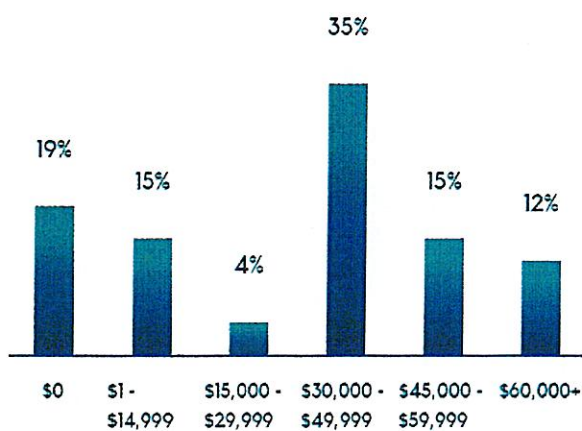
Client Ages



Gender



Baseline Earnings





Quarter

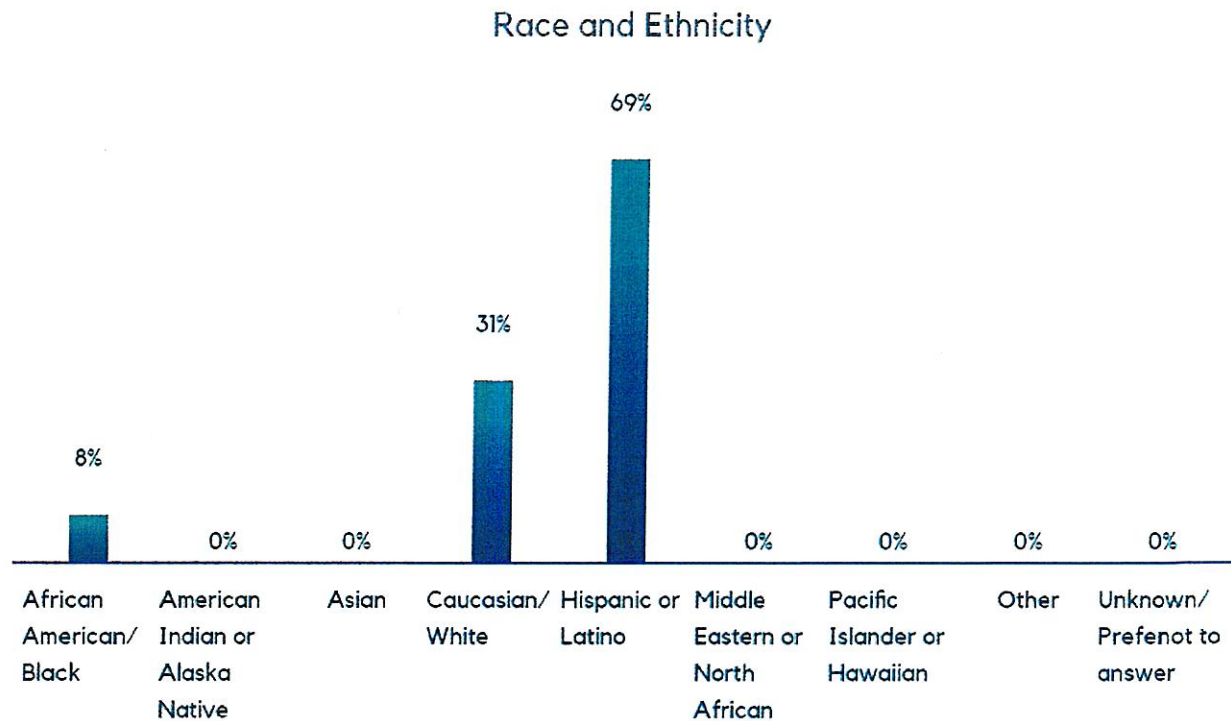
Oct 01 - Dec 31, 2024
(Q4)

Site

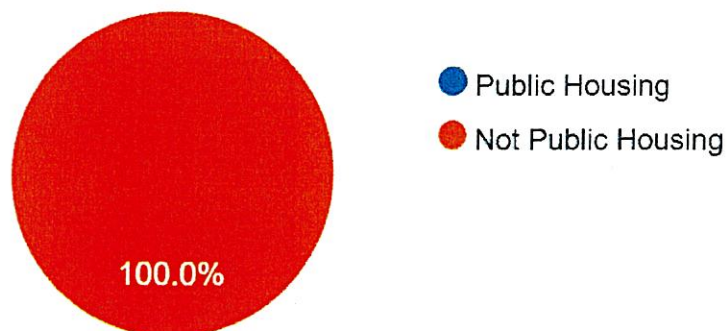
Housing Authority of Salem,
Massachusetts

Client Status
Currently
enrolled and
all graduated
clients

Client Demographics



Public Housing Tenants



Salem Housing Authority

27 Charter Street
Salem, MA 01970

(978)744-4431



Cathy Hoog
Executive Director

January 1- 31, 2025

Mary Ann Kairouz

RSC MONTHLY REPORT

Total Referrals to RSC:

New Referrals: 10

On-Going Referrals: 34

Categories of services and the number of tenants provided services:

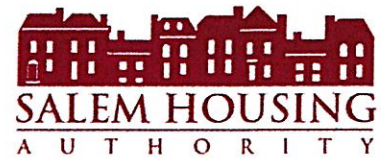
<u>Mental-behavioral health</u>	<u>4</u>
Housing stabilization support, one-time deep cleaning	<u>3</u>
Re-certification assistance	<u>2</u>
Housekeeping, laundry services through agency referrals	<u>3</u>
Wellness and fitness workshops	<u>23</u>
<u>Nutrition-SNAP application and list food pantry resources</u>	<u>1</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>Health insurance, Health supportive services</u>	<u>6</u>
<u>Other- resources posted in buildings</u>	<u>26</u>
<u>Other-passed out to tenants</u>	<u>0</u>
<u>Other- robo calls of events or services</u>	<u>139</u>

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

Salem Housing Authority

27 Charter Street
Salem, MA 01970



(978)744-4431

Cathy Hoog
Executive Director

Other important info to include:

- Wellness Wednesday will be starting January, 2025 – wellness classes will be the Morency Community Room and Pioneer Terrace Community Room, will continue until February 19 and will resume on March 5, 2025.
- Lunch with tenants at Ruane, 1/14/24
- Mandatory Community meeting held at Ruane on January 21st with Salem Housing Authority staff review rules and policies- planning to have house meeting 2-4 times per year.
- Attempting to plan a Holiday dinner for Rainbow and family Housing in December, we met with Salem State Staff to look at several venues. Tentatively, we will plan on a Springtime date with the new Family RSC.
- REACT meeting, No January meeting.
- Planning social monthly at community engagement Morency, Dalton, and Pioneer community rooms (Coffee hour, snacks, movies, games, etc.)
- Gather Health Painting Social for Pioneer and Bertram, 1/22/24, approximately 7 residents attended.
- Gather Health Painting Social for Morency and Dalton, 1/14/25, approximately 5 residents attended.
- Weekly office hours at Morency/Dalton Community Room.
- Meet with other community organizations- EPNG, NorthShore REACT
- Posted informative pamphlets to upcoming workshops and Events.
- Arranging Workshops for Morency/Dalton, and Pioneer Terrace
- Post up local events-Social Programs, Transportation schedule, and outing events hosted by COA.
- December 2024-2 Holiday Socials at Morency and Pioneer Community Rooms-food and games (45 in attendance- 25 at Pioneer and 20 at Morency)
- Robo calls reminder for Pantry and Wellness Days Morency, Dalton, Bartram, Pioneer Charter St
- Planning social monthly at community engagement Morency, Dalton, and Pioneer community rooms (Coffee hour, snacks, movies, games, etc.)
- 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- EPNG, NorthShore REACT, City of Salem Members, Local Providers and/or Medical Professionals.
- Posted informative pamphlets to upcoming workshops and Events.
- Arranging Workshops for Morency/Dalton, and Pioneer Terrace

Salem Housing Authority

27 Charter Street
Salem, MA 01970



(978)744-4431

Cathy Hoog
Executive Director

- Post up local events-Social Programs, Transportation schedule, and outing events hosted by COA.
- MBTA weekend Specials
- SAMHSA 988 information
- Haunted Happening for October

Salem Housing Authority

27 Charter Street
Salem, MA 01970

(978)744-4431



Cathy Hoog
Executive Director

January 1- 31, 2025
Kathlyn Valianti

January RSC MONTHLY REPORT

NEW Referrals to RSC: _____ 5

Ongoing case management/referrals: _____ 43

Category:

<u>Mental / behavioral health</u>	<u>7</u>
<u>Housing stabilization support / One time deep cleaning</u>	<u>7, 10</u>
<u>Re-certification assistance</u>	<u>Ruanne</u>
<u>Housekeeping/ Agency referrals</u>	<u>2</u>
<u>Wellness & fitness</u>	<u>7</u>
<u>Nutrition/Snap applications, food pantry resources</u>	<u>23</u>
<u>Healthy food options, food pantry and emergency shopping</u>	<u>2</u>
<u>Community Engagement / Socialization</u>	<u>2</u>
<u>Health insurance / Health supportive services</u>	<u>46</u>
<u>Other- Distribution of flyers and community events</u>	<u>5</u>
<u>Other</u>	<u>26</u>

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

her important info to include:

Salem Housing Authority

27 Charter Street
Salem, MA 01970



(978)744-4431

Cathy Hoog
Executive Director

- Wellness Wednesday will be starting January, 2025 – wellness classes will be the Morency Community Room and Pioneer Terrace Community Room, will continue until February.
- Lunch with tenants at Ruane, 1/14/24, Mandatory Community meeting held at Ruanne on January 21st with Salem Housing Authority staff re review rules and policies.
- Attempting to plan a Holiday dinner for Rainbow and family Housing in December, met with Salem State Staff to look at several venues. Tentatively, we will plan on a Spring time date.
- REACT meeting, No January meeting.
- Planning social monthly at community engagement Morency, Dalton, and Pioneer community rooms (Coffee hour, snacks, movies, games, etc.)
- Gather Health Painting Social for Pioneer and Bertram, 1/22/24, approximately 7 residents attended.
- Gather Health Painting Social for Morency and Dalton, 1/14/25, approximately 5 residents attended
- Weekly office hours at Pioneer Terrace Community Room.
- Meet with other community organizations- EPNG, NorthShore REACT
- Posted informative pamphlets to upcoming workshops and Events.
- Arranging Workshops for Morency/Dalton, and Pioneer Terrace
- Post up local events-Social Programs, Transportation schedule, and outing events hosted by COA.

Community Grant: Cleaning Services/ Ongoing

A.D. Bates Resident
Ruth Barton Square
Robert Barton Square
Raymond Ruanne
Donald N. Pioneer Terrace
Cynthia M. Dalton
Larry C. Charter St
Somolly, L. Rainbow Terrace
Ruth S., Jan 25 Barton Sq.

Salem Housing Authority

Work Order Complete/Incomplete Report

Program(s): State 667

Project(s): State Elderly 667-1: **Leefort Terrace**

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

No Information For Selected Criteria

No Information For Selected Criteria

No Information For Selected Criteria

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: 1/1/2025, Created Through: 1/31/2025, Completed From: 1/1/1900, Completed Through: 12/31/9999

Work Order By Priority					
Priority	Count	Incomplete	Complete	Tot. Days	Avg. Days
Emergency	3	0	3	5.21	1.74
Routine	2	0	2	13.71	6.86
Totals:	5	0	5	18.92	3.78

Work Order By Employee					
Assigned Employee	Count	Incomplete	Complete	Tot. Days	Avg. Days
Alex Vega Lopez	3	0	3	13.71	4.57
Charlie Felton	1	0	1	1.17	1.17
Michael Fitzgerald	1	0	1	4.04	4.04
Totals:	5	0	5	18.92	3.78

399 total work orders this month

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: 1/1/2025, Created Through: 1/31/2025, Completed From: 1/1/1900, Completed Through: 12/31/9999

Work Order By Priority				
Priority	Count	Incomplete	Complete	Avg. Days
Emergency	8	0	8	5.55
Routine	7	0	7	22.37
Inspection UPCS	1	1	0	0.00
Totals:	16	1	15	27.92

Work Order By Employee				
Assigned Employee	Count	Incomplete	Complete	Avg. Days
Alex Vega Lopez	12	0	12	20.67
Charlie Felton	1	0	1	1.96
Craig Powers	1	0	1	0.96
Ken Sousa	1	1	0	0.00
Michael Filzgerald	1	0	1	4.33
Totals:	16	1	15	27.92

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: 1/1/2025, Created Through: 1/31/2025, Completed From: 1/1/1900, Completed Through: 12/31/9999

Work Order By Priority				
Priority	Count	Incomplete	Complete	Avg. Days
Emergency	5	0	5	2.17
Routine	6	1	5	26.38
Totals:	11	1	10	28.55

Work Order By Employee				
Assigned Employee	Count	Incomplete	Complete	Avg. Days
Alex Vega Lopez	7	0	7	7.00
Charlie Felton	1	0	1	2.17
Craig Powers	1	1	0	0.00
Michael Filzgerald	1	0	1	18.42
Patric Bishop	1	0	1	0.96
Totals:	11	1	10	28.55

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, Empl
All, Created From: 1/1/2025, Created Through: 1/31/2025, Completed From: 1/1/1900, Completed Through: 12/31/9999

Work Order By Priority					
Priority	Count	Incomplete	Complete	Tot. Days	Avg. Days
Emergency	18	0	18	15.10	0.84
Routine	10	0	10	27.52	2.75
Inspection UPCS	2	1	1	0.92	0.92
Totals:	30	1	29	43.54	1.50

Work Order By Employee					
Assigned Employee	Count	Incomplete	Complete	Tot. Days	Avg. Days
Alex Vega Lopez	19	0	19	10.85	0.57
Bill Norris	1	0	1	0.08	0.08
Charlie Felton	2	0	2	1.76	0.88
Christian Rudloff	2	0	2	4.26	2.13
Craig Powers	2	0	2	9.34	4.67
John DeBenedictis	1	1	0	0.00	N/A
Michael Fitzgerald	1	0	1	8.25	8.25
Patric Bishop	3	0	3	9.00	3.00
Totals:	30	1	29	43.54	1.50

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: 1/1/2025, Created Through: 1/31/2025, Completed From: 1/1/1900, Completed Through: 12/31/9999

Work Order By Priority					
Priority	Count	Incomplete	Complete	Tot. Days	Avg. Days
Emergency	23	0	23	20.72	0.90
Routine	30	1	29	119.31	4.11
Vacant	1	1	0	0.00	N/A
Inspection UPCS	5	1	4	16.22	4.06
Totals:	59	3	56	156.25	2.79

Work Order By Employee					
Assigned Employee	Count	Incomplete	Complete	Tot. Days	Avg. Days
Alex Vega Lopez	23	0	23	17.63	0.77
Bill Norris	5	0	5	3.83	0.77
Charlie Felton	6	0	6	9.14	1.52
Christian Rudloff	1	0	1	0.21	0.21
Craig Powers	5	1	4	11.87	2.97
John DeBenedictis	2	1	1	0.21	0.21
Ken Sousa	2	0	2	0.50	0.25
Luis Lopez	1	1	0	0.00	N/A
Michael Fitzgerald	4	0	4	26.46	6.62
Patric Bishop	13	0	13	86.40	6.65
Totals:	59	3	56	156.25	2.79

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: 1/1/2025, Created Through: 1/31/2025, Completed From: 1/1/1900, Completed Through: 12/31/9999

Work Order By Priority					
Priority	Count	Incomplete	Complete	Tot. Days	Avg. Days
Emergency	11	0	11	9.01	0.82
Routine	10	1	9	54.13	6.01
Preventive	1	0	1	28.25	28.25
Inspection UPCS	1	1	0	0.00	N/A
Totals:	23	2	21	91.39	4.35

Work Order By Employee					
Assigned Employee	Count	Incomplete	Complete	Tot. Days	Avg. Days
Alex Vega Lopez	8	0	8	0.87	0.11
Bill Norris	4	0	4	54.50	13.63
Charlie Felton	4	0	4	3.68	0.92
Craig Powers	1	0	1	7.13	7.13
Luis Lopez	1	1	0	0.00	N/A
Michael Fitzgerald	4	0	4	19.75	4.94
Patric Bishop	2	1	1	5.46	5.46
Totals:	23	2	21	91.39	4.35

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: 1/1/2025, Created Through: 1/31/2025, Completed From: 1/1/1900, Completed Through: 12/31/9999

Work Order By Priority					
Priority	Count	Incomplete	Complete	Tot. Days	Avg. Days
Emergency	3	0	3	7.50	2.50
Routine	3	1	2	4.92	2.46
Totals:	6	1	5	12.42	2.48

Work Order By Employee					
Assigned Employee	Count	Incomplete	Complete	Tot. Days	Avg. Days
Alex Vega Lopez	1	0	1	2.67	2.67
Bill Norris	1	1	0	0.00	N/A
Charlie Felton	3	0	3	7.50	2.50
Craig Powers	1	0	1	2.25	2.25
Totals:	6	1	5	12.42	2.48

Work Order By Employee

Assigned Employee	Count	In Progress	Completed	Total	Total Days	Avg Days
Alex Vega Lopez	11	0	11	12.87	1.17	0.00
Craig Powers	2	0	2	13.17	6.59	0.00
Patric Bishop	2	0	2	15.63	7.82	0.00
	0					

8	12.29	1.54
6	14.42	2.41
1	14.96	14.96
	0	

Work Order By Priority

Priority	Count	Incomplete	Complete	Total
Emergency				
Routine				
Vacant				

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, Empl All, Created From: 1/1/2025, Created Through: 1/31/2025, Completed From: 1/1/1900, Completed Through: 12/31/9999

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: 1/1/2025, Created Through: 1/31/2025, 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	7.00	0.58
Routine	5	1	4	4.38	1.10
Inspection UPCS	3	0	3	3.51	1.17
Totals:	20	1	19	14.89	0.78

Work Order By Employee					
Assigned Employee	Count	Incomplete	Complete	Tot. Days	Avg. Days
Alex Vega Lopez	14	0	14	8.10	0.58
Bill Norris	1	0	1	0.08	0.08
Charlie Felton	2	0	2	2.46	1.23
Craig Powers	2	1	1	2.88	2.88
Ken Sousa	2	0	2	1.37	0.69
Totals:	20	1	19	14.89	0.78

Work Order By Employee						
	Assigned	Complete	Incomplete	Complete	Total Days	Min. M
Alex Vega Lopez	41				41	31.41 0.77
Bill Norris	5				5	7.66 1.53
Charlie Felton	3		2		3	24.47 8.16
Christian Rudloff	3		4		1	0.13 0.13
Craig Powers	12		2		8	87.75 10.97
Gary Dean	37				34	18.55 0.55
John DeBenedictis						
Ken Sousa			0			
Luis Lopez	41				34	16.33 0.33
Michael Fitzgerald	18				16	92.39 5.77
Patric Bishop	16		0		14	67.43 4.82

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: 1/1/2025, Created Through: 1/31/2025, Completed From: 1/1/1900, Completed Through: 12/31/9999

Work Order By Priority					
	Count	Incomplete	Complete	Tot. Days	Avg. Days
Emergency	42	2	40	37.19	0.93
Routine	71	6	65	169.75	2.61
Preventive	13	5	8	107.59	13.45
Vacant	1	1	0	0.00	N/A
Inspection UPCS	11	3	8	42.68	5.34
	0				

Salem Housing Authority Work Order Complete/Incomplete Report

Program(s): Federal Public Housing

Project(s): Federal Elderly: Barton and Zisson

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

Work Order By Priority				
Priority	Count	Incomplete	Complete	Avg. Days
Emergency	16	0	16	24.58
Routine	8	2	6	14.01
Totals:	24	2	22	38.59
				1.75

Work Order By Employee					
Assigned Employee	Count	Incomplete	Complete	Tot. Days	Avg. Days
Alex Vega Lopez	13	0	13	9.33	0.72
Charlie Felton	2	0	2	3.83	1.92
Christian Rudloff	1	1	0	0.00	N/A
Craig Powers	2	0	2	9.17	4.59
Ken Sousa	1	1	0	0.00	N/A
Michael Fitzgerald	1	0	1	5.21	5.21
Patric Bishop	4	0	4	11.05	2.76
Totals:	24	2	22	38.59	1.75

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Work Order Complete/Incomplete

Program(s): Federal Public Housing, State 689, State 705, State 667 +17
Project(s): Federal Elderly: Barton and Zisson, Federal Family: 122.5 Boston, 73 Bos
Status: All, Status Included:Emergency, Urgent, Routine, Preventive, Vacant, Inspecti
All, Created From: 1/1/2025, Created Through: 1/31/2025, Completed From: 1/1/1900, C

WFO - PENDING									
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121.5 Br +41
JPCS, Contract, Inspection Other, Employee:
pleted Through: 12/31/9999

Salem Housing Authority
Order Complete/Incomplete

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Salem Housing Authority

Work Order Complete/Incomplete Report

Program(s): Federal Public Housing
 Project(s): Federal Family: 122.5 Boston, 73 Boston, 121.5 Br
 Status: All, Status Included:Emergency, Urgent, Routine, Preventive, Vacant, Inspection UPCS, Contract, Inspection Other, Employee:
 All, Created From: 1/1/2025, Created Through: 1/31/2025, Completed Through: 12/31/9999

Work Order By Priority				
Priority	Count	Incomplete	Complete	Avg. Days
Emergency	2	0	2	0.38
Vacant	1	1	0	0.00
Totals:	3	1	2	0.38

Work Order By Employee				
Assigned Employee	Count	Incomplete	Complete	Avg. Days
Alex Vega Lopez	1	0	1	0.13
Charlie Felton	1	0	1	0.25
John DeBenedictis	1	1	0	N/A
Totals:	3	1	2	0.19

Salem Housing Authority

Work Order Complete/Incomplete Report

Program(s): State 705
 Project(s): State Family 705-2A: 33 Park St./26 Prince St.
 Status: All, Status Included:Emergency, Urgent, Routine, Preventive, Vacant, Inspection UPCS, Contract, Inspection Other, Employee:
 All, Created From: 1/1/2025, Created Through: 1/31/2025, Completed Through: 12/31/9999

Work Order By Priority				
Priority	Count	Incomplete	Complete	Avg. Days
Emergency	1	0	1	5.71
Totals:	1	0	1	5.71

Work Order By Employee				
Assigned Employee	Count	Incomplete	Complete	Avg. Days
Patric Bishop	1	0	1	5.71
Totals:	1	0	1	5.71

Work Order By Priority					
Priority	Count	Incomplete	Complete	Tot. Days	Avg. Days
Emergency	2	0	2	0.42	0.21
Routine	7	1	6	34.92	5.82

Order By Employee					
Assigned Employee	Count	Incomplete	Complete	Tot. Days	Avg. Days
Alex Vega Lopez	2	0	2	9.92	4.96
Craig Powers	5	1	4	11.50	2.88
Patric Bishop	2	0	2	13.92	6.96

Work Order Complete/Incomplete Report

Program(s): State 705

Project(s): State Family 705-2B: 117 Congress St.

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

Salem Housing Authority

Work Order Complete/Incomplete Report

Program(s): State 705
 Project(s): State Family 705-3: **Farrell Court**
 Status: All, Status Included: Emergency, Urgent, Routine, Preventive, Vacant, Inspection UPCS, Contract, Inspection Other, Employee: All, Created From: 1/1/2025, Created Through: 1/31/2025, Completed From: 1/1/1900, Completed Through: 12/31/9999

Work Order By Priority					
Priority	Count	Incomplete	Complete	Tot. Days	Avg. Days
Emergency	1	0	1	1.88	1.88
Routine	2	1	1	9.08	9.08
Inspection UPCS	6	5	1	-0.04	-0.04
Totals:	9	6	3	10.92	3.64

Work Order By Employee					
Assigned Employee	Count	Incomplete	Complete	Tot. Days	Avg. Days
Alex Vega Lopez	3	1	2	1.84	0.92
Craig Powers	3	2	1	9.08	9.08
Luis Lopez	1	1	0	0.00	N/A
Patric Bishop	2	2	0	0.00	N/A
Totals:	9	6	3	10.92	3.64

Salem Housing Authority

Work Order Complete/Incomplete Report

Program(s): Federal Public Housing, State 689, State 705, State 667 +17
 Project(s): Federal Elderly: Barton and Zisson, Federal Family: 122.5 Boston, 73 Boston, 121.5 Br +41
 Status: All, Status Included: Vacant, Employee: All, Created From: 1/1/2025, Created Through: 2/1/2025, Completed From: 1/1/2025, Completed Through: 2/1/2025

Work Order By Priority						
Priority	Count	Incomplete	Complete	Tot. Days	Avg. Days	
Vacant	1	0	1	14.96	14.96	
Totals:	1	0	1	14.96	14.96	

Work Order By Employee						
Assigned Employee	Count	Incomplete	Complete	Tot. Days	Avg. Days	
Patric Bishop	1	0	1	14.96	14.96	
Totals:	1	0	1	14.96	14.96	

W/O #	Priority	Unit Address	Tenant Name	Created Date	Completed Date	Mat.	Labor	Actual	Billed
Program: State 667									
Project: State Elderly 667-7B: Dalton Building									
73975	Vacant	205 Bridge St Unit: 305		01/09/2025 08:00 AM	01/24/2025 07:56 AM	\$0.00	\$256.58	\$256.58	\$0.00

Description: repair vacancy take trash out
 Task Description: 507 - Rec vacancy for repair

State Elderly 667-7B: Dalton Building	Incomplete: 0	Complete: 1	\$0.00	\$256.58	\$256.58	\$0.00
State 667	Incomplete: 0	Complete: 1	\$0.00	\$256.58	\$256.58	\$0.00
Grand Totals:	Incomplete: 0	Complete: 1	\$0.00	\$256.58	\$256.58	\$0.00



New England

U.S. Department of Housing and Urban Development

Office of Public Housing
Boston Hub
Thomas P. O'Neill, Jr. Federal Building
10 Causeway Street
Boston, Massachusetts 02222-1092

January 15, 2025

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

Via Electronic Mail Only

Dear Ms. Hoog:

SUBJECT: Section 8 Management Assessment Program (SEMAP)
Fiscal Year Ending 9/30/2024

The purpose of this letter is to inform you of the Salem Housing Authority's (SHA's) overall SEMAP score, overall performance rating (designation), and the rating on each SEMAP indicator.

SEMAP enables HUD to better manage the Section 8 tenant-based program by identifying PHA capabilities and deficiencies related to the administration of the Section 8 Program. As a result, HUD will be able to provide more effective program assistance to PHAs.

The SHA's overall SEMAP score for the fiscal year ended September 30, 2024, is **97%**. Enclosed please find your score on each indicator. The overall SEMAP score is derived by dividing the sum of the indicator ratings by the total possible points. The SEMAP scores are rounded off to the nearest possible whole number. As a result of your overall SEMAP score of **97%**, you are hereby designated as a **High Performer**. Congratulations on your excellent performance.

If you have any questions, please contact Valarie L. Turner, Portfolio Management Specialist, at (617) 994-8417 or by electronic mail to valarie.l.turner@hud.gov.

Sincerely yours,

A handwritten signature in black ink, reading "Tai M. Pope".

Tai M. Pope
Division Director

Enclosure

SEMAP Individual Indicator Score for FYE 09/30/2024



HQ Division : Public and Indian Housing
HQ Office : PO Field Operations
Hub : 1HBOS Boston Hub
Field Office : 1APH BOSTON HUB OFFICE
Field Office HA : MA055 Salem Housing Authority

#	Indicator	Points Achieved	Maximum Points	% Achieved
1	Selection from Waiting List (24 CFR 982.54(d)(1) and 982.204(a))	15	15	100.00%
2	Reasonable Rent (24 CFR 982.4, 982.54(d)(15), 982.158(f)(7) and 982.507)	20	20	100.00%
3	Determination of Adjusted Income (24 CFR part 5, subpart F and 24 CFR 982.516)	20	20	100.00%
4	Utility Allowance Schedule (24 CFR 982.517)	5	5	100.00%
5	HQS Quality Control (24 CFR 982.405(b))	5	5	100.00%
6	HQS Enforcement (24 CFR 982.404)	10	10	100.00%
7	Expanding Housing Opportunities.	5	5	100.00%
8	Payment Standards(24 CFR 982.503)	5	5	100.00%
9	Timely Annual Reexaminations(24 CFR 5.617)	10	10	100.00%
10	Correct Tenant Rent Calculations(24 CFR 982, Subpart K)	5	5	100.00%
11	Pre-Contract HQS Inspections(24 CFR 982.305)	5	5	100.00%
12	Continuing HQS Inspections(24 CFR 982.405(a))	10	10	100.00%
13	Lease-Up	20	20	100.00%
14	Family Self-Sufficiency (24 CFR 984.105 and 984.305)	5	10	50.00%
15	Deconcentration Bonus	0	5	0.00%

FOR IMMEDIATE RELEASE

PureSky Energy Announces the Operational Launch of Three Rivers Community Solar Farm near Wilbraham, MA

Wilbraham, MA – Jan 13, 2025 – PureSky Energy (PureSky), a leader in sustainable energy solutions and independent power producer, announced today that one of their Massachusetts community solar projects, Three Rivers MA Solar (Three Rivers), has reached commercial operation. The 4.6 MWdc solar project with 2.7 MWh of battery storage is prioritizing delivering energy savings and renewable energy to low- to moderate-income households, while supporting the state's ambitious renewable energy goals.

Three Rivers MA Solar

- Location: Wilbraham, MA
- Size: 4,553 kW DC
- Battery Storage: 3 MWh
- Solar Panels: 11,674 high-efficiency units
- Estimated Annual Generation: 5,768,651 kWh.
- Estimated Homes Powered Annually: 808
- Estimated Annual Co2 Reduction: 8,544,384 lbs.
- Estimated 30-Year Customer Savings: \$ 1,905,893

"We are thrilled to partner with Salem Housing Authority to ensure that the benefits of community solar reach everyone, not just those with the means to invest in rooftop solar," says Nicholas Topping, Vice President of Community Solar at PureSky Energy. "Three Rivers Solar Farm exemplifies our commitment to expanding access to renewable energy and providing affordable energy to the vulnerable and underserved communities who need it most."

"We are pleased to work with PureSky Energy on the Three Rivers Solar Farm," says Cathy Hoog, Executive Director of Salem Housing Authority. "This partnership represents a vital step forward for many of the people we serve in our state-aided development portfolio. By supporting clean energy in Massachusetts, we are not only reducing our utility costs, but also contributing to a healthier and more sustainable future for our community."

The Salem Housing Authority serves thousands of families and individuals across Massachusetts, providing safe and affordable housing solutions. Through its support of the Three Rivers solar project, the housing authority will benefit from lower cost electricity for state-aided developments enabling it to assist the state budget by reallocating resources.

Beyond its financial benefits, the Three Rivers Solar farm is contributing to Massachusetts' transition to a greener future and supporting underserved communities with expanded access to renewable energy. Three Rivers and other solar farms like it are crucial to Massachusetts' meeting its decarbonization and clean energy goals. For more information about Three Rivers or PureSky Energy's initiatives, please visit our website: [Three Rivers Solar](#).

PureSky is committed to the Massachusetts market and has additional anchor capacity available for

upcoming community solar projects. Corporations, municipalities, organizations, and institutions interested in learning more about becoming project anchors should contact customercare@pureskyenergy.com.

About Salem Housing Authority

The Salem Housing Authority (SHA) serves thousands of residents with affordable housing solutions through on site physical affordable housing developments in Salem Massachusetts supported by state and federal resources. SHA hosts a variety of service rich programs for the people we serve through various grant programs and numerous partnerships with key community stakeholders. Salem also manages a large section 8 voucher program providing subsidy to participants that rent units in the private market in the North Shore area of Massachusetts. SHA also offers vouchers through a specialized program in partnership with the Department of Mental Health serving participants with chronic mental illness so that they can apply subsidy to units in the community. The Salem Housing Authority also manages a non-profit instrumentality, Housing Opportunities of Salem Inc., who's mission is to create additional affordable housing opportunities for those in need across Massachusetts. Through a management services agreement, SHA manages the Marblehead Housing Authority in Marblehead, Massachusetts. MHA serves 307 units of affordable public housing through on site developments in the Town of Marblehead. The partnership between the two agencies has allowed for great success in shared resources and a team approach to managing the successful operations.

About PureSky Energy:

PureSky Energy is a leading developer, owner, and operator of US community solar, C&I and storage projects with headquarters in Denver, Colorado. Since entering the US market in 2016, the company has rapidly expanded its scale and currently operates a portfolio with generation capacity of approximately 233MW across forty-four sites or under-construction projects expected to be completed in the short term. The company has a large pipeline of solar and battery storage projects across existing and new US markets, placing the platform in a primary position within the distributed generation market. The company's mission is to make clean energy accessible and affordable to local communities across the United States, while shaping a brighter, more sustainable future for generations to come.

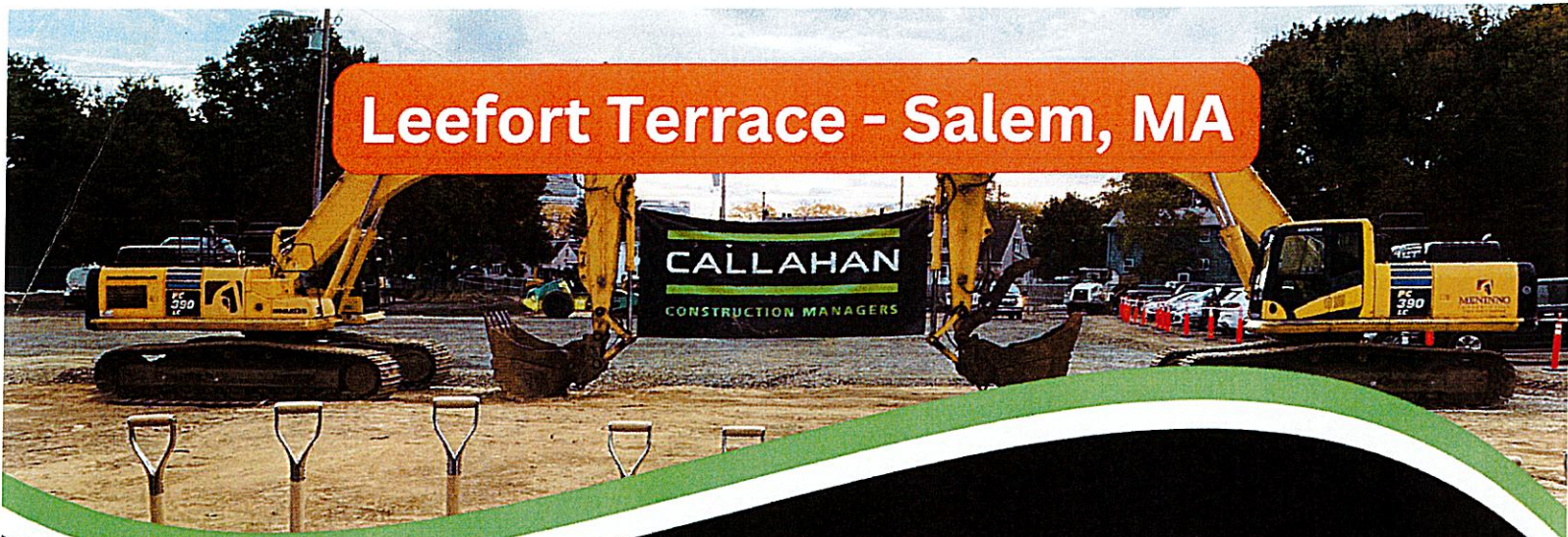
Website: www.pureskyenergy.com

Host A Solar Farm: <https://www.pureskyenergy.com/community-host> LinkedIn:
<https://www.linkedin.com/company/puresky-energy>

For media inquiries, please contact:

Janet Janzen: marketing@pureskyenergy.com

Leefort Terrace - Salem, MA



JOB FAIR

Incredible opportunity to meet contracting firms and apply for opportunities that will be part of building a new 124-unit affordable housing complex located in Salem Neck.



8:00 AM - 1:00 PM
SATURDAY MARCH, 8TH 2025



Location
136 CANAL STREET, SUITE #2
SALEM, MA

CALLING ALL...

- Laborers
- Rough Frame Carpenters
- Finish Carpenters
- Roofers
- Masons
- Roofers

Please be sure to bring copies of a resume



CALLAHAN

BEACON
communities

Salem Housing Authority

Bills January 2025

Filter Criteria Includes: 1) Type: Payment History, 2) Date Range From: 1/1/2025 Thru: 1/31/2025, 3) Program: Revolving Fund

Check Name

Aaron Paternoster

12-24: Board Comp.

\$1,251.00

Aflac

01-25: Aflac

\$476.56

AFSCME Council 93

12-29-24 Union Dues

01-05-25: Union Dues

01-12-25: Union Dues

01-19-25: Union Dues

01-26-25: Union Dues

\$439.92

Andrew M. Brockway

#258180/#4: Final

ARPA: Storm Door
replace GT /#05: A/E

\$3,000.00

Appliance Parts Center

Stove Parts

\$2,012.35

Atlas Technical Consultants

GT: Air & Mold Study

\$4,400.00

Baystate Interpreters, Inc.

11-02-24 667-5:

Interpreter

11-08-24: 667-5:

Interpreter

Sec.8: 12-30: Interpreter

\$330.00

BC Jaclen Tower Limited
Partnership

01-25: Rents

02-25: Rents

\$3,340.00

Beals and Thomas. Inc.

Gateway Cities
Walkways, landscaping
RT/#10: A/E Basic

Site work & Concrete
repair sidewalks,
parking lots, stairs
PT/#10: A/E Basic

\$6,536.91

Bell Fund VI Salem LLC

01-25: Rents

02-25: Rents

\$17,252.08

Black Earth Compost LLC

12-23-24: 4 Totes

01-20-25: 4 totes

\$152.00

BOFF LLC d/b/a Proxima
Moving & Storage

(1) Eviction

		\$3,850.00
Boston Mutual Life Ins. Co.		
	12-24: Add'l Life	
		\$367.68
Breen & Sullivan		
	86 Essex: (1) boiler Repairs	
		\$807.00
Canal Realty Development, LLC		
	Sec.8:11-04/12-03: Water & Sewer 02-25: Rent	
		\$5,064.91
Carahsoft Technology Corporation		
	S8 : 01-16-25 ID Reports	
		\$14.99
Carly C. McClain		
	12-24: Board Comp.	
		\$1,251.00
Casey Lundregan Burns, P.C.		
	All: Legal Services	
		\$17,617.21
Cassidy Landscaping LLC		
	Creative placemaking grant site improvement & Art Proj. PT #05: Construction	
		\$28,187.21
City Of Salem		
	09-24: 667.792 Gals. Fuel 10-24: 631.333 Gals. Fuel	
		\$2,861.60
City Of Salem		
	Owned: Water: 347,594.00 Cu. Ft.	
		\$42,986.55
City of Salem Off-Street Parking		
	01-28/01-26: 3 Parking Passes	
		\$810.00
Comcast		
	Internet, Cable, Cameras:Various Site	
		\$5,326.27
Commonwealth of Massachusetts		
	01-14-25:Sec.8 Toll	
		\$3.55
Commonwealth Of Massachusetts		
	01-25: Health, Opins. & LTD	
		\$10,646.30
Commonwealth Of Massachusetts/MassDOT		
	Driver's Record: (1) Employee	
		\$20.00
Crowley Cottrell, LLC		

Creative placemaking
grant site improvement
& Art Proj. PT #11: A/E
& Services

\$15,520.00

Dearborn Life Insurance
Company

02-01/03-01: STD
Insurance

\$499.35

Employee

Reimburse: Pre.2004:
11-13-24 Meeting

\$27.99

DeStefano Landscaping, LLC

01-25 Snow
Management
12-24: Snow
Management

\$49,000.00

Donald R. Famico d/b/a
M.F.G. Constables

(1) constable service

\$30.00

Doneeca v Thurston Chavez

12-24: Board Comp.

\$1,251.00

Empower Retirement

12-29-24: Deferred
Comp. "OBRA"
01-05-25: Deferred
Comp."OBRA"
01-12-25: Deferred
Comp. "OBRA"
01-19-25: Deferred
Comp. "OBRA"
01-26-25: Deferred
Comp. "OBRA"

\$1,158.81

Empower Retirement

12-29-24: Deferred
Comp.
01-05-25: Deferred
Comp.
01-12-25: Deferred
Comp.
01-19-25: Deferred
Comp.
01-26-25: Deferred
Comp.

\$6,150.00

Employee

Employee pay

\$699.48

F. W. Webb Company

Plumbing Supplies

\$4,657.91

Fairweather Preservation
Assoc. Lmt. Partnership

01-25: Rents
02-25: Rents

\$16,000.00

Fenton, Ewald & Associates,

12-24: Accounting

\$5,266.00

Forshaw, Inc.

Extermination Supplies 01/25

\$1,030.86

Great American Insurance
Co.

01-25/01-26: SHA
Officers & Director's
insurance

\$16,659.00

Greater Salem Employees
Federal Credit Union

12-29-24: Credit Union

01-05-25: Credit Union

01-12-25: Credit Union

01-19-25: Credit Union

01-26-25: Credit Union

\$3,375.00

Former Employee

Reimburse Health
Insurance Overpayment

\$1.90

Haier US Appliance Solutions,

200: 3/20" Electric
Stoves

\$1,938.00

Hayden's Safe & Lock Co.,

Zisson: Repair Entry
Door

\$110.00

Hayden's Systems, Inc.

667-5: Elevator
Inspection
667-5: Troubleshoot
Fire Alarm
Zisson: Troubleshoot
Fire Alarm

\$1,410.30

HD Supply Facilities
Maintenance

Maintenance Supplies

\$2,290.27

HD Supply Inc. f/k/a The
Home Depot Pro Instit.

Maintenance Supplies

\$4,993.62

Home Depot Commercial
Credit

GT: Hardware
RT: boiler Hoses
GT: Doors & Hardware
Maintenance Supplies

\$676.70

Intellibeam LLC

Computer,
Maintenance, Caller ID
Lines, 911, Equipment

\$33,693.06

Jilcraft Inc.

	Office supplies	\$1,037.95
Kelley Annese		
	12-04/12-18: Wellness Program	\$750.00
Employee		
	MHA Payroll	\$1,061.89
Klein Hornig LLP		
	"HOS": 09-24: Legal Services	
	"HOS" 09-05/09-06: Legal Services	
	"HOS" 11-24: Legal Services	
	PEHO II Planning Grant former LT /#32: Consultant	
	PEHO II Planning Grant former LT/#33: Consultant	\$3,018.00
Lambros S. Koulouris, d/b/a Lou's Cape Ann Paintin		
	7 units, Various locations, various size units, Paint	\$4,350.00
MacDonald Cabinet & Countertop Distributors, Inc.		
	GT: Cabinet	
	122.5 Boston: Cabinets & Countertop	
	Zisson: Cabinets	
	667-5: Cabinets	\$8,012.00
Management Computer Services, Inc.		
	2/Accounting Management Train.	\$225.00
Employee		
	01-22-25: Flex. Funds Reimbursement	
	CDBG: Reimburse: Ruane	
	01-22-25: Mileage	\$180.64
Employee		
	2024: Reimburse. Fall Tuition	\$1,920.61
MassNAHRO		
	Ad: 25 Spring Conference	
	12 Board Member Handbooks	
	Sec.8: 6/De-Escalation Webinar	
	1/SHA & 3/MHA De-Escalation	\$2,062.98
Massnahro Insurance Group		
	25-26 Worker's Comp. Insurance	\$79,003.00

N.S.H.E.D.A	01-28-24: (1) Meeting	\$50.00
NAHRO	02-25/01-26: Membership	\$1,825.74
Nan Mckay & Associates, Inc.	03-25/02-26: Housing Choice Voucher 04-25/03-26: PIH Alert	\$658.00
National Grid	Owned: 6358 KWH	\$2,309.18
National Grid	Owned: 10,102.20 Therms.	\$13,613.23
National Grid	Owned: 383,603 KWH	\$103,296.92
North of Boston Media Association	Ad: 11-27: Sec 8 Housing Coordinator Ad: 11-25-24: RSC:"NOW" Coordinator Ad: 07-15-24: MHA Laundry Bid Ad: 10-15-24: MHA Groundskeeper Ad: 12-04: MHA Master Key	\$3,018.30
NRG Business Marketing	667: 4,167.3 Therms. 200: 2,320.2 Therms.	\$3,373.50
O'D Answering Services, LLC	12-21/01-20: Answering Service	\$1,099.00
OnLine Information Services,	58 Criminal Reports 4 Income Verifications 1 Eviction Report 6 Month Verification SSV	\$3,464.25
Pioneer Bertram Tenants Association	2024-2025: LTO Annual Participation Funds	\$3,100.00
Pitney Bowes Bank Inc. Reserve Account	01-19-25: 667-5 Postage	\$5,000.00
Poland Spring Water		

	Multiple sites 10/5 Gal. Water Cups	\$105.34
Printer Pro d/b/a Encore	Service: Multiple (5) Printers	\$734.57
Quadrant Health Strategies,	New Employment Physicals: 2 Employees	\$350.00
Rafael Batista	667-7A: Deep Clean 12-24: Maintenance CDBG: Resident Charter Street CDBG: Resident 205 Bridge Street CDBG: Resident Rainbow Terrace 667-7B: Deep Clean Hallways	\$4,360.00
Reworld Sustainable Solution, LLC	12-16/12-30: Trash Disposal 01-02/01-15: Trash Disposal	\$615.19
Rogue Engineering and	ARPA: Multiple sites Fire Alarm Sys upgrade, 9 Developments/#01: A/E Basic	\$11,000.00
Romeli Kidd	12-24: Board Comp.	\$1,251.00
Rosa Clavel Carpeting Sales	4/Various sites: VCT Flooring	\$10,759.00
S&D Petroleum Inc.d/b/a	#236: Inspection & Oil Change #237: Oil Change & Tire Repair #234: Battery	\$623.56
Salem Contributory Retirement	12-29-24: Retirement 01-05-25: Retirement 01-12-25: Retirement 01-19-25: Retirement 01-26-25: Retirement	\$23,137.00
Site Improvements, Inc.		

	Gateway cities walkways, landscaping RT /#03/#04: Construction	
		\$40,270.06
Sperling Interactive		
	12-24: Website Maintenance	\$260.00
Staples Advantage		
	Pre.2004: Supplies	\$42.97
Resident		
	Zisson: Resident Reimbursement 11-21/12- 20 Electric Bill	\$91.89
T4 Construction, LLC		
	Site Work and concrete repair sidewalks, parking lots stairs : #6 Final	\$19,361.74
Tank Rescue LLC		
	117 Con: Remove Tank	\$3,195.00
TASC		
	01-02-25: TASC 01-30-25: TASC	\$3.00
The Guardian Life Insurance		
	02-01/02-28: Admin 02-01/02-28: Dental	\$2,741.45
The Norfolk Companies, Inc.		
	MHA: Countertop	\$355.50
The W. W. Williams Company LLC		
	667-5: Elevator Inspection	\$620.00
Toshiba America Business Solutions		
	77 scanner and copier services	\$1,459.00
Total Administrative Services Corp.		
	01-02-25: TASC 01-09-25: TASC 01-16-25: TASC 01-23-25: TASC 01-30-25: TASC	\$192.30
Tough Stuff Recycling, LLC		
	12-11-24: 29 Mattress Disposal	\$957.00
Triumph Roofing, Inc.		
	Zisson: Add'l Roof Repair	

		<u>\$2,420.00</u>
Uline, Inc.	Furniture: "NOW" RSC: Dominiguez	
		<u>\$1,310.54</u>
Verizon	11-11/12-10: Cell Phones 12-11/01-10: Cell Phones	
		<u>\$3,263.06</u>
Veronica Joy Miranda	12-24: Board Comp.	
		<u>\$1,251.00</u>
Votto Properties LLC.	Power: Water Damage	
		<u>\$1,500.00</u>
W. B. Mason Co., Inc.	Office Supplies	
		<u>\$3,899.00</u>
W. S. Aiken, LLC	GT: Roof Repairs	
		<u>\$8,350.00</u>
W. W. Grainger	Maintenance Supplies	
		<u>\$252.60</u>
Winer Bros.	667-5: Maintenance Supplies	
		<u>\$144.78</u>
Xcel Fire Protection, Inc.	667-5: Pump Repair	
		<u>\$840.00</u>
Harpers	01-02 Payroll	<u>\$33,830.54</u>
	State & Federal Withholding	<u>\$8,710.59</u>
	Paychex Invoice	<u>\$445.23</u>
	01-02 Payroll	<u>\$283.49</u>
	State & Federal Withholding	<u>\$47.23</u>
	01-09 Payroll	<u>\$35,619.37</u>
	State & Federal Withholding	<u>\$9,248.49</u>
	Paychex Invoice	<u>\$97.13</u>
	01-16 Payroll	<u>\$41,548.60</u>
	State & Federal Withholding	<u>\$11,069.97</u>
	Paychex Invoice	<u>\$99.23</u>
	01-23 Payroll	<u>\$43,617.21</u>
	State & Federal Withholding	<u>\$11,708.14</u>
	Paychex Invoice	<u>\$105.33</u>
	01-30 Payroll	<u>\$39,860.46</u>
	State & Federal Withholding	<u>\$10,628.55</u>
	Paychex Invoice	<u>\$113.13</u>
GRAND TOTAL:		<u><u>\$960,623.77</u></u>

FENTON, EWALD & ASSOCIATES, P.C.
CERTIFIED PUBLIC ACCOUNTANTS
280 HILLSIDE AVENUE
NEEDHAM, MA 02494-1365

OFFICE: (781) 444-6630
(800) 369-7660
FAX: (781) 444-6836
EMAIL: office@feacpa.com

To the Board of Commissioners
Salem Housing Authority
27 Charter Street
Salem, MA 01970

We have compiled the accompanying balance sheets of the Salem Housing Authority as of **December 31, 2024**, and the related statements of Revenues and Expenses for the **three** month(s) then ended. We have not audited or reviewed the accompanying financial statements and, accordingly, do not express an opinion or provide any assurance about whether the financial statements are in accordance with accounting principles generally accepted in the United States of America. The information included in the accompanying Agency Wide Revenue and Expenses and Analysis of Non-routine Expenditures and Credits are presented only for supplementary analysis purposes. Such information has been compiled from information that is the representation of management, without audit or review, and accordingly, we do not express an opinion or provide any assurance on such data.

Management is responsible for the preparation and fair presentation of the financial statements in accordance with accounting principles generally accepted in the United States of America and for the designing, implementing, and maintaining internal control relevant to the preparation and fair presentation of the financial statements.

Our responsibility is to conduct the compilation in accordance with Statements on Standards for Accounting and Review Services issued by the American Institute of Certified Public Accountants. The objective of a compilation is to assist management in presenting financial information in the form of financial statements without undertaking to obtain or provide any assurance that there are no material modifications that should be made to the financial statements.

Management has elected to omit substantially all the disclosures and the statement of cash flows required by accounting principles generally accepted in the United States of America. If the omitted disclosures were included in the financial statements, they might influence the user's conclusion about the authority's financial position, results of operations, and cash flows. Accordingly, these financial statements are not designed for those who are not informed about such matters.

Fenton, Ewald & Associates, P.C.

Needham, Massachusetts
Dated: January 21, 2025

Salem Housing Authority
3 months ending
December 31, 2024

AGENCY WIDE OPERATING STATEMENT

Fenton, Ewald & Associates, P.C.

1/21/2025

December 31, 2024		Year To Date Actual								
Account Number	Classification	Federal Conventional	Section 8 HCVP	State Consolidated 400-1	Admin. Management Program	MRVP	Total	Pro-Rated Budget	Favorable (Unfavorable)	
OPERATING RECEIPTS										
3110 Shelter Rent - Tenant		49,295		923,004			972,298	994,917	(22,619)	
3115 Shelter Rent - Federal Sect. 8				0			0	0	0	
3190 Non Dwelling Rentals		0		0			0	0	0	
3400 Administrative Fees (S8, MOB, MRVP)			487,246	0	31,710	7,315	526,271	550,427	(24,157)	
3610 Interest on Investments - Unrestricted		8,242	6,448	14,598	0	150	29,438	3,188	26,250	
3611 Interest on Investments - Restricted				0		0	0	0	0	
3690 Other Revenue		8,126	23,103	9,938	4,751	0	45,919	69,936	(24,018)	
3950 Operating Grants				0			0	0	0	
3691 Other Revenue Retained				49,982		0	49,982	34,900	15,083	
3801 Operating Subsidy		31,478		303,547		203,465	538,490	1,043,228	(504,738)	
TOTAL OPERATING RECEIPTS		97,140	516,798	1,301,069	36,461	210,930	2,162,398	2,696,596	(534,198)	
OPERATING EXPENDITURES										
ADMINISTRATIVE										
4110 Administration Salaries		9,353	303,121	201,408	20,250	2,276	536,408	425,864	(110,545)	
4120 Compensated Absences		0	0	0	0	0	0	11,726	11,726	
4130 Legal		317	20,638	70,118	0	26	91,099	43,125	(47,974)	
4140 Compensation-Board Members				6,485		0	6,485	6,019	(466)	
4150 Travel And Related Expenses		724	22	2,087	0	0	2,832	4,500	1,668	
4170 Accounting Services		2,607	6,732	4,727	0	278	14,344	15,961	1,617	
4171 Audit Services		111	3,868	3,443	0	78	7,500	7,000	(500)	
4180 Office Rent		0	16,098	0		0	16,098	21,075	4,977	
4190 Administrative Other		3,838	76,243	49,762	3,381	834	134,058	145,494	11,436	
4190.1 Mixed Population Salary			0	0		0	0	18,987	18,987	
TOTAL ADMINISTRATIVE EXPENSE		16,951	426,722	338,030	23,631	3,492	808,825	699,749	(109,076)	
4230 Resident Services		0		7,076		0	7,076	1,258	(5,818)	
UTILITIES										
4310 Water & Sewer		5,868		119,798			125,666	127,294	1,628	
4320 Electricity		5,715		159,582			165,297	273,361	108,063	
4330 Gas		3,338		10,211			13,549	35,032	21,483	
4340 Fuel		0		0			0	0	0	
4360 Energy Conservation		0		0			0	0	0	
4390 Other		0		0			0	0	0	
TOTAL UTILITIES EXPENSE		14,921	0	289,591	0	0	304,512	435,686	131,174	
ORDINARY MAINTENANCE										
4410 Maintenance Labor		11,314		184,456			195,771	219,634	23,863	
4420 Materials And Supplies		6,459		75,472			81,931	79,500	(2,431)	
4430 Contract Costs		9,030		95,396			104,426	123,500	19,074	
TOTAL ORDINARY MAINTENANCE		26,804	0	355,325	0	0	382,128	422,634	40,506	
GENERAL EXPENSE										
4510 Insurance		13,334	10,158	65,936	519	54	90,000	480,918	390,918	
4520 Pilot		3,437		3,330			6,767	5,924	(843)	
4540 Employee Benefits		10,248	97,423	167,042	9,136	896	284,745	258,734	(26,011)	
4570 Collection Losses		0		6,143		0	6,143	8,000	1,857	
4590 COVID related Costs			0	0		0	0	0	0	
4580/90 Other General Expenses - Port Out Fees		0	39,970				39,970	40,000	30	
TOTAL GENERAL EXPENSES		27,019	147,551	242,450	9,655	950	427,626	793,577	365,951	
TOTAL OPERATING EXPENSES		85,694	574,273	1,232,472	33,286	4,442	1,930,167	2,352,903	422,736	
NET INCOME (DEFICIT) BEFORE SUBSIDY and NON-ROUTINE EXPENSES										
		(20,032)	(57,475)	(234,950)	3,175	3,023	(306,259)	(699,536)	393,276	
NET INCOME (DEFICIT) BEFORE NON-ROUTINE, and INCLUDING SUBSIDY										
		11,446	(57,475)	68,597	3,175	206,488	232,231	343,693	(111,462)	
NONROUTINE EXPENSES AND (CREDITS)										
4610 Extraordinary Maintenance / Direct Use of Reserves		35,631	0	51,468		0	87,099	68,750	(18,349)	
4611 Equip. Purchased - Non Capitalized				20,850		0	20,850	11,500	(9,350)	
4612 Restricted Reserve Expenditures				0		0	0	0	0	
4715 Housing Assistance Payments				0		203,465	203,465	203,465	0	
7520 Replacement of Equipment		0	0	0			0	50,250	50,250	
7540 Betterments & Additions		0		0			0	0	0	
4801 Depreciation Expense				0			0	0	0	
TOTAL NONROUTINE EXPENSES		35,631	0	72,319	0	203,465	311,415	333,965	22,550	
2700 NET INCOME (DEFICIT)		(24,185)	(57,475)	(3,722)	3,175	3,023	(79,184)	9,728	(88,911)	

See Accountants' Compilation Report

Salem Housing Authority
PROJECT MA06-P055-003,7
BALANCE SHEET - December 31, 2024

ASSETS

CASH - GENERAL FUND - DEV AND/OR OPS	\$ 662,514.15	
PETTY CASH	0.00	\$ 662,514.15
ACCOUNTS RECEIVABLE TENANTS - Net	6,275.61	
ALLOWANCE FOR DOUBTFUL ACCOUNTS - TENANTS	(3,130.25)	
ACCOUNTS RECEIVABLE - HUD	0.00	
ACCOUNTS RECEIVABLE - Other	0.00	3,145.36
ADVANCE - LIMITED REV FUND		25,000.00
PREPAID INSURANCE	50,151.00	
INVENTORY - MATERIALS	0.00	
DEFERRED CHARGES - OTHER	0.00	
DEFERRED CHARGES - RETIREMENT	9,900.00	
INTERPROGRAM DUE TO / DUE FROM	0.00	60,051.00
ACCUMULATED DEPRECIATION - STRUCTURES & EQUIP	(3,272,211.45)	
LAND	258,293.38	
BUILDINGS	3,419,497.90	
FURNITURE, EQUIP AND MACH - DWELLINGS	0.00	
FURNITURE, EQUIP AND MACH - ADMIN	23,218.00	
WORK IN PROGRESS	400,595.05	
BUILDINGS - EQ. TRANSFERRED IN	0.00	
DEFERRED OUTFLOW OF RESOURCES	67,300.00	896,692.88

TOTAL ASSETS

\$ 1,647,403.39

LIABILITIES AND SURPLUS

ACCOUNTS PAYABLE	\$ -	
BID DEPOSIT	0.00	
TENANT PET DEPOSITS	522.39	
ACCOUNTS PAYABLE - HUD	0.00	
PREPAID RENTS	2,952.00	
ACCOUNTS PAYABLE REV FUND	494,422.25	\$ 497,896.64
ACCRUED PAYROLL	2,281.78	
ACCRUED OTHER	69,171.40	
ACCRUED COMPENSATED ABSCENCES	10,762.96	
ACCRUED PILOT	3,437.38	85,653.52
DEFERRED INFLOWS	74,788.00	74,788.00
ACCRUED OPEB LIABILITY	133,014.00	
NET PENSION LIABILITY	133,654.00	266,668.00
INVESTMENT IN CAPITAL ASSETS, NET OF RELATED DEBT	829,392.88	
UNRESTRICTED NET ASSETS 75% of Max	191,345.05	
UNRESTRICTED NET ASSETS - OPEB	(168,429.00)	
UNRESTRICTED NET ASSETS - Pension Liab	(105,727.00)	
OPERATING TRANSFERS IN	0.00	746,581.93
CURRENT YEAR NET INCOME (DEFICIT)		(24,184.70)
OPEB and PENSION RELATED EXPENSES		0.00
PYA NOT AFFECTING RESIDUAL RECEIPTS		0.00
GAIN OR LOSS ON SALE OF EQUIP.		0.00
EXPENDITURES FOR PROPERTY - CONTRA		0.00

TOTAL LIABILITIES AND SURPLUS

\$ 1,647,403.39

Salem Housing Authority		MA06-P055-003.7		39	units	FENTON, EWALD & ASSOCIATES, P.C.		
3 months ending		12/31/2024		117	unit months	21-Jan-25		
						PSP		
						ACTUAL		
						AS A		
						FACTOR OF		
						PRO RATA		
						AVAILABLE		
						REMAINDER		
						OF YEAR		
ACCOUNT	APPROVED	PRO RATA	BUDGET	ACTUAL	ACTUAL			
NUMBER CLASSIFICATION	BUDGET	BUDGET		TO DATE	TO DATE	Favorable		
	AMOUNT	3 Months	P.U.M.	P.U.M.	AMOUNT	(Unfavorable)		
OPERATING RECEIPTS								
3110 Dwelling Receipts	173,941	43,485	371.67	421.32	49,294.50	5,809	1.134	124,647
3120 Excess Utilities	0	0	0.00	0.00	0.00	0		0
3190 Non-dwelling Rent	0	0	0.00	0.00	0.00	0		0
3610 Interest Income	2,000	500	4.27	70.44	8,241.82	7,742	16.484	(6,242)
3690 Other Income	21,500	5,375	45.94	69.45	8,126.00	2,751	1.512	13,374
7530 Sale of Equipment	0	0	0.00	0.00	0.00	0		0
TOTAL OPERATING RECEIPTS	197,441	49,360	421.88	561.22	65,662.32	16,302	1.330	131,779
OPERATING EXPENDITURES								
ADMINISTRATIVE								
4110 Salaries	37,075	9,269	79.22	79.94	9,353.26	(85)	1.009	27,722
4120 Compensated Absences	905	226	1.93	0.00	0.00	226	0.000	905
4130 Legal	5,000	1,250	10.68	2.71	317.26	933	0.254	4,683
4150 Travel	336	84	0.72	6.19	723.87	(640)	8.618	(388)
4170 Accounting Services	9,936	2,484	21.23	22.28	2,607.00	(123)	1.050	7,329
4171 Audit Fees	411	103	0.88	0.95	111.00	(8)	1.080	300
4180 Office Rent	808	202	1.73	0.00	0.00	202	0.000	808
4190 Sundry Admin	12,354	3,089	26.40	32.81	3,838.43	(750)	1.243	8,516
TOTAL ADMINISTRATIVE EXPENSE	66,825	16,706	142.79	144.88	16,950.82	(245)	1.015	49,874
4230 RESIDENT SERVICES	975	244	2.08	0.00	0.00	244	0.000	975
UTILITIES								
4310 Water	22,729	5,682	48.57	50.15	5,867.56	(185)	1.033	16,861
4320 Electricity	34,293	8,573	73.28	48.85	5,715.12	2,858	0.667	28,578
4330 Gas	14,951	3,738	31.95	28.53	3,338.04	400	0.893	11,613
4340 Fuel	0	0	0.00	0.00	0.00	0		0
4350 Utility Labor	0	0	0.00	0.00	0.00	0		0
4390 Other Utility Expenses	0	0	0.00	0.00	0.00	0		0
TOTAL UTILITIES EXPENSE	71,973	17,993	153.79	127.53	14,920.72	3,073	0.829	57,052
ORDINARY MAINTENANCE								
4410 Labor	53,464	13,366	114.24	96.71	11,314.49	2,052	0.847	42,150
4420 Materials And Supplies	18,000	4,500	38.46	55.21	6,459.16	(1,959)	1.435	11,541
4430 Contract Costs	48,000	12,000	102.56	77.18	9,029.90	2,970	0.752	38,970
TOTAL ORDINARY MAINTENANCE	119,464	29,866	255.26	229.09	26,803.55	3,062	0.897	92,660
4480 PROTECTIVE SERVICES	0	0	0.00	0.00	0.00	0		0
GENERAL EXPENSES								
4510 Insurance	109,600	27,400	234.19	113.97	13,334.00	14,066	0.487	96,266
4520 Pilot	10,197	2,549	21.79	29.38	3,437.38	(888)	1.348	6,760
4530 Terminal Leave Payments	0	0	0.00	0.00	0.00	0		0
4540 Employee Benefits	36,326	9,082	77.62	87.59	10,247.74	(1,166)	1.128	26,078
4541 Employee Benefits - OPEB	0	0	0.00	0.00	0.00	0		0
4542 Employee Benefits - Pension	0	0	0.00	0.00	0.00	0		0
4570 Collection Losses	2,000	500	4.27	0.00	0.00	500	0.000	2,000
4590 Sundry	0	0	0.00	0.00	0.00	0		0
TOTAL GENERAL EXPENSES	158,123	39,531	337.87	230.93	27,019.12	12,512	0.683	131,104
TOTAL ROUTINE EXPENSES	417,360	104,340	891.79	732.43	85,694.21	18,646	0.821	331,666
NONROUTINE EXPENSES								
4610 Nonroutine Maintenance	25,000	6,250	53.42	304.54	35,630.97	(29,381)	5.701	(10,631)
7520 Replacement of Equip	3,000	750	6.41	0.00	0.00	750	0.000	3,000
7540 Betterments & Additions	0	0	0.00	0.00	0.00	0		0
TOTAL NONROUTINE EXPENDITURES	28,000	7,000	59.83	304.54	35,630.97	(28,631)	5.090	(7,631)
Prior Yr. Adj. Affect Res. Rec.	0	0	0.00	0.00	0.00			
TOTAL OPERATING EXPENSES	445,360	111,340	951.62	1,036.97	121,325.18	(9,985)	1.090	324,035
NET INCOME(DEFICIT) BEFORE SUBSIDY	(247,919)	(61,980)	(529.74)	(475.75)	(55,662.86)	6,317		
8020 Operating Subsidy	193,033	48,258	412.46	269.04	31,478.16	(16,780)	0.652	161,555
8020 Capital Fund	0	0	0.00	0.00	0.00	0		0
RESIDUAL RECEIPTS (DEFICIT)	(54,886)	(13,722)	(117.28)	(206.71)	(24,184.70)	(10,463)		

See Accountants' Compilation Report

HUD-52598					
ANALYSIS OF NONROUTINE EXPENDITURES					
Name of Local Authority Salem Housing Authority				Fiscal Year Ending Date 9/30/25	
Locality 27 Charter Street				Report for Period Ended 12/31/2024	
Development Nos. MA06-P055-003,7				Contract Nos. B-1632	
Part II - Analysis Of Expenditures For Extraordinary Maintenance, Replacement Of Equipment, And Property Betterments And Additions					
WORK PROJECT NUMBER	Salem Housing Authority JOB DESCRIPTION	PROJECT NUMBER	TOTAL BUDGETED COST	ACTUAL COST	
				Current Year	% Complete
	EXTRAORDINARY MAINTENANCE - ACCOUNT 4610				
	Turnover		25,000	35,630.97	
	Total - Account 4610		25,000	35,630.97	
	PRIOR YEAR ADJUSTMENTS - ACCOUNT 6010				
	Total - Account 6010			0.00	
	REPLACEMENT OF NONEXPENDABLE EQUIP. - ACCT. 7520				
	Stoves		3,000		
	Total - Account 7520		3,000	0.00	
	PROPERTY BETTERMENTS AND ADDITIONS - ACCT. 7540				
	Total - Account 7540		0	0.00	
Prepared by:					
Signature:		Fenton, Ewald & Associates, PC			
Title:		Fee Accountants	Date	01/21/25	

SALEM HOUSING AUTHORITY
SECTION 8 VOUCHER
BALANCE SHEET - DECEMBER 31, 2024

ASSETS

Cash - Voucher	\$1,787,157.24	
Petty Cash	0.00	\$1,787,157.24
Accounts Receivable - Hud	0.00	
Accounts Receivable (Payable) - Mobilities	3,426.23	
Accounts Receivable -Fraud	249,556.70	
Accounts Receivable -Interprogram	0.00	252,982.93
Advances To Revolving Fund		60,000.00
Investments	0.00	
FSS Escrow Balances	26,456.94	26,456.94
Prepaid Insurance	2,611.00	
Deferred Outflows - Retirement	100,476.00	
Deferred Charges -Other	10,087.80	
Deferred Expenses - COVID-19 Related	0.00	113,174.80
Land, Structures And Equipment - Net		618,496.51
Deferred Outflow of Resources		646,051.00
<u>TOTAL ASSETS</u>		<u>\$3,504,319.42</u>

LIABILITIES AND SURPLUS

Accounts Payable - Revolving Fund	(\$416,717.64)	
Accounts Payable - HUD	115,891.00	
Current Portion Capital Project/Mortgage	39,408.00	(\$261,418.64)
Accrued Compensated Absences - Current	66,029.80	
Accrued Payroll	20,962.36	
Accrued Liabilities	57,335.82	
Fss Escrow	26,456.94	170,784.92
Deferred Fraud Income Charges	249,556.70	
Accrued Compensated Absences - Non-Current	73,631.98	
Long Term Portion Capital Project/Mortgage	327,781.00	
Accrued OPEB Liability	1,354,086.00	
Accrued Pension Liability	1,322,773.00	
Deferred Inflows of resources	752,821.00	4,080,649.68
Invested in Capital Assets - net	251,307.51	
Unrestricted Net Assets - Admin	2,069,941.75	
Unrestricted Net Assets - OPEB	(1,714,606.00)	
Unrestricted Net Assets - Pension	(1,069,023.00)	
Restricted Net Assets - HAPs	147,579.00	(314,800.74)
HUD PHA Grants - HAPs	5,895,422.00	
Less HAP Expenses	(6,026,733.00)	
Plus: Interest on HAP Reserves		
Plus: Fraud Receipts - HAP portion	17,890.50	(113,420.50)
Expenditures for Equipment - Contra		0.00
Depreciation Expense		0.00
Net Surplus (Deficit) from Operations		(57,475.30)
<u>TOTAL LIABILITIES AND SURPLUS</u>		<u>\$3,504,319.42</u>

See Accountants' Compilation Report

PSP
21-Jan-25

SALEM HOUSING AUTHORITY
SECTION 8 VOUCHER
MONTHLY OPERATING STATEMENT
3 Months Ending December 31, 2024

1/21/25

PSP

Fenton, Ewald & Associates, P.C.

COMPUTATION OF ADMINISTRATIVE FEE EARNED:

	1st 600	rate	HUD % funding	> 600	rate	HUD % funding	
Oct	600	152.40	91.900%	617	142.23	91.900%	164,681.00
Nov	600	152.40	91.900%	596	142.23	91.900%	161,936.00
Dec	600	152.40	91.900%	586	142.23	91.900%	160,629.00
Jan	-	152.40	91.900%	-	142.23	91.900%	0.00
Feb	-	152.40	91.900%	-	142.23	91.900%	0.00
Mar	-	152.40	91.900%	-	142.23	91.900%	0.00
Apr	-	152.40	91.900%	-	142.23	91.900%	0.00
May	-	152.40	91.900%	-	142.23	91.900%	0.00
Jun	-	152.40	91.900%	-	142.23	91.900%	0.00
Jul	-	152.40	91.900%	-	142.23	91.900%	0.00
Aug	-	152.40	91.900%	-	142.23	91.900%	0.00
Sep	-	152.40	91.900%	-	142.23	91.900%	0.00
HUD Retro admin Fee - prior year							0.00
							487,246.00
1,800 3,599 1,799							
CARES Act Administrative Fees							0.00
TOTAL ADMINISTRATIVE FEE EARNED							487,246.00

STATEMENT OF OPERATING RECEIPTS AND EXPENDITURES

	BUDGET	PRO RATA BUDGET 3 months	ACTUAL 3 months	Favorable (Unfavorable)	% favorable (unfavorable)
ADMINISTRATIVE FEE EARNED	2,058,796	514,699	487,246.00	(27,453.00)	-5.3%
INTEREST ON RESERVE FUNDS INVESTED	5,000	1,250	6,448.33	5,198.33	415.9%
MOBILITY FEE INCOME	23,245	5,811	4,737.98	(1,073.27)	-18.5%
FRAUD RECOVERY RECEIPTS	80,000	20,000	17,890.50	(2,109.50)	-10.5%
FSS COORDINATOR	105,000	26,250	0.00	(26,250.00)	-100.0%
OTHER INCOME	0	0	475.00	475.00	
TOTAL OPERATING RECEIPTS	2,272,041	568,010	516,797.81	(51,212.44)	-9.0%
ADMINISTRATIVE SALARIES	919,947	229,987	303,120.65	(73,133.90)	-24.1%
COMPENSATED ABSENCES	45,997	11,499	0.00	11,499.25	
LEGAL	45,000	11,250	20,637.63	(9,387.63)	-45.5%
TRAVEL	11,603	2,901	22.05	2,878.70	13055.3%
ACCOUNTING	27,660	6,915	6,732.00	183.00	2.7%
AUDIT FEE	14,181	3,545	3,868.00	(322.75)	-8.3%
OFFICE RENT	83,492	20,873	16,098.21	4,774.79	29.7%
SUNDRY ADMINISTRATIVE	380,638	95,160	76,243.29	18,916.21	24.8%
DIRECT CHARGES TO PRE 2004 RESERVES	0	0	0.00	0.00	
INSURANCE	46,642	11,661	10,157.50	1,503.00	14.8%
EMPLOYEE BENEFITS	368,748	92,187	97,423.48	(5,236.48)	-5.4%
COVID19-related expenses	0	0	0.00	0.00	
OTHER GENERAL EXPENSES Ports Out Admin Fee	160,000	40,000	39,970.30	29.70	0.1%
TOTAL ROUTINE NON-HAP EXPENSES	2,103,908	525,977	574,273.11	(48,296.11)	-8.4%
NET INCOME BEFORE NONROUTINE	168,133	42,033	(57,475.30)	(99,508.55)	-236.7%
DIRECT CHARGES TO PRE 2004 RESERVES	0	0	0.00	0.00	
EMPLOYEE BENEFITS OPEB	0	0	0.00	0.00	
EMPLOYEE BENEFITS Pension	0	0	0.00	0.00	
EXPENDITURES FOR EQUIPMENT	0	0	0.00	0.00	
TOTAL NONROUTINE EXPENSES	0	0	0.00	0.00	
NET OPERATING INCOME (LOSS)	168,133	42,033	(57,475.30)	(99,508.55)	

(57,475.30)

COMPUTATION OF EXCESS OR DEFICIENCY OF FUNDS RECEIVED

		Voucher
4715	HOUSING ASSISTANCE PAYMENTS (HAPs)	6,026,733.00
	less: Fraud Receipts - HAP portion Max ACC	(17,890.50)
	less: Interest Earned on Excess Funds - HAP portion	
	TOTAL ANNUAL CONTRIBUTION USED TO DATE percent used	101.9% 6,008,842.50
3801	AMOUNT OF ACC GRANT RECEIVED FROM HUD	5,895,422.00
	Amount (OVER) / UNDER Utilized	(113,420.50)

See Accountants' Compilation Report

SALEM HOUSING AUTHORITY

ABA Fund Limits, Amounts Available, Amounts Used and Balances Remaining

ABA Fund Limits, Amounts Available, Amounts Used and Balances Remaining

[illegible]

DEPARTMENT OF HOUSING & COMMUNITY DEVELOPMENT
BALANCE SHEET

Salem Housing Authority
12/31/2024 Period Ended
4001 Program Number

ACCOUNT NUMBER	ASSETS		X Administration Modernization 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	805,777.58	
1112.1	Cash Administration Fund - Restricted	0.00	
1113	Cash - Escrow	0.00	
1114	Pet Deposit Fund Cash	8,265.94	
1117	Petty Cash	100.00	
1118	Change Fund	0.00	814,143.52
ACCOUNTS RECEIVABLE			
1121	Federal and DHCD--Section 8 Subsidy-Shelter Rent	0.00	
1122	Tenants Accounts Receivable	143,210.15	
1122.1	Tenants Accounts Receivable - Repayment (Contra)	0.00	
1123	Allowance for Doubtful Accounts - Dwelling Rents	(49,612.93)	
1124	Accounts Receivable - Fraud/Retroactive	111,593.58	
1124.1	Fraud/Retroactive- Contra	(111,593.58)	
1125	Accounts Receivable Subsidy	271,047.00	
1129	Accounts Receivable - Other Federal	0.00	
1130	Interprogram Due From	350,000.00	
1131	Allowance for Doubtful Accounts - Other	0.00	
1145	Accrued Interest Receivable	0.00	714,644.22
INVESTMENTS			
1162	Investments - Unrestricted		3,267,532.42
DEFERRED CHARGES			
1211	Prepaid Expenses	193,180.00	
1212	Inventory/Net - Supplies	0.00	
1290	Deferred Charges - Other	1,206,899.00	1,400,079.00
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	(38,297,772.06)	
1407	Infrastructure	0.00	
1408	Capital Leases		5,469,335.60
TOTAL ASSETS			11,665,734.76
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	Pet Deposits	8,265.94	
2115	Bid Deposits	0.00	
2117	Employee's Payroll Deductions	0.00	
2118	Accounts Payable - Subsidy Overpayment	1,919,924.00	
2119	Accounts Payable - Interfund	684,380.47	
2120	Accounts Payable - Other	0.00	2,612,570.41
ACCRUED LIABILITIES			
2130.2	Accrued Contingent Liability	0.00	
2135	Accrued Compensated Absences - Current Portion	80,844.46	
2137	Payment in Lieu of Taxes (PILOT)	3,330.00	
2138	Accrued Payroll	26,770.31	
2139	Accrued Liabilities - Other	160,173.39	271,118.16
DEFERRED CREDITS			
2240	Tenants Prepaid Rents	79,190.37	
2290	Undistributed Credits	26,487.00	
2291	Deferred Revenue - Subsidy	0.00	
2292	Deferred Revenue - Other	1,212,519.00	1,318,196.37
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	90,152.30	
2339	Other Non-Current Liabilities	0.00	
2339.1	Accrued OPEB Liability	4,244,626.00	4,334,778.30
EQUITY (NET ASSETS)			
	Unrestricted		
2700	Net Income (Deficit)	(3,721.72)	
2802	Invested in Capital Assets, net of Related Debt	5,469,335.60	
2805	Net Assets - Restricted	0.00	
2806	Net Assets - Unrestricted	Max % 58.84%	2,075,565.64
2806.1	Net Assets - OPEB	(4,412,108.00)	3,129,071.52
TOTAL LIABILITIES AND EQUITY			11,665,734.76

See Accountants' Compilation Report

Salem Housing Authority		4001		676	units	Fenton, Ewald & Associates, P.C.			
3 months ending				2028	unit months	PSP			
December 31, 2024				01/21/25					
Number	Account Classification	Approved Budget Amount	Pro Rata Budget 3 Months	Budget P.U.M.	Actual To Date P.U.M.	Actual To Date Amount	Amount Favorable (Unfavorable)	Actual As a Factor of Pro Rata	Available Remainder of the Year
OPERATING RECEIPTS									
3110	Shelter Rent - Tenant	3,805,728	951,432	469.15	455.13	923,003.84	(28,428)	0.970	2,882,724
3115	Shelter Rent - Federal Sect. 8	0	0	0.00	0.00	0.00	0		0
3190	Non Dwelling Rentals	0	0	0.00	0.00	0.00	0		0
3400	Administrative Fees - MRVP	0	0	0.00	0.00	0.00	0		0
3610	Interest on Investments - Unrestricted	5,000	1,250	0.62	7.20	14,597.67	13,348	11.678	(9,598)
3611	Interest on Investments - Restricted	0	0	0.00	0.00	0.00	0		0
3690	Other Revenue	40,000	10,000	4.93	4.90	9,938.19	(62)	0.994	30,062
3950	Operating Grants	0	0	0.00	0.00	0.00	0		0
3691	Other Revenue Retained	139,598	34,900	17.21	24.65	49,982.38	15,083	1.432	89,616
3692	Restricted Reserve Transfer	0	0	0.00	0.00	0.00	0		0
3693	Other Revenue - Net Metering	0	0	0.00	0.00	0.00	0		0
3801	Operating Subsidy	3,166,019	791,505	390.29	149.68	303,547.00	(487,958)	0.384	2,862,472
TOTAL OPERATING RECEIPTS		7,156,345	1,789,086	882.19	641.55	1,301,069.08	(488,017)	0.727	5,855,276
OPERATING EXPENDITURES									
ADMINISTRATIVE									
4110	Administration Salaries	657,035	164,259	81.00	99.31	201,408.14	(37,149)	1.226	455,627
4120	Compensated Absences	0	0	0.00	0.00	0.00	0		0
4130	Legal	120,000	30,000	14.79	34.58	70,118.44	(40,118)	2.337	49,882
4140	Compensation-Board Members	24,075	6,019	2.97	3.20	6,485.00	(466)	1.077	17,590
4150	Travel And Related Expenses	6,061	1,515	0.75	1.03	2,086.51	(571)	1.377	3,974
4170	Accounting Services	19,358	4,840	2.39	2.33	4,727.00	113	0.977	14,631
4171	Audit Services	13,124	3,281	1.62	1.70	3,443.00	(162)	1.049	9,681
4180	Penalties & Interest	0	0	0.00	0.00	0.00	0		0
4190	Administrative Other	182,983	45,746	22.56	24.54	49,762.27	(4,017)	1.088	133,221
4190.1	Mixed Population	75,948	18,987	9.36	0.00	0.00	18,987	0.000	75,948
4191	Resident Services	4,056	1,014	0.50	3.49	7,075.92	(6,062)	6.978	(3,020)
TOTAL ADMINISTRATIVE EXPENSE		1,102,640	275,660	135.93	170.17	345,106.28	(69,446)	1.252	757,534
UTILITIES									
4310	Water & Sewer	486,445	121,611	59.97	59.07	119,798.31	1,813	0.985	366,647
4320	Electricity	1,059,149	264,787	130.57	78.69	159,582.09	105,205	0.603	899,567
4330	Gas	125,175	31,294	15.43	5.03	10,210.60	21,083	0.326	114,964
4340	Fuel	0	0	0.00	0.00	0.00	0		0
4360	Energy Conservation	0	0	0.00	0.00	0.00	0		0
4390	Other	0	0	0.00	0.00	0.00	0		0
4391	Solar Operator Costs	0	0	0.00	0.00	0.00	0		0
4392	Net Meter Utility Credit (Negative Number)	0	0	0.00	0.00	0.00	0		0
TOTAL UTILITIES EXPENSE		1,670,769	417,692	205.96	142.80	289,591.00	128,101	0.693	1,381,178
ORDINARY MAINTENANCE									
4410	Maintenance Labor	825,072	206,268	101.71	90.95	184,456.42	21,812	0.894	640,616
4420	Materials And Supplies	300,000	75,000	36.98	37.21	75,471.86	(472)	1.006	224,528
4430	Contract Costs	446,000	111,500	54.98	47.04	95,396.49	16,104	0.856	350,604
TOTAL ORDINARY MAINTENANCE		1,571,072	392,768	193.67	175.21	355,324.77	37,443	0.905	1,215,747
GENERAL EXPENSE									
4510	Insurance	1,764,490	441,123	217.52	32.51	65,935.50	375,187	0.149	1,698,555
4520	Pilot	13,500	3,375	1.66	1.64	3,330.00	45	0.987	10,170
4540	Employee Benefit Contr.	594,054	148,514	73.23	82.37	167,041.79	(18,528)	1.125	427,012
4541	Employee Benefit Contr. OPEB	0	0	0.00	0.00	0.00	0		0
4570	Collection Losses	30,000	7,500	3.70	3.03	6,142.65	1,357	0.819	23,857
4580/90	Interest & Other General Exp COVID-19	0	0	0.00	0.00	0.00	0		0
TOTAL GENERAL EXPENSES		2,402,044	600,511	296.11	119.55	242,449.94	358,061	0.404	2,159,594
TOTAL OPERATING EXPENSES		6,746,525	1,686,631	831.67	607.73	1,232,471.99	454,159	0.731	5,514,053
NET INCOME (DEFICIT) BEFORE SUBSIDY and NON-ROUTINE Expenses		(2,756,199)	(689,050)	-339.77	-115.85	(234,949.91)	454,100	0.341	(2,521,249)
NET INCOME (DEFICIT) before NON-ROUTINE, and INCLUDING SUBSIDY		409,820	102,455	50.52	33.82	68,597.09	(33,858)	0.670	341,223
NONROUTINE EXPENSES AND (CREDITS)									
4610	Extraordinary Maintenance	250,000	62,500	30.82	25.38	51,468.37	11,032	0.823	198,532
4611	Equip. Purchased - Non Capitalized	46,000	11,500	5.67	10.28	20,850.44	(9,350)	1.813	25,150
4612	Restricted Reserve (Grant) Expenditures	0	0	0.00	0.00	0.00			
4715	Housing Assistance Payments	0	0	0.00	0.00	0.00			
TOTAL NONROUTINE EXPENSES		296,000	74,000	36.49	35.66	72,318.81	1,681		
CAPITAL EXPENDITURES									
7520	Replacement of Equipment-Capitalized	198,000	49,500	24.41	0.00	0.00	49,500		
7540	Betterments & Additions - Capitalized	0	0	0.00	0.00	0.00	0		
TOTAL CAPITAL EXPENDITURES		198,000	49,500	24.41	0.00	0.00	49,500		
NET INCOME (DEFICIT) FROM OPERATIONS		(84,180)	(21,045)	-10.38	-1.84	(3,721.72)	17,323		
4801	Depreciation Expense	0	0	0.00	0.00	0.00			
4541	Employee Benefits - GASB 75	0	0	0.00	0.00	0.00			
4542	Pension Expense - GASB 68	0	0	0.00	0.00	0.00			
NET CHANGE IN NET ASSETS		(84,180)	(21,045)	-10.38	-1.84	(3,721.72)	17,323		
								Operating Subsidy Earned year-to-date \$303,547	
								Operating Subsidy Rec'd year-to-date \$32,500	
								Amount (Over) or Under Subsidized \$271,047	

Operating Subsidy Earned
year-to-date **\$303,547**

Operating Subsidy Rec'd
year-to-date **\$32,500**

Amount (Over) or Under
Subsidized **\$271,047**

ANALYSIS OF NONROUTINE EXPENDITURES AND CREDITS

Name of Local Authority

Salem Housing Authority

Fiscal Year Ending Date

9/30/2025

[illegible]

4001

Report for Period Ended

December 31, 2024

[illegible]

**Salem Housing Authority
Management Fund
Balance Sheet - December 31, 2024**

Assets

Cash - Management Services		\$0.00
A/R - Marblehead Housing Authority	21,139.70	
A/R - Revolving Fund	<u>108,842.14</u>	129,981.84
Deferred Charges - Prepaid Expenses		8,999.00
Fixed Assets - Net		0.00
Deferred Outflows of Resources		30,122.00
Total Assets		<u><u>\$169,102.84</u></u>

Liabilities and Surplus

Accounts Payable - Vendors		\$0.00
Accounts Payable - Revolving Fund		0.00
Accrued Compensated Absences	8,696.26	
Accrued Payroll	1,557.70	
Other Accrued Liabilities	<u>5,190.88</u>	15,444.84
Accrued OPEB Liability		119,333.00
Accrued Pension Liability		0.00
Deferred Inflows of Resources		61,893.00
Unrestricted Net Assets	120,361.18	
Invested in Capital Assets	0.00	
OPEB Reserves - GASB 75	(151,104.00)	
Pension Reserves - GASB 68	<u>0.00</u>	(30,742.82)
Net Income (Deficit) - Current Year		3,174.82
Total Liabilities and Surplus		<u><u>\$169,102.84</u></u>

See Accountants' Compilation Report

**Salem Housing Authority
Management Fund
Monthly Operating Statement**

3 months ending December 31, 2024

Fenton, Ewald & Associates, P.C.

Account Number	Classification	Approved Budget Amount	Pro Rata Budget	Actual To Date Amount	Variance Favorable (Unfavorable)
Operating Receipts					
3110.1	Management Fees	126,713.00	31,678.00	31,709.55	31.55
3610	Interest On Investments	-	-	-	-
3690	Other Operating Receipts	10,000.00	2,500.00	4,750.98	2,250.98
Total Operating Receipts		<u>136,713.00</u>	<u>34,178.00</u>	<u>36,460.53</u>	<u>2,282.53</u>
Operating Expenditures					
4110	Administration Salaries	81,000.00	20,250.00	20,250.00	-
4120	Compensated Absences	-	-	-	-
4130	Legal	2,000.00	500.00	-	500.00
4150	Travel and Related Expenses	-	-	-	-
4170	Accounting Services	5,232.00	1,308.00	-	1,308.00
4171	Audit Services	-	-	-	-
4190	Administrative Other	4,000.00	1,000.00	3,380.56	(2,380.56)
4510	Insurance	2,661.00	665.00	519.00	146.00
4540	Employee Benefits	32,394.00	8,099.00	9,136.15	(1,037.15)
Total Administrative Expenses		<u>127,287.00</u>	<u>31,822.00</u>	<u>33,285.71</u>	<u>(1,463.71)</u>
Net Income (Deficit) before Non Cash Expenses		9,426.00	2,356.00	3,174.82	818.82
4541	Post Employment Benefits - OPEB	-	-	-	-
4542	Pension Expense - GASB 68	-	-	-	-
4801	Depreciation Expense	-	-	-	-
Net Income (Deficit) after Non Cash Expenses		<u>9,426.00</u>	<u>2,356.00</u>	<u>3,174.82</u>	<u>818.82</u>

See Accountants' Compilation Report

DEPARTMENT OF HOUSING & COMMUNITY DEVELOPMENT
BALANCE SHEET

Salem Housing Authority
12/31/2024 Period Ended
MRVP/DMH Program Number

ACCOUNT NUMBER	ASSETS		X Administration Modernization 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	178,280.16	
1112.1	Cash Administration Fund - Restricted	0.00	
1113	Cash - Escrow	0.00	
1114	Security Deposit and Pet Deposit Fund Cash	0.00	
1117	Petty Cash	0.00	
1118	Change Fund	0.00	178,280.16
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	59,294.72	
1131	Allowance for Doubtful Accounts - Other	0.00	
1145	Accrued Interest Receivable	0.00	59,294.72
INVESTMENTS			
1162	Investments - Unrestricted		0.00
DEFERRED CHARGES			
1211	Prepaid Expenses	18.00	
1212	Inventory/Net - Supplies and Fuel	0.00	
1290	Deferred Charges - Other	6,689.00	6,707.00
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			244,281.88
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 & Pet Deposits	0.00	
2115	Bid Deposits	0.00	
2117	Employee's Payroll Deductions	0.00	
2118	Accounts Payable - Subsidy Overpayment	6,293.00	
2119	Accounts Payable - Interfund	0.00	
2120	Accounts Payable - Other	0.00	6,293.00
ACCRUED LIABILITIES			
2130.2	Accrued Contingent Liability	0.00	
2135	Accrued Compensated Absences - Current Portion	587.68	
2137	Payment in Lieu of Taxes (PILOT)	0.00	
2138	Accrued Payroll	160.87	
2139	Accrued Liabilities - Other	407.27	1,155.82
DEFERRED CREDITS			
2240	Tenants Prepaid Rents	0.00	
2290	Undistributed Credits	0.00	
2291	Deferred Revenue - Subsidy	70,324.00	
2292	Deferred Revenue - Other	7,021.00	77,345.00
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	655.34	
2339	Other Non-Current Liabilities	22,449.00	23,104.34
EQUITY (NET ASSETS)			
2700	Net Income (Deficit)	3,023.04	
2802	Invested in Capital Assets, net of Related Debt	0.00	
2805	Net Assets - Restricted	0.00	
2806	Net Assets - Unrestricted	Max % 38.56% 157,071.68	
2806.1/2	Net Assets - Unrestricted for OPEB & Pension Liability	(23,711.00)	136,383.72
TOTAL LIABILITIES AND EQUITY			244,281.88

See Accountants' Compilation Report

Salem Housing Authority MRVP/DMH
3 months ending
December 31, 2024

16 units
133 unit months

Fenton, Ewald & Associates, P.C.
PSP 01/21/25

Account Number	Classification	Approved Budget Amount	Pro Rata Budget 3 Months	Budget P.U.M.	Actual To Date P.U.M.	Actual To Date Amount	Amount Favorable (Unfavorable)	Actual As a Factor of Pro Rata	Available Remainder of the Year
OPERATING RECEIPTS									
3400	Administrative Fees - MRVP	16,200	4,050	30.45	55.00	7,315.00	3,265	1.806	8,885
3610	Interest on Investments - Unrestricted	750	188	1.41	1.13	149.97	(38)	0.800	600
3611	Interest on Investments - Restricted	-	-	-	-	-	0		0
3690	Other Revenue	-	-	-	-	-	0		0
3691	Other Revenue Retained	-	-	-	-	-	0		0
3802	Operating Subsidy - MRVP Landlords	813,860	203,465	1,529.81	1,529.81	203,465.00	0	1.000	610,395
TOTAL OPERATING RECEIPTS		<u>830,810</u>	<u>207,703</u>	<u>1,561.67</u>	<u>1,585.94</u>	<u>210,929.97</u>	<u>3,227</u>	<u>1.016</u>	<u>619,880</u>
OPERATING EXPENDITURES									
ADMINISTRATIVE									
4110	Administration Salaries	8,398	2,100	15.79	17.12	2,276.33	(177)	1.084	6,122
4120	Compensated Absences	-	-	-	-	-	0		0
4130	Legal	500	125	0.94	0.19	25.83	99	0.207	474
4140	Compensation-Board Members	-	-	-	-	-	0		0
4150	Travel And Related Expenses	-	-	-	-	-	0		0
4170	Accounting Services	1,656	414	3.11	2.09	278.00	136	0.671	1,378
4171	Audit Services	284	71	0.53	0.59	78.00	(7)	1.099	206
4180	Penalties & Interest	-	-	-	-	-	0		0
4190	Administrative Other	2,000	500	3.76	6.27	833.57	(334)	1.667	1,166
4190.1	Mixed Population Salary	-	-	-	-	-	0		0
4191	Resident Services	-	-	-	-	-	0		0
TOTAL ADMINISTRATIVE EXPENSE		<u>12,838</u>	<u>3,210</u>	<u>24.13</u>	<u>26.25</u>	<u>3,491.73</u>	<u>(282)</u>	<u>1.088</u>	<u>9,346</u>
GENERAL EXPENSE									
4510	Insurance	280	70	0.53	0.41	54.00	16	0.771	226
4540	Employee Benefit Contr.	3,415	854	6.42	6.74	896.20	(42)	1.050	2,519
4570	Collection Losses	-	-	-	-	-	0		0
4580/90	Interest & Other General Expenses	-	-	-	-	-	0		0
TOTAL GENERAL EXPENSES		<u>3,695</u>	<u>924</u>	<u>6.95</u>	<u>7.14</u>	<u>950.20</u>	<u>(26)</u>	<u>1.029</u>	<u>2,745</u>
TOTAL OPERATING EXPENSES		<u>16,533</u>	<u>4,133</u>	<u>31.08</u>	<u>33.40</u>	<u>4,441.93</u>	<u>(309)</u>	<u>1.075</u>	<u>12,091</u>
NET INCOME (DEFICIT) BEFORE SUBSIDY and NON-ROUTINE EXPENSES		<u>417</u>	<u>104</u>	<u>0.78</u>	<u>22.73</u>	<u>3,023.04</u>	<u>2,919</u>	<u>28.998</u>	<u>(2,606)</u>
NET INCOME (DEFICIT) before NON-ROUTINE, and INCLUDING SUBSIDY									
		<u>814,277</u>	<u>203,569</u>	<u>1,530.60</u>	<u>1,552.54</u>	<u>206,488.04</u>	<u>2,919</u>	<u>1.014</u>	<u>607,789</u>
NONROUTINE EXPENSES AND (CREDITS)									
4610	Extraordinary Maintenance	-	-	-	-	-	0		0
4611	Equip. Purchased - Non Capitalized	-	-	-	-	-	0		0
4612	Restricted Reserve Expenditures	-	-	-	-	-	0		0
4715	Housing Assistance Payments	813,860	203,465	1,529.81	1,529.81	203,465.00	0	1.000	610,395
TOTAL NONROUTINE EXPENSES		<u>813,860</u>	<u>203,465</u>	<u>1,529.81</u>	<u>1,529.81</u>	<u>203,465.00</u>	<u>0</u>	<u>1.000</u>	<u>610,395</u>
NET INCOME (DEFICIT) FROM OPERATIONS									
2700		<u>417</u>	<u>104</u>	<u>0.78</u>	<u>22.73</u>	<u>3,023.04</u>	<u>2,919</u>	<u>28.998</u>	<u>(2,606)</u>
4801	Depreciation Expense	-	-	-	-	-			
4541	Employee Benefits - GASB 45	-	-	-	-	-			
4542	Pension Expense - GASB 68	-	-	-	-	-			
NET CHANGE IN UNRESTRICTED NET ASSETS		<u>417</u>	<u>104</u>	<u>0.78</u>	<u>22.73</u>	<u>3,023.04</u>	<u>2,919</u>	<u>28.998</u>	<u>(2,606)</u>

See Accountants' Compilation Report

Thank you for your interest in our work. Here's the follow up information you were seeking. This is the question you sent in your last email:

Would you be willing to share a bit about your work in the affordable housing sphere, or more specifically, your comfortability and connection with the work that public housing authorities are doing?

Madeline and Rebecca have worked with many organizations like the Salem Housing Authority. Some work we did together and some independent of each other. We have provided executive coaching to leaders of housing authorities, worked with senior teams doing team building, strategic planning, culture change initiatives, executive transitions, succession planning, racial equity culture support to name a few of the types of work we've done with organizations. Here is a list of organizations:

- Natick Housing Authority
- Franklin County Regional Housing and Redevelopment Authority
- Just-A-Start Corporation
- South Boston En Accion (community based organization housed inside Boston Housing Authority)
- Association of Community Development Corporations
- Boston Chinese Neighborhood Center
- Codman Square Neighborhood Association
- Dudley Street Neighborhood Initiative
- Fenway Community Development Corporation
- Madison Park Development Corporation
- Urban Edge
- Preservation of Affordable Housing, national organization that supports all types of housing
- Wellspring House, Gloucester

and many organizations adjacent to residents of housing authorities.

Public Housing Authorities are more and more interested in reimagining how people live and this project is of interest for this reason. We as a society need to do this more and more out of

the box thinking about housing given the cost of single family home ownership especially in Greater Boston. There are 136 Public Housing Authorities in MA and we are excited to help you all envision a future for the Salem Housing Authority. These articles inspire us:

1. [This is What the Future of Public Housing Looks Like in Massachusetts | Mass.gov](#) May 2024
2. [Mass. Public housing redevelopment combines luxury with affordability - masslive.com](#) Nov 2024
3. [Healey-Driscoll Administration Awards \\$31.4 Million to Three Innovative Public Housing Projects | Mass.gov](#)
- 4.

A benefit of working with us is you get a multicultural, bi-racial team who care deeply about collaborative processes where the people most affected by decisions are centered in the process. We understand power dynamics can be complicated between housing authority boards, staff and residents and the greater community. Quasi government funded initiatives have complicated dynamics. As facilitators, consultants, coaches and instructors, we bring an astute ability to employ different skills on projects that are multi-faceted with a wide variety of stakeholders. We are educators ourselves in higher education and love researching and supporting groups to expand their sense of what's possible by sharing models and ideas from other parts of the world or nationally.

Let us know what else you need to make an informed decision.

Warm regards,

Madeline

**Salem Housing Authority
RFP response
for
Strategic Planning
Board Code of Conduct
RElationship Building & Mediation**

November 2024

Proposal submitted by:

Conditioning Leaders: www.conditioningleaders.com • 617-320-7381

Madeline McNeely, madeline@conditioningleaders.com

Rebecca Jackson, loveseedpractice@gmail.com

Lucy Ponciano, lucy@conditioningleaders.com

**CONDITIONING
LEADERS**

Conditioning Leaders is a network of senior level consultants, coaches, trainers, facilitators, and adjunct faculty. We work locally and nationally across the non profit, corporate and government sectors. In the non profit

sector we work in the areas of housing, community development, youth organizing and philanthropy to name a few of the fields we support. We understand the unique challenges maintaining healthy organizational cultures from decades of work supporting leaders and organizations of all sizes.

**Conditioning Leaders Core Values
Dignity, Love, Equity, Transparency**

**"What Got you Here
Won't Get You There."**
Marshall Goldsmith

**"Cultural change is proportional
to the level of trust."**
Judith Glaser

**"Change happens at
the speed of trust."**
Stephen Covey

**"What gets measured
gets managed."**
Peter Drucker

**"Good facilitation can
save the World."**
Rebecca Jackson

**"You can't project manage or train
your way out of racism."**
Madeline McNeely

**"We do not rise to our expectations
we fall to our level of training."**
Bruce Lee

This project is for

- Developing a board code of conduct
- Strategic planning/goal setting
- Relationship building/mediation

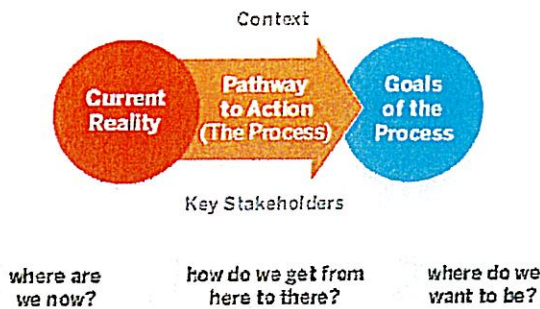
Madeline McNeely and Rebecca Jackson will be the lead facilitators and consultants along with Lucy Ponciano, Conditioning Leaders Administrative and Project Coordinator.

Conditioning Leaders consultants are grounded in healing and trauma-informed approaches, restorative and community engagement principles and practices. The four roles we use (coach, consultant, trainer, and facilitator) support leaders in strategic planning and trust building processes and we embed BEID (Justice, Belonging, Equity, Inclusion, Diversity) principles and practices throughout all our work whether it's mediation or board and leadership development.

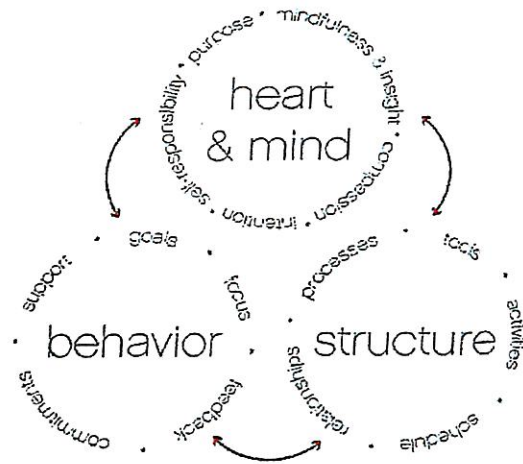
Strategic planning, developing a board code of conduct and relationship building/mediation for organizations who are engaged in such transformational, multifaceted work requires trust, vulnerability, and bravery. We are masterful, intentional process

experts who understand our responsibility as facilitators to build a container that can hold up to the challenges of many perspectives, identities, etc., on the issues you tackle - housing insecurity issues, economic stability and all the support systems that this work involves. We understand that process drives content and outcomes. We approach the work in a people-centered way: effective strategy can't only be mandated from above--it has to be nurtured and adopted at all levels, hence our participatory multi-stakeholder approach.

Another document to give you more information about our work includes Why Conditioning Leaders. We're guided by process and content frameworks for planning, implementation and evaluation. Here are two frameworks to give you a sense of our approach:



Process Design Pathway, www.interactionassociates.com



Wheel of Change www.stproject.org

Project 1: Strategic Planning

A strategic plan is a pivotal moment in the life of an organization. It provides an opportunity for all stakeholders to coalesce around a plan for the future, and can be a catalyst for new, creative thinking, opening up new possibilities and pathways. In order to maximize this opportunity for our clients, we ground our strategic planning process in a few central principles and elements.

1. **Strategic Planning and Equity/Justice Outcomes are inextricably linked.** We hyperlink [this article](#) outlining the value and challenges that arise when equity is *not* integrated into strategic planning processes. We recommend all organizational stakeholders read this article as they embark on this strategic planning journey. Strategic planning processes are often top down and do not center the voice, perspective and experience of the staff or the people who receive their services. This is a huge mistake and is antithetical to the principles of equity and inclusion that you seek to incorporate and centralize.

Other processes we have used with previous clients

2. **Strategic Planning Committee (SPC).** We recommend the creation of a strategic planning committee. This group (ideally 4-10 people depending on project) should include staff from across the hierarchy, clients (if applicable), volunteers and board members. This group would be the decision-makers for the various steps of the plan development, with input from the rest of the stakeholders. Often the best people to craft this content are staff at the department level and resident leaders who will carry out the work. We will determine these kinds of decisions and level of involvement during the planning and design phase.

We often propose a retreat to kick off the work to build relationships, establish trust and get agreement on all the elements of the planning process. This retreat is an opportunity to identify the various perspectives, commitments, and values of the members of the committee so as we move forward to make decisions, there is a shared understanding of what members are coming to the table with individually and collectively.

3. **Listening Sessions & Survey.** Once a committee is established, listening sessions with staff across roles and programs, as well as residents etc. will allow us to engage a broad range of voices. We also suggest a survey to ensure a breadth and depth of perspectives. This is decided in our planning and design phase. The committee

would help to create the questions and the facilitators will summarize the feedback and share it back with the committee as a part of what informs strategic priority areas, goals, strategies etc. In attempting to solicit feedback from different groups of people it's important to be creative about utilizing multiple formats - written, spoken, videos, and other embodied ways to engage people in the conversation.

4. Communication. Our goal is to establish a cadence of communication throughout the process, based on the existing schedule of staff meetings, board meetings, and perhaps town hall sessions with clients as well. It is absolutely essential to maintain transparency and clear communication throughout the process. This might mean providing summaries to the staff and other stakeholders between larger meetings, providing updates, making various materials available as appropriate so that people are able to access agendas, etc., even if they aren't participating in the meetings directly. This level of transparency ensures buy-in and engagement which helps with the long-term success of the strategic plan.

Project 2: Board Code of Conduct

This work takes anywhere from 2-5 sessions depending on the size of the board, the depth of trust between members, desired outcomes and depth of co-creation and consensus building requested by the board. We have facilitated board development for dozens of organizations during our combined 45 years working with non profit organizations and have a lot of ideas and tools in our facilitation toolkit to support a board's creation of their Code of Conduct. During the planning and design phase, we propose what you need based on learning where the board is at in their development as a group. We customize our board development work as all groups are different.

Project 3: Relationship Building/Mediation

As practitioners of restorative justice and restorative circles, relationship building and mediation is at the heart of our work. During the planning and design phase, we can propose what you need based on learning what the root problems are that need tending to. We customize our interventions once we have agreement on the root problems needing attention. We care about building your capacity integrating restorative principles into leadership decision for example. We support clients in different capacities sometimes in a format of "coaching the coach" or "training the trainer."

We also will offer suggestions on sequencing of the work streams during the planning and design phase.

Our Facilitation Approach

Below are a few key principles foundational to an equitable and effective process:

Facilitation is always the key to ensuring an inclusive process that fulfills the group's desired outcomes. The facilitators' job is to make things as easy as possible for participants. In the case of a strategic planning process, this includes the work between meetings to ensure that information flows from one conversation and group to the next. We determine with the SPC and various stakeholder groups what the ideal format is for sharing information and working together. Clients repeatedly tell us our facilitation is second to none both in person and in virtual settings. We are process experts and this distinguishes our consultancy.

Voice - Centralizing the voices of people who do the work, and are on the receiving end of the work is a key part of equitable strategic planning processes. We follow the principles of universal design, which means that we plan our sessions for the 'margins' so that the voices that are systemically most marginalized are centralized, but it also means creating processes that allow various language, learning styles, etc. to be fully included. For example, using closed captions when in virtual meetings for those that need or prefer it, translating documents, having visuals along with written documents.

Trust & Relationships - we centralize trust and relationship building in all of our processes. This involves us as facilitators providing the opportunity for participants to build trust with us, and to build relationships among the group itself. During a strategic planning process, there are many challenging issues that inevitably arise - issues related to money, inequity, vision, values, etc., and it's essential that there is a foundation of trust and a container that allows people to communicate openly. We use Touchstones which are dialogue guidelines to support honest, brave conversations and to go from divergent to convergent thinking during decision-making processes. Building this type of trust across multiple differences (in an intersectional space) is a facilitative challenge. Combined, Rebecca and Madeline have over 50 years of experience in creating spaces where challenging conversations can happen effectively and with minimal to no harm.

Consultant Bios

Madeline McNeely, M Ed

Madeline's mission is to condition leaders and organizations to do meaningful work for decades. Her company, Conditioning Leaders, is a network of BEID (Belonging, Equity Inclusion and Diversity) practitioners who support leaders and organizations through transformative culture change. With over 30 years' experience as a coach, facilitator, consultant and educator, Madeline is a seasoned leadership professional in non-profit, business and government settings. Madeline has co-designed *White Women and the Power Paradox*, a body of work designed for white women committed to creating cultures of racial equity, belonging and equity. She loves coaching because she knows the "soft stuff is the hard stuff."

Her work is rooted in trauma and restorative approaches making embodied leadership more possible for all. Madeline's sweet spot is supporting clients to think in innovative ways and develop new habits to solve their most vexing people, organizational and network challenges. Madeline has lived and worked in both Kenya and Senegal and thinks about leadership from a global perspective. She has coached hundreds of leaders, teams and community of practice cohort members ranging from youth workers, nonprofit professionals, doctors to C-suite corporate executives. Nonprofit clients include City Year, Community Foundation of Western MA, Jumpstart, Mass General Brigham, Newton Public Schools and dozens more. Corporate clients include Wellington Management, CarGurus and Panasonic to name a few.

At Harvard Extension School, Madeline teaches *Non-Profit leadership and Community Engagement, Leadership Coaching Strategies* and *Executive Leadership Coaching: Mastery Session*. She has been a Coach, Facilitator and Coach Recruiter for Harvard Business School. She is published in *Forbes.com* and co-authored *Millennials in Wonderland* about coaching millennials. Madeline is a certified coach and trainer in *Conversational Intelligence* (C-IQ), *Leadership Embodiment* and is also a certified Integral yoga teacher. Madeline's BA from Lewis & Clark College is in International Development, and she has an M Ed from Temple

University. Madeline grew up in Boston and currently resides in Newton, MA with her daughter. Madeline is most proud of raising a racial conscious white child who understands power, privilege and white supremacy. Her vegetable and perennial gardens are a salve in these turbulent times.

Rebecca N. Jackson, MSW

Rebecca is a clinically trained facilitator, teacher, consultant and coach. She began her career as the pastor of a small independent church in Mattapan, from 1999-2005. She then took her love for teaching, leading and supporting communities of color to Simmons College Graduate School of Social Work. At Simmons she began her work facilitating dialogue around issues of race and identity and how it shows up in clinical work. Rebecca completed her MSW in 2009, and since then has spent her career working with young people and families who have experienced trauma. She joined Trinity Boston Connects in November 2012 where she was trained in restorative justice and began to lead Trinity's pursuit of racial equity, restorative justice and trauma inclusion in its internal functioning.

Rebecca founded Trinity's Organizational Equity Practice (OEP) in 2017, through which she led a team in providing specialized equity consulting services to local and national organizations. She then went on to serve as Chief Program Officer at Trinity, where she helped to lead a strategic planning process for the organization's five programs and helped to develop human resources processes based in equity and restorative justice.

Through LoveSeed, Rebecca continues to support various organizations throughout Boston, as they strive to live out equity in their internal practices. Rebecca has a passion for creating spaces where people can learn, grow and have difficult conversations. She also teaches at schools of social work and education in and around Boston.

Lucia Ponciano

Lucía (Lucy) Ponciano brings a wealth of experience and passion for fostering positive change to her role as Administrative and Project Coordinator. With fluency in multiple languages, Lucy embodies a commitment to global communication and understanding, enhancing her ability to connect with diverse communities and stakeholders. Previously, Lucy dedicated 10 years to empowering young minds as a teacher in Guatemala. In the classroom, she fostered a learning environment that celebrated diversity, encouraged critical thinking, and inspired students to reach their full potential. This dedication to fostering growth and inclusion naturally translates to her current role, where she provides administrative support and project coordination for Conditioning Leaders' mission to fight for equity and inclusion. Lucy is enthusiastic about leveraging her organizational skills and collaborative spirit to contribute to positive social change.

Budget

Strategic plans range in price. Generally the range is between \$15,000-\$100,000. We don't have enough information to give you an exact quote. We are flexible and stretch or shrink the outcomes and process based on budget, desired process and outcomes you strive to accomplish. We don't want price to be a barrier. Below we have added a sample timeline and activities to give you a sense of how the process could be designed, but this is just food for thought and not a prescription. We outline a process in our planning and design phase of the work in collaboration with you and what you need and want.

Board Code of Conduct and **Relationship Building/Mediation** costs are priced based on project outcomes, length of time and other factors yet to be determined.

We prefer to price by project and not use an hourly rate, but as a starting point, our consultant hourly rate is \$300/per hour per consultant. Similarly for these initiatives, we don't want finances to be a barrier to partnership. We are happy to negotiate and design accordingly if you have a budget allocated already we can work within your constraints. It is possible for one consultant to do some of the work which will lower your overall costs. All of this can be discussed.

The budget can be created as a part of the planning and design phase. What's most important is that you are excited to work with us and that you feel confident we will deliver a final product and process that has you feeling thought well about and cared for during this significant phase of your organization's evolution.

We appreciate that you are looking for one team of consultants to support these three streams of work. We are a multiracial, multicultural team and bring a range of skills and consciousness to these projects. Lucy's native language is Spanish, Rebecca is a trained mediator, Madeline is trained in a variety of models to deepen trust and rapport in groups where power differentials are at play. We have decades of experience supporting leaders and organization.

SAMPLE Strategic Planning Phases & Activities

Phase I: Planning and Design (TIME)

Activity	Purpose & Description of Activity
Initial Planning Meeting	Initial meeting with selection committee or few potential members of the Strategic Planning Committee (SPC yet to be determined). Purpose is to review proposed process, agree on flow of work, begin scheduling, SPC Selection Criteria, and other clarifying questions about strategic planning journey.
Consultant Onboarding	Consultants will review previous strategic plan, relevant board and staff meeting agendas, organizational chart, other relevant information as deemed by leadership team.
Landscape Analysis	This phase of the process may be ongoing as consultants gather information about similar organizations and share with Jumpstart. This may continue into the Implementation Phase.
Kick off Meeting	This will be an opportunity to review the high level strategic planning process <i>with the entire staff</i> , build relationships and trust between staff and consultants

Phase II: Implementation (TIME)

Activity	Purpose & Description of Activity
Kick Off Retreat	This retreat will serve as an opportunity for the members of the committee to deepen trust and relationships, establish a common vision of the strategic planning process, review strategic priority areas and questions as well as develop other key strategic questions that will guide the process.
Listening Sessions	The SPC helps to develop the questions that will be asked in these listening sessions. We will hold 4-6 groups depending upon recommendations from SPC. Consultants develop a report based upon the listening sessions, which will be presented to the SPC and perhaps to other stakeholders as well. *This line item is subject to scheduling constraints, interests, client expertise and budget. Rebecca and Madeline can split the Listening Sessions between us.
Survey	If appropriate consultants prepare a survey to obtain feedback from people who may not be able to participate in listening sessions. *This line item is subject constraints, interests, client expertise and budget. Will be discussed at Initial Planning Mtg
Report Summary	Purpose is to summarize findings from the Listening Sessions and Survey so that stakeholders can use this data to inform Strategic Planning content.
Stakeholder Report Out Meeting	One meeting to share report findings from Listening Sessions and Survey to stakeholders as it will inform design of goals, strategies etc.
Strategic Planning Meetings	These meetings will serve as the vehicle for moving the process forward to completion. Consultants consolidate material from previous meetings and present to the committee with decisions to be made, next steps to be determined, etc. Frequency of the meetings will be based upon availability of the committee and necessity. Committee members may be asked to do some pre-work between

	meetings as well - reviewing material, etc.
Report Writing	Consultants will write one draft, share with client, get and incorporate feedback, then submit and present final report to client.
Strategic Planning Presentation	Strategic Planning Committee, with consultant support, present the completed Strategic Plan to the organization and other relevant stakeholders. Likely will need 2 meetings to accomplish this.

Phase III: Evaluation (TIME)

Activity	Purpose & Description of Activity
Project Completion & Eval Meeting	Wrap Up meeting with SPC to evaluate process. Scheduled within 1 month after All Staff Presentation of Plan is complete.
Implementation Meetings	3 month and 1 year check-in meetings with Strategic Planning Committee (TBD). Purpose is to ensure all staff are all deepening their connection to the Strategic Plan in its first year ensuring this process stays alive during its 5 year period.

Administrative Support (TIME)

Activity	Purpose & Description of Activity
Administrative Support	Our Administrative and Project Coordinator supports all scheduling, virtual meetings, transcribing notes from meetings, graphic and document editing, billing and contracting, final report preparation.



V A R G A S
P R E M I E R
C O R P O R A T E
C O N S U L T A N T S

David A. Vargas, MSA, CPA
Chief Executive Officer
david.vargas@vpccinc.com

Milan Ozdinec
President
milan.ozdinec@vpccinc.com

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

Dear Ms. Hoog:

Vargas Premier Corporate Consultants, Inc. (VPCC) is pleased to provide our professional capability and proposal to assist the Salem Housing Authority with strategic planning and goal setting including in-depth interactions with Board members. Our firm's extensive experience in the affordable housing sector is well suited to meet your agency's needs. As a Hispanic, woman-owned business, VPCC leverages the diverse expertise of its leadership team, which includes seasoned professionals who have held critical roles within HUD and other key public and private sector positions.

PROFESSIONAL CAPACITY TO COMPLETE THE WORK

With over 60 years of experience as senior executives at HUD, Mr. Milan Ozdinec and Mr. David Vargas developed and implemented the strategic vision for the Housing Choice Voucher and Public Housing programs, the nation's largest assisted housing programs. Mr. Ozdinec, in his role as Deputy Assistant Secretary for Public Housing Investments, implemented the HOPE VI Program at HUD, which revitalized some of the nation's most distressed public housing. The documentation that was produced from the program's implementation has become the foundation for future redevelopment efforts like the Rental Assistance Demonstration (RAD) and Choice Neighborhoods.

Mr. Vargas, in his role as Deputy Assistant Secretary for the Real Estate Assessment Center, used his background as a certified CPA to bring PHA accounting into compliance with generally accepted accounting principles thus ensuring greater accuracy and transparency in public housing financial management. His leadership in deploying the Enterprise Income Verification System played a pivotal role in reducing improper payments across HUD's portfolio by over 50% in less than three years, significantly enhancing program integrity and financial accountability. He also spent over six years leading the operations of both the HCV and PH programs at HUD as the Associate Deputy Assistant Secretary for the

Office of Public Housing and Voucher programs and five years leading human capital information technology for the federal government.

PLAN FOR COMPLETING THE WORK

VPCC's approach to this project will emphasize interaction with Salem senior leadership and Board members to help the agency develop a strategic plan and roadmap to improve agency performance using a people, process and technology approach. We will also analyze the existing inventory of PHA programs and make recommendations in terms of real estate and program structuring that meets the needs of its residents.

The interaction with Board members will include the development and assistance in the adoption of an effective Code of Conduct for Board members that leads to successful interactions between PHA staff and its Board

The approach envisions two visits to Salem by both Mr. Vargas and Mr. Ozdinec. The initial week-long visit will focus on data gathering to develop the vision and agency approach for its long-term strategic plan and interaction with Board members. This will be followed by a shorter second visit to finalize the strategic plan and to present the Code of Conduct to the Board of Directors for consideration. In between visits, the team will develop the strategic plan, goals and proposed metrics to measure success.

ESTIMATED COST TO COMPLETE THE WORK

The estimated cost, including travel, is expected to not exceed \$45,000 based on 80 hours of total time for each Mr. Vargas and Mr. Ozdinec as well as travel costs based on the applicable federal per diem for Salem.

VPCC is uniquely positioned to bring its expertise, resources, and commitment to this critical project. We are confident that our involvement will significantly enhance this initiative's success.

Sincerely,

Claudia Vargas Arakelian

Claudia Vargas Arakelian
Chief Operating Officer
Vargas Premier Corporate Consultants, Inc. (VPCC)



Proposal for Salem Housing Authority Board Governance Development Services

Prepared for: Salem Housing Authority

Prepared by: CEW Advisors

Date: October 25, 2024

Service Fee: \$12,500 (Estimated)

Objective:

To provide board governance development services to Salem Housing Authority board, focusing on creating foundational documents and structures that support effective and supportive board and staff interactions and operations.

Scope of Work:

- 1) Three Planning Sessions:
 - a. Facilitate three 90-minute planning sessions to discuss challenges and establish goals that align with the organization's mission.
 - b. Session topics to be discussed but could include discussions on role clarification, meeting structure, communication and de-escalation, and fostering a positive organizational culture.
- 2) Establishment of a Code of Conduct:
 - a. Create a Code of Conduct that reflects the organization's core values and establishes clear expectations for ethical and supportive behavior by board members and staff.
 - b. Provide guidelines on conflicts of interest, de-escalation, expectation of behavior, confidentiality, and accountability.

Deliverables:

- Finalized Code of Conduct for Salem Housing Authority.

Timeline & Fees:

The project is estimated to require approximately 100 hours at a rate of \$125 per hour, bringing the total estimated fee to \$12,500. The planning sessions will be scheduled at a mutually agreeable time for board members. Final deliverable will be completed within two months after planning sessions are completed.

Next Steps:

Upon approval of this proposal, a formal agreement will be drafted to outline the terms and commence the project.

Sincerely,

A handwritten signature in black ink, appearing to read 'B. Hull'.

Brian Hull, President
CEW Advisors, Inc.

CEW Advisors, Inc.

Phone: 401-580-3321 | **Email:** info@cewadvisors.com | **Website:** www.cewadvisors.com



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Code of Interpersonal Conduct for the Board of Commissioners of the Salem Housing Authority

Statement of Purpose

This Code of Interpersonal Conduct is intended to encourage constructive and effective interactions by board members, both among themselves and with others. This Code of Conduct does not override other codes and policies that cover board members, such as the state code of conduct for public officials and employees.

General

Board members should treat other people with courtesy and respect. This includes tenants, staff, members of the public, and each other. Questions, disagreements, and complaints can all be communicated courteously and respectfully. Board members should be aware that their words and behavior can affect others' feelings and can affect the SHA's reputation.

The perception of courtesy and respect is subjective. A board member should balance a "reasonable person" standard with an individual's expressed feelings. That is, a board member should consider whether a behavior would be considered courteous and respectful by a reasonable person given generally understood social norms, but a board member should also consider whether an individual person has stated that they find a specific behavior discourteous or disrespectful and has asked for the behavior to stop.

Conducting Oversight

According to the training manual for local housing authority board members, the board is responsible for, among other things, setting and revising SHA policy; ensuring that the SHA is operating in compliance with federal, state and local laws, regulations, rules and guidelines; ensuring that fiscally sound practices are implemented in accordance with state guidelines, the EOHLC¹ accounting manual, and other applicable laws and regulations; and overseeing all aspects of the employment of the executive director.

Conduct with Respect to Tenants

According to the training manual, board members should encourage and support tenant participation in the administration of the SHA. The board will treat the state regulations regarding tenant participation as a minimum starting point.

Conduct with Respect to the Executive Director

¹ EOHLC - Massachusetts Executive Office of Housing and Livable Communities

As stated above, the board oversees the executive director. Among other things, the executive director is in charge of implementing SHA policies; acting in compliance with laws, regulations, rules, and guidelines; and overseeing the SHA staff.

Conduct with Respect to SHA Staff Other than the Executive Director

Board members should not assign tasks directly to SHA staff. Tasks are assigned to SHA staff by the executive director.

Board Meetings

The chairperson and/or vice chairperson, with the advice of the executive director, set(s) the agenda for each board meeting.

Board members are expected to attend all or most board meetings. Occasional excused absences are acceptable.

Board members should come to meetings having read the materials necessary to participate fully.

The board uses Robert's Rules of Order, simplified or modified as agreed upon by the board. The formality of Robert's Rules promotes courteous deliberations and helps the board to conduct effective meetings.

Board meetings are presided over by the chairperson. In accordance with Massachusetts Open Meeting Law, no one may speak at a board meeting without permission of the chair, and all persons must, at the request of the chair, be silent.

The chairperson will decide whether public comment will be taken at a board meeting and, if so, for how long. The chairperson will conduct any public comment in accordance with Open Meeting Law and the US and Massachusetts constitutions. The chairperson will encourage, but cannot require, that individuals participating in public comment show courtesy and respect to others.

Fiduciary Duty

Board members have a fiduciary duty to the SHA. This is a duty to act in the best interest of the organization, with good faith, loyalty, and due care. According to training from the Massachusetts Office of Inspector General, among other things, fiduciaries such as SHA board members should:

- Exercise care when making decisions by asking questions and obtaining information
- Actively oversee the executive who leads the organization
- Actively monitor and protect public expenditures

Accordingly, the following behaviors by board members should not be construed as hostility or as creating a hostile workplace²:

- Holding board meetings that last longer than one hour or holding more than one board meeting per month
- Voting against an agenda item whose passage was suggested by the executive director
- Tabling an agenda item for further research or for further discussion at the next board meeting
- Questioning an expenditure or asking if a less expensive alternative can be found
- Requesting that the executive director implement best practices for compliance rather than the minimum required by law
- Requesting that the executive director implement new procedures or technological changes to aid the efficient functioning of the board or to improve tenant or public experience of the SHA website, etc.

The following decisions belong solely to the board and the board members' exercise of their discretion should not be construed as hostility or as creating a hostile workplace²:

- Rating the executive director's performance
- Approving or not approving a pay raise for the executive director
- Entering into executive session in accordance with the Open Meeting Law
- Inviting or not inviting SHA staff into an executive session in accordance with Open Meeting Law

Complaints About Board Member Interpersonal Conduct

The board members encourage feedback on their interpersonal conduct, positive or negative. This feedback should be taken and considered through the lens of problem resolution and used to resolve perceived instances of violation of this code of interpersonal conduct. Problems are often easier to resolve when an informal atmosphere encourages people to identify the difficulty, talk it out, and agree on how to deal with it. However, individuals may submit formal complaints to the board regarding board members compliance with this code of interpersonal conduct.

Formal complaints should include: name of the member who violated this code and when, where, and how they violated this code. A complaint would also include suggestions for how to resolve the perceived violation. The board will review complaints and attempt to resolve them to the satisfaction of all parties.

² See the legal definition of a hostile workplace environment in Massachusetts law.

Please note that according to Massachusetts General Law Ch.121b, section 6, a local housing authority board member may be removed for “inefficiency, neglect of duty or misconduct.” That law does not define misconduct and this SHA Code of Interpersonal Conduct should not be taken to define misconduct under MGL Ch. 121b(6). If someone wants an SHA board member removed for inefficiency, neglect of duty, or misconduct under MGL Ch. 121b(6), **the proper procedure for filing a complaint against a housing authority commissioner in the City of Salem is to submit a written complaint to the appointing authority.** In the case of a board member appointed by the mayor and confirmed by the city council, the mayor or city council may hold a hearing on the complaint. In the case of a board member appointed by the governor/EOHLC, the mayor or city council forwards the complaint to the governor/EOHLC for their action.

Sources

Massachusetts Department of Housing and Community Development's Training Manual for Local Housing Authority Board Members 2014

<https://www.mass.gov/doc/lha-board-training-manual-2014/download>

Guide for Members of Public Boards and Commissions: How to be an Effective Member of a Public Board or Commission, Massachusetts Office of the Inspector General, June 2023

<https://www.mass.gov/doc/guide-for-members-of-public-boards-and-commissions/download>

Massachusetts Open Meeting Law

<https://www.mass.gov/the-open-meeting-law>

<https://malegislature.gov/Laws/GeneralLaws/PartI/TitleIII/Chapter30A/Section20>

Boston Housing Authority language regarding informal problem resolution

<https://www.bostonhousing.org/BHA/media/Documents/Departments/HR/5-Workplace-Harassment-Policy.pdf>

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The board uses Robert's Rules of Order, simplified or modified as agreed upon by the board. The formality of Robert's Rules promotes courteous deliberations and helps the board to conduct effective meetings.

Board meetings are presided over by the chairperson. In accordance with Massachusetts Open Meeting Law, no one may speak at a board meeting without permission of the chair, and all persons must, at the request of the chair, be silent.

The chairperson will decide whether public comment will be taken at a board meeting and, if so, for how long. The chairperson will conduct any public comment in accordance with Open Meeting Law and the US and Massachusetts constitutions. The chairperson will encourage, but cannot require, that individuals participating in public comment show courtesy and respect to others.

Fiduciary Duty

Board members have a fiduciary duty to the SHA. This is a duty to act in the best interest of the organization, with good faith, loyalty, and due care. According to training from the Massachusetts Office of Inspector General, among other things, fiduciaries such as SHA board members should:

- Exercise care when making decisions by asking questions and obtaining information
- Actively oversee the executive who leads the organization
- Actively monitor and protect public expenditures

Accordingly, the following behaviors by board members should not be construed as hostility or as creating a hostile workplace:

- Holding board meetings that last longer than one hour or holding more than one board meeting per month
- Voting against an agenda item whose passage was suggested by the executive director
- Tabling an agenda item for further research or for further discussion at the next board meeting
- Questioning an expenditure or asking if a less expensive alternative can be found
- Requesting that the executive director implement best practices for compliance rather than the minimum required by law
- Requesting that the executive director implement new procedures or technological changes to aid the efficient functioning of the board or to improve tenant or public experience of the SHA website, etc.

The following decisions belong solely to the board and the board members' exercise of their discretion should not be construed as hostility or as creating a hostile workplace:

- Rating the executive director's performance
- Approving or not approving a pay raise for the executive director
- Entering into executive session in accordance with the Open Meeting Law
- Inviting or not inviting SHA staff into an executive session in accordance with Open Meeting Law

Complaints About Board Member Interpersonal Conduct

The board members encourage feedback on their interpersonal conduct, positive or negative. In most instances, informal discussion and problem resolution is best to resolve perceived instances of violation of this code of interpersonal conduct. Problems are often easier to resolve when an informal atmosphere encourages people to identify the difficulty, talk it out, and agree on how to deal with it. However, individuals may submit formal complaints to the board regarding board members compliance with this code of interpersonal conduct.

Formal complaints should include who violated this code and when, where, and how they violated this code. Ideally, a complaint would also include suggestions for how to resolve the perceived violation. Complaints may be made in writing or verbally at a board meeting. The board will review complaints and attempt to resolve them to the satisfaction of all parties.

Please note that according to Massachusetts General Law Ch.121b, section 6, a local housing authority board member may be removed for "inefficiency, neglect of duty or misconduct." That law does not define misconduct and this SHA Code of Interpersonal Conduct should not be taken to define misconduct under MGL Ch. 121b(6). If someone wants an SHA board member removed for inefficiency, neglect of duty, or misconduct under MGL Ch. 121b(6), the proper procedure is to send a written complaint to the Salem mayor or city council. In the case of a

board member appointed by the mayor and confirmed by the city council, the mayor or city council may hold a hearing on the complaint. In the case of a board member appointed by the governor/EOHLC, the mayor or city council forwards the complaint to the governor/EOHLC for their action.

Sources

Massachusetts Department of Housing and Community Development's Training Manual for Local Housing Authority Board Members 2014

<https://www.mass.gov/doc/lha-board-training-manual-2014/download>

Guide for Members of Public Boards and Commissions: How to be an Effective Member of a Public Board or Commission, Massachusetts Office of the Inspector General, June 2023

<https://www.mass.gov/doc/guide-for-members-of-public-boards-and-commissions/download>

Massachusetts Open Meeting Law

<https://www.mass.gov/the-open-meeting-law>

<https://malegislature.gov/Laws/GeneralLaws/PartI/TitleIII/Chapter30A/Section20>

Boston Housing Authority language regarding informal problem resolution

<https://www.bostonhousing.org/BHA/media/Documents/Departments/HR/5-Workplace-Harassment-Policy.pdf>

*Abbreviations

EOHLC - Massachusetts Executive Office of Housing and Livable Communities

Board Member Code of Conduct

1. Respect and Inclusion

Board members should refrain from mentioning or making any comments about race, ethnicity, or any other characteristic protected by anti-discrimination laws, both during meetings and in any public statements, unless it directly pertains to issues of inclusivity or policy set forth by the organization. Our goal is to create a space where all individuals feel respected and valued, regardless of background.

2. Social Media Use

Board members should refrain from using personal or professional social media platforms to express opinions, concerns, or criticisms related to the Housing Authority's business unless such communication is pre-approved by the Board Chair. Any online posts that misrepresent the organization's goals or decisions can harm the community's trust and must be avoided.

3. Professionalism and Collaboration

All members are expected to engage with one another in a professional and respectful manner. Disagreements should be handled constructively and privately, without resorting to public forums or personal attacks.

4. Conflict Resolution

Should any board member have concerns about the conduct of another member, these concerns should be raised privately with the Board Chair or a designated mediator, and not discussed publicly or online.

Some things I would like to see incorporated in to a Code of Ethics/Conduct Policy for Board Members:

- Board Members are expected to exercise the duties and responsibilities of their positions with integrity, collegiality, objectivity, diligence and care.
- This includes:
 1. Being prepared to discuss the issues and business on the agenda, and having read all background material relevant to the topics at hand.
 2. Cooperating with and respecting the opinions of fellow Board members and leaving personal prejudices out of all board discussions, as well as supporting actions of the Board even when the Board Member personally did not support the action taken.
 3. Putting the interest of the organization above personal interests.
 4. Representing the organization in a positive and supportive manner at all times and in all places.
 5. Showing respect and courteous conduct in all board and committee meetings.
 6. Refraining from intruding on administrative issues that are the responsibility of management, except to monitor the results and ensure that procedures are consistent with board policy.
 7. Promote collaboration, cooperation, and partnership among board members.
 8. Board Members who interact with staff must do so in a respectful manner and understand employees should not be expected to take direction from any individual board member on any matter.
 9. Board members should distinguish between their personal beliefs and their professional duties.

We are respectful and authentic.

We are compassionate and work in the best interest of the community.

We grow public confidence in our organization.

We base our decision making on what increases our ability to positively impact resident's lives.

We focus on the well-being of our employees.

We are collaborative and create a shared vision.

The housing authority board members must uphold the reputation of the housing authority.
This includes maintaining the reputation of the housing authority in public.

Free any board members from the responsibility of excusing any vital member involved directly, and in a position to assist in the thorough outcome of a meeting.”

"With respect to past practices and ideas to bring balance, between Salem housing board and staff. I believe these to be a goal.

Follow guidelines, and order of agenda as written, posted and packeted.

Allow 5 days notice, in advance, of changes, revisions or amendments to the process and procedures, as related to housing business, public or within the housing board.

Set restrictions to duties for documenting, consolidating, and general recording of the minutes, after special or regular board meetings.

In the nature of moneys allocated, by citizens, have constructive discussion of past, present and future, property projects, as presented by executive director.

As is structured with time for public comment, allow ample, but limited time for board members to discuss question or challenge the material prepared and sent to board members in advance of scheduled meetings, be them special or regular.

Be consistent in time limits determined and calculated within the board, for public comment.

Be mindful of safe language used to protect the rights of all, without derogatory, racial or malice intent.

Any discussion of CBA needs to be scheduled at a time when the voice of all union members, at any level, can be present.

I hope these comments are the type of things which can help, not hurt anyone."

Ultimately they would like the board to be under the same code of conduct as the employees . The board should be under stricter policy as they are representing us in public meetings.
Here are some additional thoughts.

- 1.) not posting about the SHA or its employees negatively on social media.
- 2.) not speaking negatively to other city employees and departments about the SHA or its employees.
- 3.) refraining from interjecting into the day to day operations of the housing authority.
Including union matters.
- 4.) be more consistent and fair with time restrictions during public comment.
- 5.)no restrictions for the executive director in meetings, she should be allowed to speak. She is the voice of the housing authority.
Taking away her voice, takes the away the voice of every other employee.
- 6.) board members should come to the table more prepared. Ask questions if necessary before hand to keep meetings concise.

It's important for the Board to recognize that the personal beliefs, personal political affiliations and opinions on social/cultural/psychological theories and norms don't belong in a public housing authority Board of Commissioners meeting. The Board meetings are for conducting business of the authority and reviewing operations of the authority. Public Housing Authority Board meetings are not a stage to highlight personal politics, opinions, beliefs or to grandstand for personal reasons to gain or ensue public comment and public notoriety. It is unethical to use one's position as a Board member to gain public attention by highlighting personal beliefs for personal gain.

Board members should leave race, ethnicity, sex, religion, and any other personal identification a person can have out of the decision-making process for new/contract hires.

I think the employee Code of Ethics/Conduct is pretty good. Maybe it could be modified for the Board? I hi-lighted a few things from ours for consideration.



SALEM HOUSING AUTHORITY CODE OF ETHICS/CONDUCT

WHY MUST WE HAVE A CODE OF ETHICS

Government only works well if people trust those who work for the Government. They must believe that important decisions are based on honest analysis of the information at hand and not on self-interest. That means that we who work for government must be extremely careful to avoid making, or even looking as if we might be making, anything but fair and unbiased decisions.

In order to do our job properly, we must have the public's confidence. All our contact with the public therefore must be completely honest and ethical. That is why we need a Code of Ethics. Our Code of Ethics will help us to be consistent in our treatment of the public and our fellow employees as we do our jobs. It is a guide and will provide examples. It cannot cover every detail of every job. In situations not explicitly covered, the spirit of the code must be followed.

This is a guide for your own protection as well as the Salem Housing Authority. If anything is unclear to you, it is important that you ask your department head or the Executive Director for help in determining how the guidelines apply to your job. Remember, the State Ethics Commission will hold you responsible for violations of the Conflict of Interest Laws (only portions of which are summarized here) whether you understood them or not and whether your violation was intentional or not.

Attachment #3

The important policies you will find explained in this handbook are:

- (1) Your own interest must never take precedence over the public interest. It must not even appear that it could happen;
- (2) You may not do anything, or fail to do any duty, if such action leads to a benefit for yourself personally or gives unfair preference to anyone;
- (3) You must do everything required of your job to make sure that the Salem Housing Authority does not fail to provide clients with appropriate services;
- (4) You may not harass, intimidate or discriminate against any co-workers or the public in doing your job;
- (5) You may not do anything which results in taking money illegally;
- (6) You may not do anything which results in the misuse or abuse of Salem Housing Authority property.

YOU MUST UNDERSTAND AND FOLLOW THIS CODE AND OTHER LAWS

This Code applies to all Salem Housing Authority employees including anyone on any type of leave status such as sick leave, military leave, leave without pay, civic duty leave, and suspension.

You are required to read the Code of Ethics and abide by its rules.

If you do not follow the rules and guidelines in the Code, you will be subject to disciplinary action.

However, this code is not to be considered all inclusive. Acts not mentioned in the Code may also result in disciplinary action.

Disciplinary actions may result in termination.

If you have any doubt or misunderstanding about the Code, you should seek information regarding that doubt or misunderstanding from your Department Head or the Executive Director.

BREAKING OTHER LAWS MAY AFFECT YOUR JOB

You are required to obey the laws of the United States and of its states. If you are convicted of a crime, you may face disciplinary action. This could include termination.

You must follow all of the policies and operating procedures of the Salem Housing Authority and the Department in which you work.

YOUR CONDUCT, ATTITUDE AND DEMEANOR ARE IMPORTANT

You must act in a professional, courteous manner and avoid any conduct which gives the appearance of conflict of interest, or is contrary to the rules of this Code. For example, you are not permitted to do the following:

1. Use your official position for private gain.
2. Give preferential treatment to any citizen or organization unless it is required as part of your job.
3. Make ~~work-related~~ decisions contrary to Salem Housing Authority policies.
4. Use your official position to discriminate against others on the basis of race, sex, age, handicap, religion, sexual orientation, veteran status or national origin.
5. Use your official position to threaten or harass others. This includes sexual harassment of any kind. The Authority's Sexual Harassment Policy fully defines "sexual harassment."
6. Make any false or misleading verbal or written statements in matters of official interest.
7. In the course of your official duties, recommend or suggest, even by implication, that a member of the public retain the services of any particular accountant, attorney, or any other person, professional or business organization in connection with any official business which involves or may involve the Salem Housing Authority or is subject to competitive bidding.
8. Publish, disclose or make known in any manner or to any extent not authorized by law any information relating to: trade secrets, processes, operations, style of work or apparatus, blue prints, statistical data, personnel data, amount or source of any income, profits, losses, or expenditures of any person, firm, party, corporation or association involved in Salem Housing Authority business.
9. Release any information pursuant to the public information laws without proper authorization from the Executive Director.
10. Use your official duties to interfere with, affect or influence the results of a nomination or election for public office.
11. Use your official authority directly or indirectly to coerce, attempt to coerce, command, advise or prevent any person or body to pay, lend or contribute anything of value to any party, candidate or political committee.
12. Solicit other Salem Housing Authority employees, accept funds or anything of value for any party, political committee, agency, person or organization for political purposes, campaign for political office or wear a campaign or political button while on duty.

SALEM HOUSING AUTHORITY

OPERATING BUDGET - DRAFT

FYE
September 30, 2025

February 12, 2025

Description	Account	MA 55-3&7	Section 8	4001	MRVP	NIGMT	2025 Budget	2024 Budget	S Change	% Change
Rental Income										
Interest on Investments										
Other Income	3110	183,783		3,839,181			4,022,964	3,979,669	43,295	1.09%
Administrative Fee	3610	30,000	20,000	60,000	600		110,600	12,750	97,850	767.45%
Capital Fund Contributions										
Subsidy Calculation										
Total Funds Available	3690	22,200	214,988	169,321		20,000	426,509	419,343	7,166	1.71%
Administrative Salaries										
Compensated Absences										
Legal	3801		1,951,630		29,040	131,532	2,112,202	2,201,709	(89,507)	-4.07%
Members Compensation										
Travel										
Accounting Fees	8020						-	-	-	0.00%
Audit Fees										
Office Rent										
Administrative Other	8020	180,162		1,887,478			2,067,640	1,824,758	242,882	13.31%
Social Service Coordinators										
Total Administrative Expenses	4110	416,145	2,186,618	5,955,980	29,640	151,532	8,739,915	8,438,229	301,686	3.58%
Resident Services										
Maintenance Labor		39,891	1,103,338	706,989	13,765	76,972	1,940,955	1,703,455	237,500	13.94%
Maintenance Materials	4120	937	22,067				23,004	46,902	(23,898)	-50.95%
Maintenance Contractual										
Total Maintenance Expenses										
Insurance	4130	5,000	110,000	270,000	500	2,000	387,500	172,500	215,000	124.64%
PIL-OT	4140			26,325			26,325	24,075	2,250	9.35%
Employee Benefits										
Collection Losses										
Other General	4150	370	12,782	6,848			20,000	18,000	2,000	11.11%
Total General Expenses										
Total Non-Utility Expenses	4170	9,984	28,192	19,542	1,668	5,256	64,642	63,842	800	1.25%
	4171	555	19,173	15,630	642		36,000	28,000	8,000	28.57%
	4180		68,528				68,528	84,300	(15,772)	-18.71%
	4190	12,585	393,152	195,900	2,500	18,000	622,137	547,681	74,456	13.59%
	4191			147,782			147,782	75,948	71,834	94.58%
4100's										
	4200's	69,322	1,757,232	1,389,016	19,075	102,228	3,336,873	2,764,703	572,170	20.70%
	4410									
		975		10,375			11,350	5,031	6,319	125.60%
	4420	53,771		860,342			914,113	878,536	35,577	4.05%
		18,000		300,000			318,000	318,000	-	0.00%
	4430	41,000		461,000			502,000	494,000	8,000	1.62%
4400's										
	4510	112,771	-	1,621,342	-	-	1,734,113	1,690,536	43,577	2.58%
		128,309	52,283	281,993	439	2,468	465,492	423,673	41,819	9.87%
	4520	11,883		13,500			25,383	23,697	1,686	7.11%
	4540	37,749	444,700	631,833	5,524	31,074	1,150,880	1,034,937	115,943	11.20%
	4570	1,000		40,000			41,000	32,000	9,000	28.13%
	4590		160,000				160,000	160,000	-	0.00%
4500's										
		178,941	656,983	967,326	5,963	33,542	1,842,755	1,674,307	168,448	10.06%
		362,009	2,414,215	3,988,059	25,038	135,770	6,925,091	6,134,577	790,514	12.89%
Water	4310	24,663		508,869			533,532	509,174	24,358	4.78%
Electricity	4320	24,474		859,245			883,719	1,093,442	(209,723)	-19.18%
Gas	4330	15,821		113,944			129,765	140,126	(10,361)	-7.39%
Total Utilities Expenses	4300's									
Total Routine Expenses										

	64,958	-	1,482,058	-	-	1,547,016	1,742,742	(195,726)	-11.23%
Net Surplus (Deficit) before Non-Routine Expense	426,967	2,414,215	5,470,117	25,038	135,770	8,472,107	7,877,319	594,788	7.55%
	(10,822)	(227,597)	485,863	4,602	15,762	267,808	560,910	(293,102)	-52.25%

	35,000	-	483,000	-	-	518,000	522,000	(4,000)	-0.77%
	(45,822)	(227,597)	2,863	4,602	15,762	(250,192)	38,910	(289,102)	-743.00%
Extraordinary Maintenance	6510	30,000	300,000			330,000	275,000	55,000	20.00%
Equipment Non-Capitalized	7520	5,000	75,000			80,000	49,000	31,000	63.27%
Equipment Capitalized	7540	-	108,000			108,000	198,000	(90,000)	-45.45%

Total Non-routine Expenses

Net Surplus (Deficit) after Non-Routine Expenses

Number of Units	39	1,346	45		2,106				
		676			2,088				
Maximum Reserve (50% of Total Expenses)		1,207,108	12,519		67,885	4,441,055	4,100,660		
	230,984	2,922,559							
Minimum Reserve (35% of Maximum Reserve)		422,488	4,382		23,760	1,554,370	1,435,231		
	80,844	1,022,896							
Current Reserve		2,069,942	157,072		120,361	4,614,286	4,565,340		
	191,345	2,075,566							
Net Surplus (Deficit)		(227,597)	4,602		15,762	(250,192)	38,910		
	(45,822)	2,863							
	145,523	2,078,429							
							4,604,250		
Projected Reserve	63%	1,842,345	71%	161,674	136,123	4,364,094			
Percent of Maximum		153%		1291%	201%	98%	112%		
Amount above (below) Minimum	64,679	1,419,857	1,055,533	157,292	112,363	2,809,724	3,169,019		
Percent of Total Reserves	3%	42%	48%		4%	3%	100%	100%	

Salem Housing Authority

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Project MA55-003&7 Budget 39 Units

Budget for the Year Ending 9/30/2025 468 Unit Months

Account Description	2024 Actual	2024 Budget	2025 Budget	\$ Change	% Change
3110 Dwelling Rental Income	169,465	173,941	183,783	9,842	5.66%
3610 Interest Income	5,931	2,000			1400.00%
			30,000	28,000	
3690 Other Income	12,974	21,500			3.26%
			22,200	700	
8020 Capital Fund Contributions	-	-			0.00%
			-	-	
8020 Subsidy	163,663	193,033			-6.67%
			180,162	(12,871)	

Total Income		352,033	390,474	416,145	25,671	6.57%
4110	Administrative Salaries	38,275	37,075	39,891	2,816	7.60%
4120	Compensated Absences	5,746	905	937	32	3.54%
4130	Legal	5,229	5,000	5,000	-	0.00%
4150	Travel	719	336	370	34	10.12%
4170	Accounting	8,888	9,936	9,984	48	0.48%
4171	Audit Fees	412	411	555	144	35.04%
4180	Office Rent	-	808	-	(808)	-100.00%
4190	Sundry	10,987	12,354	12,585	231	1.87%
4230	Resident Services	-	975	975	-	0.00%
4310	Water	23,945	22,729	24,663	1,934	8.51%
4320	Electricity	23,761	34,293	24,474	(9,819)	-28.63%
4330	Gas	15,360	14,951	15,821	870	5.82%
4410	Maintenance Labor	48,746	53,464	53,771	307	0.57%
4420	Maintenance Materials	16,489	18,000	18,000	-	0.00%
4430	Maintenance Contractual	37,958	48,000	41,000	(7,000)	-14.58%
4510	Insurance	70,543	109,600	128,309	18,709	17.07%
4520	Pilot	10,640	10,197	11,883	1,686	16.53%
4540	Employee Benefits	39,165	36,326	37,749	1,423	3.92%
4570	Collection Losses	(256)	2,000	1,000	(1,000)	-50.00%
Total Operating Expenses		356,607	417,360	426,967	9,607	2.30%
Net Income (Loss) Before Non-routine Expenses		(4,574)	(26,886)	(10,822)	16,064	-59.75%
4610	Extraordinary Maintenance 7500	11,455	28,000	35,000	7,000	25.00%
Capital Expenditures		-	-	-	-	0.00%
Total Non-routine Expenses		11,455	28,000	35,000	7,000	25.00%
Total Expenses		-	-	-	-	0.00%
Net Surplus (Deficit)		11,455	28,000	35,000	7,000	25.00%
		368,062	445,360	461,967	16,607	3.73%
		(16,029)	(54,886)	(45,822)	9,064	-16.51%

Reserve Balance -		207,374
9/30/2023	90%	(16,029)
Percent of Max		
Reserve Balance -		191,345
9/30/2024	83%	(45,822)
Percent of Max		
Projected Reserve Balance -		145,523
9/30/2025 Percent of Max	63%	
Amount Above or (Below) Minimum		64,679

Salem Housing

Authority

Section 8 Budget

Max Monthly Units

1,346

Budget for the Year

Max Annual Units

Ending 9/30/2025

16,152

	2024	2024	2025	\$	%
<u>Calculation of</u>	<u>Actual</u>	<u>Budget</u>	<u>Budget</u>	<u>Change</u>	<u>Change</u>
<u>Administrative</u>					
<u>Fee</u>					
Administrative					
Fee Rate - 600					
Units	152.40	148.89	152.40		
Administrative		138.95	142.23		
Fee Rate - >600	142.23				
Units					
Proration Factor	92%	97%	92%		
Administrative					
3801Fee - 600 Units	1,016,706	1,039,848	1,009,498	(30,350)	-2.92%
3801Administrative		1,018,948	942,132		-7.54%
Fee - >600 Units	977,907			(76,816)	
3801FSS Grant		105,000	110,250		5.00%
	105,000			5,250	
3610Interest Income		5,000	20,000		300.00%
	5,696			15,000	
3300Mobility Fees		23,245	24,738		6.42%
	23,560			1,493	
3300Fraud Recovery		80,000	80,000		0.00%
	87,383			-	
3690Other Income		-	-		0.00%
	225			-	

Total Income		2,216,477	2,272,041	2,186,618	(85,423)	-3.76%
4110	Administrative Salaries	1,039,988	919,947	1,103,338	183,391	19.93%
4120	Compensated Absences	14,907	45,997	22,067	(23,930)	-52.03%
4130	Legal	108,520	45,000	110,000	65,000	144.44%
4150	Travel	6,495	11,603	12,782	1,179	10.16%
4170	Accounting	24,200	27,660	28,192	532	1.92%
4171	Audit Fees	14,180	14,181	19,173	4,992	35.20%
4180	Office Rent	65,083	83,492	68,528	(14,964)	-17.92%
4190	Sundry	372,980	380,638	393,152	12,514	3.29%
4510	Insurance	40,938	46,642	52,283	5,641	12.09%
4540	Employee Benefits	353,507	368,748	444,700	75,952	20.60%
4590	Other General - Port Out Fees	154,728	160,000	160,000	-	0.00%
7520	Equipment	-	-	-	-	0.00%
Total Expenses		-	-	-	-	0.00%
Net Surplus (Deficit)		2,195,526	2,103,908	2,414,215	310,307	14.75%
		20,951	168,133	(227,597)	(395,730)	-235.37%
Reserve Balance - 9/30/2023				2,048,991		
Net Income - Current Year				20,951		
Reserve Balance - 9/30/2024				2,069,942		
Budgeted Net Income				(227,597)		
Projected Reserve Balance - 9/30/2025				1,842,345		

Salem Housing Authority

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4001 Budget

676 Units

Budget for the Year Ending 9/30/2025

8,112 Unit Months

Account	Description	2024 Actual	2024 Budget	2025 Budget	\$ Change	% Change
4110	Administrative Salaries	651,118	657,035	706,989	49,954	7.60%
4120	Compensated Absences	16,352	-	-	-	0.00%
4130	Legal	222,613	120,000	270,000	150,000	125.00%
4140	Members Compensation	31,093	24,075	26,325	2,250	9.35%
4150	Travel	2,016	6,061	6,848	787	12.98%
4170	Accounting Fees	16,995	19,358	19,542	184	0.95%
4171	Audit Fees	19,124	13,124	15,630	2,506	19.09%
4190	Administrative Other	182,735	148,689	195,900	47,211	31.75%
4191	Resident Services Coordinator	93,576	75,948	147,782	71,834	94.58%
4230	Resident Services	17,033	4,056	10,375	6,319	155.79%
4410	Maintenance Labor	846,088	825,072	860,342	35,270	4.27%

4420	Maintenance Materials	285,872	300,000	300,000	-	0.00%
4430	Maintenance Contractual	420,893	446,000	461,000	15,000	3.36%
4510	Insurance	254,061	264,490	281,993	17,503	6.62%
4520	PII.OT	13,243	13,500	13,500	-	0.00%
4540	Employee Benefits	636,537	594,054	631,833	37,779	6.36%
4570	Collection Losses	44,366	30,000	40,000	10,000	33.33%
	Total	3,753,715	3,541,462	3,988,059	446,597	12.61%

Change in CAP	442,917		
New CAP	4,334,601		
Balance Available	346,542		
Non-Utility Expenses	3,988,059	Maximum Operating Reserve (50% of Total Operating Expenses less DHCD Costs)	2,922,559
Utilities	<u>1,482,058</u>	Minimum Operating Reserve (35% of Max)	1,022,895
Total Operating Expenses	5,470,117	Beginning Operating Reserve	2,075,566
Total Income	<u>4,068,502</u>		71% of Maximum
Net Income (Deficit) Before Subsidy	(1,401,615)	Net Income (Deficit)	2,863
Subsidy To Be Earned	1,887,478	Projected Reserve Balance - 9/30/2025	2,078,429
			71% of Maximum
Non-Routine Expenses	<u>483,000</u>		1,055,534 over Minimum
Net Income (Deficit)	<u>2,863</u>		

DEPARTMENT OF HOUSING & COMMUNITY DEVELOPMENT Page 5
APPENDIX B OPERATING SUBSIDY CALCULATION "ANUEL" (TO 050-1 (ALLOWABLE NON-UTILITY EXPENSE LEVEL)
AND 051-1)

BUDGET AND ACTUAL (ACTUAL USED AT YEAR END ONLY)

I.H.A Name: Salem Housing Authority
Fiscal Year Ending 9/30/2025

Program No. 4001

					<u>050-1</u>	<u>051-1</u>	
1ST	2ND	3RD	4TH		1	2	3

BUDGETED AMOUNT	DHCD MODIFIC.	ACTUAL AMOUNT	DHCD MODIFIC.
3,929,181			
3,690,978			
12% 4,133,895			
25,000			
1,482,058			
(1,711,772) (1,711,772) 1,711,772			
25,706			
70,000			
80,000			

Quarter				
---------	--	--	--	--

1,887,478			

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 1.12%) 442,917
- 3A. APPROPRIATE % OF LINE 3 (COLUMN 3 ONLY)
4. DHCD APPROVED OPERATING COSTS

EXEMPTIONS

Trash Removal - All Sites

(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)

5. UTILITIES (Line 29 050-1 for Budget)
8. DHCD APPROVED EXEMPTIONS

BUDGET ACTUAL OVERRUN

9. 4110
10. 4150
11. Total
12. TOTAL SUBSIDY (LINE 7 + 8 - 11) (050-1 OR 051-1)

13. REDUCE ACTUAL SUBSIDY BY THE AMOUNT

DIRECT REIMBURSEMENT

Social Service Coordinator Salary
Resident Service Coordinator
Resident Service Coordinator NOW

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)

REDUCE ACTUAL SUBSIDY BY COST OVERRUNS

		0
		0
		0

Salem Housing Authority
MRVP/DMH Budget
Budget for the Year Ending 9/30/2025

Page 6

	2024 Actual	2024 Budget	2025 Budget	\$ Change	% Change
Calculation of Administrative Fee					
Number of Units	34	27	44		

20,375	16,200	29,040	12,840	79.26%
612	750	600	(150)	-20.00%
-	-	-	-	0.00%
20,987	16,950	29,640	12,690	74.87%
8,329	8,398	13,765	5,367	63.91%
377	-	-	-	0.00%
185	500	500	-	0.00%
-	-	-	-	0.00%
1,485	1,656	1,668	12	0.72%
284	284	642	358	126.06%
2,208	2,000	2,500	500	25.00%
210	280	439	159	56.79%
<u>3,234</u>	<u>3,415</u>	<u>5,524</u>	<u>2,109</u>	<u>61.76%</u>
<u>16,312</u>	<u>16,533</u>	<u>25,038</u>	<u>8,505</u>	<u>51.44%</u>
<u>4,675</u>	<u>417</u>	<u>4,602</u>	<u>4,185</u>	<u>1003.60%</u>

Unit Fee

50

50

55

Maximum Fee

Interest Income

Other Revenue Total Income

4110 Administrative Salaries
4120 Compensated Absences
4130 Legal
4150 Travel
4170 Accounting
4171 Audit Fees
4190 Sundry
4510 Insurance
4540 Employee Benefits

Net Surplus (Deficit)

Reserve Balance - 9/30/2023	152,397
Net Income - Current Year	<u>4,675</u>
Reserve Balance - 9/30/2024	157,072
Budgeted Net Income	<u>4,602</u>
Projected Reserve Balance - 9/30/2025	<u>161,674</u>

Salem Housing Authority
Management Budget
Budget for the Year Ending 9/30/2025

Page 7

Account	Description	2024 Actual	2024 Budget	2025 Budget	\$ Change	% Change
<u>Operating Receipts</u>						
3110.1	Management Fees - Marblehead	125,387	126,713	131,532	4,819	3.80%
-	-	-	-	-	-	- 0.00%
3690	Other Operating Receipts	112,418	10,000	20,000	10,000	100.00%
	Total Operating Receipts	237,805	136,713	151,532	14,819	10.84%
<u>Operating Expenditures</u>						
4110	Administration Salaries	80,291	81,000	76,972	(4,028)	-4.97%
-	-	-	-	-	-	- 0.00%
4130	Legal	-	-	2,000	2,000	- 0.00%
4150	Travel and Related Expenses	-	-	-	-	- 0.00%
5,232	5,256	24	0.46%	4170	Accounting Services	5,232
5,232	5,256	24	0.46%	4190	Administrative Other	62,917
4510	Insurance	4,980	2,661	2,468	(193)	-7.25%
4540	Employee Benefits	35,044	32,394	31,074	(1,320)	-4.07%
	Total Operating Expenditures	127,287	135,770	8,483	6.66%	
	Net Surplus (Deficit)	44,778	9,426	15,762	6,336	67.22%
	Reserve Balance	75,583	75,583	120,361	44,778	59.24%
	Projected Reserve Balance	120,361	85,009	136,123	51,114	60.13%

Total Projected Rental Income

183,783	3,839,181	1,272,466	2,243,112	323,603
---------	-----------	-----------	-----------	---------

Interest Income:

Investment Balances

Interest Rate

600,000	1,200,000	322,045	795,527	82,428
5.00%	5.00%	5.00%	5.00%	5.00%

Total Projected Interest Income

30,000	60,000	16,102	39,776	4,121
--------	--------	--------	--------	-------

Other Income:

3,000

19,200

30,000

30,000

22,200	30,000	-	30,000	-
--------	--------	---	--------	---

103,316

103,316

36,005

27,697

8,308

-	139,321	27,697	111,624	-
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Salem Housing Authority

Income Projections

Budget for the Year Ending 9/30/2025

235,983	4,068,502	1,316,265	2,424,512	327,724
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Rental Income:

Monthly Rent Roll - 9/30/2024

Number of Months

Units Occupied

Total Units

Average Rent/Unit

Inflation Factor

MA 55-3&7	4001	200s	667s	705s
15,015	313,658	103,960	183,260	26,438
12	12	12	12	12
38	617	164	411	42
39	626	168	415	43
395.13	508.36	633.90	445.89	629.48
2%	2%	2%	2%	2%

Occupancy Percentage 97% 99% 98% 98%

Washers & Dryers

Parking

Total Projected Other Income

Other Retained Revenue:

Antenna - AT&T and Metro PCS

Fraud Recovery

Total Projected Retained Revenue

Total Projected Income

Schem Housing Authority
Schedule of Administrative Salaries
Budget for the Year Ending 9/30/2025

Location	2024 Budget Code W/ Longevity	2024 Actual W/O Longevity	Longevity Total	2025 Total 1.89	MASS	ITC	ABSL	DMU	Health/Benef	MGMT	Resident Services	Total
Executive Director	1	197,995	197,995		3,573	108,663	66,136	4,123		36,306		209,101
1 Hong, Cathy					0.017	0.520	0.318	0.020		0.126		1.000
Assistant Executive Director	1	130,542	129,667	875	2,631	90,888	45,640	3,043				142,212
2 Tasker, Debra					0.019	0.639	0.321	0.021				1.000
Executive Assistant	1	74,514	74,039	475	1,469	46,585	24,453	1,630	5,000			81,177
3 Cuervo, Anne					0.019	0.639	0.321	0.021				1.000
Accounting Coordinator	1	70,596	70,246	350	1,308	45,169	23,687	1,512		6,242		76,918
4 Coyette, Elizabeth					0.019	0.639	0.321	0.021				1.000
Accounting Coordinator	1	41,217	41,217		832	28,712	14,421	961				46,926
5 Larnhee, Beverly					0.019	0.639	0.321	0.021				1.000
Director of Public Housing	2	96,538	96,063	475	4,927		84,650			15,066		105,183

17 Emily Gomez				1.106		1.000				1.000						
Maintenance Director	2	147,783	147,783	161,083	7,715		132,561		20,807	161,083						
18 Dean, Gary				1.090	0.008		0.823		0.129	1.000						
Operations and Facilities Manager	2	81,211	80,861	88,488	4,151	5,000	71,326		8,011	88,488						
19 Lopez, Luis				1.090	0.007	0.057	0.806		0.091	1.000						
Section 8 Housing Coordinator	8	58,422	58,422	63,679		63,679				63,679						
20 Doady, Katherine				1.090		1.000				1.000						
Director of Finance	15	100,475	100,000	109,475	475	54,738	15,327	1,095	38,315	109,475						
21 Garcia, Massed				1.090		0.500	0.140	0.010	0.350	1.000						
Social Service Coordinator	14	35,053	35,053	38,207						38,207						
22 Kintenz, Mary Ann				1.090						1.000						
Resident Service Coordinator	14	40,895	40,895	44,575						44,575						
23 Valenti, Kathleen				1.090						1.000						
Section 8 Inspector	8	-	-	65,010		65,010				65,010						
24 Sousa, Rebecca						1.000				1.000						
Resident Service Coordinator - NCW	14	-	-	65,000						65,000						
25 Dominguez, Alexandra										1.000						
Prior Budget		1,819,568	314,468	5,102,412,692	30,801	1,003,338	206,489	13,765	43,315	76,973	447,782	2,132,402	31,248	\$ change	17.7%	challenge
				1,819,568			37,075	0,10,047	452,035		8,708	40,165	31,080	75,958	1,819,568	

Salem Housing Authority
Schedule of Administration Expenses Other Than Salaries
Budget for the Year Ending 9/30/2025

387,500	5,000	110,000	270,000	500	2,000	387,500
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Description	Code	2024 Budget	2025 Budget	1 MA 55	2 HCV	3 4001	4 DMH	5 MGMT	Total
1 Legal D		172,500							
2 Members' Compensation	D	24,075	26,325			26,325			26,325

20,000	370	12,782	6,848	-	-	20,000
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LHA Travel

1 Outside Area of LHA Jurisdiction	3	12,000	12,000	222	7,669	4,109		12,000
2 Within Area of LHA Jurisdiction	3	6,000	8,000	148	5,113	2,739		8,000
3 Total Other LHA Travel		18,000						

28,000	576	24,002	3,422	-	-	28,000
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Administrative Expenses - Other
Conventions and Meetings

1 Training Seminars - IHUD	8	3,000	5,000		5,000			5,000
2 MA NAHRO Conferences	3	5,000	5,000	93	3,196	1,711		5,000
3 National NAHRO	6	8,000	8,000	240	7,760			8,000
4 NERC NAIRO	6	4,000	5,000	150	4,850			5,000
5 Other	3	6,000	5,000	93	3,196	1,711		5,000
6 Total Conventions & Training		26,000						
1 Telephones	3	27,500	28,500	528	18,214	9,758		
2 Computers	3	57,947	62,583	1,158	39,997	21,428		
3 Copier	3	11,118	12,007	222	7,674	4,111		
4 Internet	3	11,016	11,897	220	7,603	4,074		
5 Postage	3	27,000	30,000	555	19,173	10,272		
6 Postage Lease	3	4,300	4,300	80	2,748	1,472		

7	Answering Service	3	2,800	2,800	52	1,789	959	2,800
8	Advertising D	14,500	17,000	1,000	6,000	10,000	17,000	
9	Membership Dues	3	13,000	18,050	75	9,975	8,000	18,050
10	Publications	3	2,000	2,000	37	1,278	685	2,000
11	Licenses	2	2,100	2,300	126	2,174	2,300	
12	Constable D	1,500	3,000	3,000	3,000			
13	Collection Fees & Court Costs	D	5,000	15,700	700	5,000	10,000	15,700
14	Printing	3	34,000	44,000	3,500	5,000	35,000	500 44,000
15	Shredding	3	2,000	2,000	37	1,278	685	2,000
16	Interpreter	3	2,000	2,000	37	1,278	685	2,000
17	Inspections	D	66,000	70,000	1,000	65,000	4,000	70,000
18	Office Supplies	D	209,500	236,000	2,000	165,000	49,000	2,000 18,000 236,000
19	Insurance Consultant	3	2,000	2,000	37	1,278	685	2,000
20	Recycling Permits	2	6,000	6,000	330	5,670	6,000	
21	Payroll Fees	3	6,000	6,000	111	3,835	2,054	6,000
22	Software	3	9,400	11,000	204	7,030	3,766	11,000

23	Total Sundry	542,681			617,137	12,585	393,152	190,900	2,500	18,000	617,137
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24 Accounting Fees D
25 Audit and AUP I
26 Service Coordinator D

63,842	64,642	9,984	28,192	19,542	1,668	5,256	64,642
28,000	36,000	555	19,173	15,630	642		36,000
5,000	5,000			5,000			5,000

Total Administration Expenses	854,098	1,156,604	28,494	563,299	534,245	5,310	25,256	1,156,604
Prior Year Budget		854,098	28,037	479,082	331,307	4,440	11,232	854,098

Summary of Cost Distribution

Account	MA 55	HCV	4001	DMH
MGMT	Total			
4130	5,000	110,000	270,000	500
2,000	387,500			
4140	-	-	26,325	-
-	26,325			
4150	370	12,782	6,848	-
-	20,000			
4170	9,984	28,192	19,542	1,668
4171	555	19,173	15,630	642
	-			
	36,000			
	4190	12,585	393,152	195,900
	18,000	622,137		2,500
		28,494	563,299	534,245
			5,310	25,256
				1,156,604

Salem Housing Authority
Schedule of Maintenance Positions and Labor Costs
Budget for the Year Ending 9/30/2025

Position	Code	2024 Budget Rate
1 Electrician 75%/ Laborer 25% Powers, Craig	10	42.97
2 Maint. Mech II 60%/ Laborer 40% Vega-Lopez, Jose	10	38.44
3 Maint. Mech I 60%/ Laborer 40% Debenedictis, John	10	33.54
4 Maint. Mech I 60%/ Laborer 40% Norris, William	10	33.54
5 Maint. Mech I 60%/ Laborer 40% Bishop, Patric	10	30.36
6 90% Laborer/ 10% M.Mech I Rudloff, Christian	10	30.36
7 Maint. Mech I 60%/ Laborer 40% Felton, Charles	10	33.54
8 90% Plumber/ 10% Laborer Vacant	10	49.91
9 Foreman (90% MM, 10% Laborer) plus \$3.00 Fitzgerald, Michael	13	38.44
10 Temporary	10	15.00
Total		
Prior Year Budget		1.04
Percentage Change		
Overtime		
Rate Differentials		
Longevity On Call		
Total Maintenance Labor		

			1	2	3	4	5	6
			745,598	40,716	-	704,882	-	745,598
			719,888	39,978	-	679,910	-	719,888
			Budget	MA 55	HCV	DMII	Mod	MGMT
			18,640	1,018	17,622	1,000		18,640
			4,075	4,075				4,075
			75,254	1,136	75,254	19,664		75,254
			20,800		19,664			20,800
			914,113	53,771	-	860,342	-	914,113
			71,157		71,157			71,157
			1,000		1,000			
			71,157		71,157			71,157
			1,000		1,000			
			71,157		71,157			71,157
			1,000		1,000			
			64,418		64,418			64,418
			1,000		1,000			
			71,157		71,157			71,157
			1,000		1,000			
			105,893		105,893			105,893
			1,000		1,000			
			81,432	40,716	40,716			81,432
			1,000	0.500	0.500			
			41,600		41,600			41,600
			1,000		1,000			

719,888

Average Rate Change

125,000
14,398 5.00%

4,950 14,300

878,536

	Code	2024 Budget	2025 Budget	MA 55	HCV	4001	DMH	Total
1	Materials and Supplies	318,000	318,000	18,000		300,000		318,000

	Maintenance Contracts	Vendor	2024 Budget	2025 Budget	MA 55	HCV	4001	DMH	Total
1	Elevator	Delta Beckwith	42,000	42,000	12,000		30,000		42,000
2	Extermination	A-1 Exterminators	12,000	15,000			15,000		15,000
3	Inspections	Various	5,000	5,000			5,000		5,000
4	Vehicle Maintenance	Various	15,000	15,000	1,000		14,000		15,000
5	Equipment Maintenance	Various	5,000	5,000	1,000		4,000		5,000
6	Trash Removal	City of Salem	63,000	63,000	1,000		62,000		63,000
7	Infrastructure	MacKey & Sons	6,000	5,000	1,000		4,000		5,000
8	Painting	Bay Shore	31,000	35,000	1,000		34,000		35,000
9	Oil Burner Service	Arctic Oil	5,000	5,000			5,000		5,000
10	Locksmith	Hayden Safe & Lock	9,000	10,000	1,000		9,000		10,000
11	Common Area Cleaning	HUB Cleaning	45,000	45,000	7,000		38,000		45,000
12	Landscaping/Snow Removal	All-Pro/Greenscape	198,000	200,000	8,000		192,000		200,000
13	Fire Extinguisher Testing	Boston Fire	2,000	2,000			2,000		2,000
14	Compactor Cleaning	Chute Master	5,500	5,000	1,000		4,000		5,000
15	Sprinklers	Berry Fire	9,500	10,000	1,000		9,000		10,000
16	Flooring	Edge Pro Flooring	23,000	25,000	5,000		20,000		25,000
17	Generators	SBE/Dawes	3,000	5,000			5,000		5,000
18	Windows	Peabody Glass	3,000	5,000			5,000		5,000
19	Alarms	Wayne Alarm	7,000	5,000	1,000		4,000		5,000
20			5,000	-					-
Total Contract Costs			494,000	502,000	41,000		461,000		502,000

1.6%

Salem Housing Authority
Insurance Policies and Costs
Budget for the Year Ending 9/30/2025

84,990	91,385 75%
23,855	25,748
194,211	208,575
15,650	16,122
20,936	23,076
2,948	2,976
1,355	1,521
33,600	46,032
2,188	2,053
27,990	29,866
15,950	18,138
423,673	465,492

50,170	439	2,997	35,311	2,468	91,385
23,248		1,650	850		25,748
208,575					208,575
			16,122		16,122
		23,076			23,076
		2,976			2,976
		1,521			1,521
		46,032			46,032
		2,053			2,053
		29,866			29,866
		18,138			18,138
281,993	439	128,309	52,283	2,468	465,492

Type
Workers' Compensation

Insurer
NAHRO

Policy Date
2/7/24-25

Premium
2024

Premium
2025

4001

DMH

MA 55

HCV

MGMT

Total

	4.00%	X	3,046,165		
Auto			Safety	9/29/24-25	
Property			Hays	11/17/24-25	
Directors & Officers			Great American	1/3/24-25	
Property			Vermont Mutual	9/29/24-25	
Umbrella			Vermont Mutual	9/29/24-25	
Crime			Hanover	6/1/24-25	
Property/Liability		5 Barton Sq. Norfolk & Dedham		3/5/24-25	
Umbrella	5 Barton Sq. Norfolk & Dedham	3/5/24-25 Property	288 Essex	Philadelphia	4/1/24-25
Umbrella	5 Barton Sq. HUB		7/1/24-25		
Total					9.9%

Salem Housing Authority
Calculation of Employee Benefits and Payroll Prorations
Budget for the Year Ending 9/30/2025

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Retirement	7/1/2024	3 / 4 yr.	422,992
	7/1/2025	1 / 4 yr.	<u>162,147</u>
			585,139
Unemployment	0.20% of Salaries	3,046,165	6,092
Medicare	1.45% of Salaries	3,046,165	44,169
Health Insurance Tax	0.34% 36 employees @ \$15,000	540,000	1,836
Guardian/Dental Insurance			27,360
Group Insurance	97,777 Active		
	21,400 Retiree		
	<u>2,394</u> Survivor		
	121,571 per Quarter		486,284

93,662	1,103,338	1,567,331	13,765	76,972	147,782	3,002,850
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0.033	0.386	0.549	0.005	0.027		1.000
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37,749	444,700	631,833	5,524	31,074		1,150,880
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36,326	368,748	594,054	3,415	32,394		1,034,937
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Total Employee Benefits 1,150,880

	<u>MA 55</u>	<u>HCV</u>	<u>4001</u>	<u>DMH</u>	<u>MGMT</u>	<u>Resident No Benefits</u>	<u>Total</u>
Administrative Salaries Total	<u>39,891</u>	<u>1,103,338</u>	<u>706,989</u>	<u>13,765</u>	<u>76,972</u>	<u>147,782</u>	<u>2,088,737</u>
Maintenance Salaries Total	<u>53,771</u>		<u>860,342</u>				<u>914,113</u>
Total Salaries							
Benefits Proration							
Programs' Portion of Benefit Costs							

Prior Budget							
Retirement	19,193	226,098	321,241	2,809	15,798		585,139
Unemployment	200	2,354	3,345	29	164		6,092
Medicare	1,449	17,067	24,249	212	1,192		44,169
Health Insurance Tax	60	709	1,008	9	50		1,836
Dental Insurance	897	10,572	15,021	131	739		27,360
Group Insurance	<u>15,950</u>	<u>187,900</u>	<u>266,969</u>	<u>2,334</u>	<u>13,131</u>		<u>486,284</u>
	37,749	444,700	631,833	5,524	31,074	-	1,150,880
	-	-	-	-	-	-	-

4001

Extraordinary Maintenance				
Description of Work	Development Number	Total Estimated Cost	% Complete Current Budget FYE	Estimated Expenditure FYE
1 Turnover	All	300,000		300,000
Total		300,000		300,000

Non-Capitalized Equipment				
Description of Equipment Items Non-Capitalized	Dev. No.	No. of Items	Item Cost	Estimated Expenditure in Year
1 Stoves	All	50	500	25,000
2 Floor Machine	All	2	5,000	10,000
3 Dumpsters	All	20	1,500	30,000
4 Drain Snake	All	2	5,000	10,000
Total				75,000

Capitalized Equipment and Improvements				
Description of Equipment Items Capitalized	Dev. No.	No. of Items	Item Cost	Estimated Expenditure in Year
1 Pickup Truck & Plow 2 Spider Lift	All	1	48,000	48,000
3 Lawn/Snow Machine	All	1	40,000	40,000
4	All	1	20,000	20,000
Total				108,000

MA 055

Extraordinary Maintenance and Betterments/Additions				
Description of Work	Development Number	Total Estimated Cost	% Complete Current Budget FYE	Estimated Expenditure FYE
		30,000		30,000

Equipment Requirements				
Description of Equipment Items Non-Capitalized	Dev. No.	No. of Items	Item Cost	Estimated Expenditure in Year
1 Stoves		10	500	5,000
Total				5,000

HOUSING AND FINANCE INFORMATION SYSTEM**Salem Housing Authority****Extract (Rev:** Initial Submission)**Board Meeting Type:** Regular**Meeting Date:** 2/12/2025**Meeting Time:** 6 : 00 PM**MEMBERS PRESENT** (ENTER ALL BOARD MEMBERS PRESENT AT THE MEETING LISTED ABOVE)**Enter Present Members****MEMBERS ABSENT** (ENTER ALL BOARD MEMBERS ABSENT FROM THE MEETING LISTED ABOVE)**Enter Absent Members****OTHERS PRESENT** (ENTER THE NAMES OF ALL NON-BOARD MEMBERS PRESENT AT THE MEETING ABOVE)**Enter Others Present****ANNUAL OPERATING BUDGET FOR STATE-AIDED HOUSING FISCAL YEAR:**

Motion: **Enter Name of Motion Initiator** moved that the proposed Operating Budget for State-Aided Housing of the **Salem Housing Authority** (Chapter 200 / 667 / 705 / 689 / MRVP), Program Number **4001** for fiscal year ending **9/30/2025** showing total revenue of \$ **5,955,980 (Acct. No. 3000)** and Total Expenses of \$ **5,845,117 (Acct. No. 4000)** thereby requesting a subsidy of \$ **1,887,478 (Acct. No. 3801)**, and further that the Executive Director's total annual salary of \$**209,101** for fiscal year ending **9/30/2025** be submitted to the Department of Housing and Community Development for its review and approval. **Enter Person Who Seconded** the motion which, upon roll-call, was passed by a vote of **Enter "For" Vote Total** to **Enter "Against" Vote Total**.

Certified as a true and correct copy of a resolution adopted at said meeting and on file and of record by:

Secretary/Ex-Officio Signature**Salem Housing Authority**_____
Date of Certification

By checking this box ☒ , this certification shall have the effect of being made under the seal of the **Salem Housing Authority**.

BUDGET CERTIFICATION – PART A

Each member of the **Salem Housing Authority** has exercised appropriate care and due diligence in reviewing and approving the annual budget and we, the undersigned members of the **Salem Housing Authority**, do certify, under the pains and penalties of perjury, the following:

1. That in the preparation of the Authority's Annual Operating Budget for Program Number **4001** for Fiscal Year ending **9/30/2025**:

- a. The Authority has complied with the provisions of the Ch. 121B of the Massachusetts General Laws, all regulations, rules and requirements promulgated thereunder that may apply to the administration of State-Aided Public Housing programs as set forth by DHCD, the Contract(s) for Financial Assistance, and, if applicable, the Master Subsidy Agreement.
- b. No person or persons employed by the Authority receive financial compensation for more than one position.
- c. The attached budget is complete and accurate in all respects and establishes funding for the requested Budget Year.

2. That we received and reviewed the quarterly operating statements for the previous quarters of the fiscal year for Program Number **4001**. We also acknowledge that we will receive, review and certify the year end statements for Program Number **4001**.

3. Please select the appropriate statement below:

- ☒ That the contract for employment for the Executive Director, if one has been fully executed per 760 CMR 4.05, and the Schedule of All Positions and Salaries and applicable account line items submitted with this budget fully reflects the total compensation for the Executive Director and each position included in the referenced Schedule.
- ☐ That there is no contract for employment for the Executive Director and the Schedule of All Positions and Salaries and applicable account line items submitted with this budget fully reflects the total compensation for the Executive Director and each position included in the referenced Schedule.

4. Please select the appropriate statement below:

- ☒ That no staff person has any relationship to any board member or other staff member of the **Salem Housing Authority**.
- ☐ That the attachment discloses all staff persons with any relationship to any board member or other staff member at the **Salem Housing Authority**.

BUDGET CERTIFICATION – PART B

The Executive Director of the **Salem Housing Authority** has exercised appropriate care and due diligence in the preparation of the annual budget and certifies under pains and penalties of perjury that the information provided is complete and accurate in all respects including the above statements.

Executive Director (Printed Name)

Signature

Date

BOARD MEMBER SIGNATURES BY SIGNING THIS DOCUMENT, ALL BOARD MEMBERS ACKNOWLEDGE AND AGREE WITH ALL INFORMATION CONTAINED IN THIS BUDGET CERTIFICATION (HAFIS EXTRACT AND BUDGET CERTIFICATION PARTS A, B & C) FOR THE **SALEM HOUSING AUTHORITY'S 4001** PROGRAM FOR FISCAL YEAR ENDING **9/30/2025**. ALL BOARD MEMBERS MUST SIGN WHETHER OR NOT PRESENT AT MEETING

Veronica Miranda		
Chairman (Printed Name)	Signature	Date
Aaron Paternoster		
Board Member (Printed Name)	Signature	Date
Romell Kidd		
Board Member (Printed Name)	Signature	Date
Doneeca Thurston-Chavez		
Board Member (Printed Name)	Signature	Date
Board Member (Printed Name)	Signature	Date
Board Member (Printed Name)	Signature	Date
Board Member (Printed Name)	Signature	Date
Board Member (Printed Name)	Signature	Date
Board Member (Printed Name)	Signature	Date

BUDGET CERTIFICATION – PART C

All signatories understand that an electronically filed version of this certification (saved as a PDF, PNG, JPG, etc.) is as valid as the original signatures. The original fully executed Certification will be kept on file at the **Salem Housing Authority** and will be available for review by DHCD and/or auditors upon request.

HOUSING AND FINANCE INFORMATION SYSTEM**Salem Housing Authority****Extract (Rev:** Initial Submission)**Board Meeting Type:** Regular**Meeting Date:** 2/12/2025**Meeting Time:** 6 : 00 PM**MEMBERS PRESENT** (ENTER ALL BOARD MEMBERS PRESENT AT THE MEETING LISTED ABOVE)**Enter Present Members****MEMBERS ABSENT** (ENTER ALL BOARD MEMBERS ABSENT FROM THE MEETING LISTED ABOVE)**Enter Absent Members****OTHERS PRESENT** (ENTER THE NAMES OF ALL NON-BOARD MEMBERS PRESENT AT THE MEETING ABOVE)**Enter Others Present****ANNUAL OPERATING BUDGET FOR STATE-AIDED HOUSING FISCAL YEAR:**

Motion: **Enter Name of Motion Initiator** moved that the proposed Operating Budget for State-Aided Housing of the **Salem Housing Authority** (Chapter 200 / 667 / 705 / 689 / MRVP), Program Number **MRVP** for fiscal year ending **9/30/2025** showing total revenue of \$ **29,640 (Acct. No. 3000)** and Total Expenses of \$ **25,038 (Acct. No. 4000)** thereby requesting a subsidy of \$ **0 (Acct. No. 3801)**, and further that the Executive Director's total annual salary of \$**209,101** for fiscal year ending **9/30/2025** be submitted to the Department of Housing and Community Development for its review and approval. **Enter Person Who Seconded** the motion which, upon roll-call, was passed by a vote of **Enter "For" Vote Total** to **Enter "Against" Vote Total**.

Certified as a true and correct copy of a resolution adopted at said meeting and on file and of record by:

Secretary/Ex-Officio Signature**Salem Housing Authority**_____
Date of Certification

By checking this box ☒ , this certification shall have the effect of being made under the seal of the **Salem Housing Authority**.

BUDGET CERTIFICATION – PART A

Each member of the **Salem Housing Authority** has exercised appropriate care and due diligence in reviewing and approving the annual budget and we, the undersigned members of the **Salem Housing Authority**, do certify, under the pains and penalties of perjury, the following:

1. That in the preparation of the Authority's Annual Operating Budget for Program Number **MRVP** for Fiscal Year ending **9/30/2025**:

- a. The Authority has complied with the provisions of the Ch. 121B of the Massachusetts General Laws, all regulations, rules and requirements promulgated thereunder that may apply to the administration of State-Aided Public Housing programs as set forth by DHCD, the Contract(s) for Financial Assistance, and, if applicable, the Master Subsidy Agreement.
- b. No person or persons employed by the Authority receive financial compensation for more than one position.
- c. The attached budget is complete and accurate in all respects and establishes funding for the requested Budget Year.

2. That we received and reviewed the quarterly operating statements for the previous quarters of the fiscal year for Program Number **MRVP**. We also acknowledge that we will receive, review and certify the year end statements for Program Number **MRVP**.

3. Please select the appropriate statement below:

- ☒ That the contract for employment for the Executive Director, if one has been fully executed per 760 CMR 4.05, and the Schedule of All Positions and Salaries and applicable account line items submitted with this budget fully reflects the total compensation for the Executive Director and each position included in the referenced Schedule.
- ☐ That there is no contract for employment for the Executive Director and the Schedule of All Positions and Salaries and applicable account line items submitted with this budget fully reflects the total compensation for the Executive Director and each position included in the referenced Schedule.

4. Please select the appropriate statement below:

- ☒ That no staff person has any relationship to any board member or other staff member of the **Salem Housing Authority**.
- ☐ That the attachment discloses all staff persons with any relationship to any board member or other staff member at the **Salem Housing Authority**.

BUDGET CERTIFICATION – PART B

The Executive Director of the **Salem Housing Authority** has exercised appropriate care and due diligence in the preparation of the annual budget and certifies under pains and penalties of perjury that the information provided is complete and accurate in all respects including the above statements.

Cathy Hoog

Executive Director (Printed Name)

Signature

Date

BOARD MEMBER SIGNATURES BY SIGNING THIS DOCUMENT, ALL BOARD MEMBERS ACKNOWLEDGE AND AGREE WITH ALL INFORMATION CONTAINED IN THIS BUDGET CERTIFICATION (HAFIS EXTRACT AND BUDGET CERTIFICATION PARTS A, B & C) FOR THE SALEM HOUSING AUTHORITY'S MRVP PROGRAM FOR FISCAL YEAR ENDING 9/30/2025. ALL BOARD MEMBERS MUST SIGN WHETHER OR NOT PRESENT AT MEETING

Veronica Miranda		
Chairman (Printed Name)	Signature	Date
Aaron Paternoster		
Board Member (Printed Name)	Signature	Date
Romell Kidd		
Board Member (Printed Name)	Signature	Date
Doneeca Thurston-Chavez		
Board Member (Printed Name)	Signature	Date
Board Member (Printed Name)	Signature	Date
Board Member (Printed Name)	Signature	Date
Board Member (Printed Name)	Signature	Date
Board Member (Printed Name)	Signature	Date
Board Member (Printed Name)	Signature	Date
Board Member (Printed Name)	Signature	Date

BUDGET CERTIFICATION – PART C

All signatories understand that an electronically filed version of this certification (saved as a PDF, PNG, JPG, etc.) is as valid as the original signatures. The original fully executed Certification will be kept on file at the Salem Housing Authority and will be available for review by DHCD and/or auditors upon request.

EXECUTIVE OFFICE OF HOUSING AND LIVABLE COMMUNITIES
Local Housing Authority Executive Director Salary Calculation Worksheet

Effective for Fiscal Years Beginning: July 1, 2024, October 1, 2024, January 1, 2025, April 1, 2025 V2.4

Instructions:

Use this Worksheet to determine the LHA Calculated Salary Maximum and to enter the Board-Approved Salary. Print and submit this Worksheet signed by the Board Chair to your Housing Management Specialist (HMS) by email only no later than your LHA's budget submission/revision deadline. An executive director of two LHAs (Dual ED) will need to submit two Worksheets, one for each LHA.

Enter data in clear cells only (see Worksheet sections with this arrow (→))
 Gray cells will auto-calculate

LHA Info: →

LHA Name:	Salem Housing Authority
LHA Office Hours:	8 AM to 4 PM
Executive Director:	Cathy Hoog
Current <u>Required</u> Work Hours / Week:	37.5
(Full Time Executive Director, enter 37.5)	Full Time
(Dual EDs enter current required work hours for one LHA only)	
For Existing Executive Directors Only:	
Enter all sources composite salary from most recent EOHLC-approved budget (Current Approved Salary):	\$ 197,995

Step 1. → Determine LHA's Size by the Total Number of Units

Note: Count only the units that are owned and operated by the LHA from programs that have created housing for income-eligible households, and count only the units currently "leased," not "contracted" for the LHA's voucher programs which are administered by the LHA. **Chapter 167 and Chapter 689 developments count as a single program.**

Do not include units or vouchers where the LHA does not own the unit or receive direct funding to administer the voucher, but instead receives a fee pursuant to a Management Services Agreement, or by another contract with a separate public or private entity where the contract is temporary or otherwise may terminate. Do not count resident service programs such as ABL, FSS, or MassLEAP.

Enter all information into the chart below. Please note that this Calculation Worksheet does not pro-rate salary share.

	Program	All Units	State Family Units
1	Chapter 200	168	168
2	Chapter 705	43	43
3	Chapter 667 Regular	449	
4	Chapter 667 Congregate	16	
5	Chapters 689 and 167	0	
6	Massachusetts Rental Assistance Program (MRVP)	45	
7	Alternative Housing Voucher Program (AHVP)	0	
8	Federal Conventional Public Housing	39	
9	Section 8 Housing Choice Voucher Program (HCVP)	1186	
10	Section 8 New Construction / Substantial Rehabilitation	0	
11	Section 8 Moderate Rehab	0	
12	Other(s) (Local program(s) Do not count resident service programs such as ABL, FSS or MassLEAP)	0	
13	Other(s) (Local program approved prior to the FY'24.)	0	
14	Other(s) (Local program approved prior to the FY'24.)	0	
15	Total Units	1,946	211

Does the LHA participate in the following programs for LHA-owned c. 200, 705, or 667 units?

14	Supportive Senior Housing Initiative (through the Executive Office of Elder Affairs)	Yes
15	Local Housing Authority Transitional Housing Program (LHATHP)	Yes

Step 2. Full Time Unit-Based Salary

(Auto-calculates)

Maximum Salary from "At Lowest Unit Count in Range"	\$ 151,437
Incremental Units	446
Increment Factor	\$ 27.7
Incremental Salary	\$ 12,358
Full Time Unit-Based Salary Maximum	\$ 163,795

Step 3. Program Factor

(Auto-calculates)

Number of Programs	9
Applicable Program Factor	\$ 14,500

Step 4. Family Factor

(Auto-calculates)

Number of Family Units	211
Applicable Family Factor	\$ 4,500

Step 5. LHA Calculated Salary Maximum (Not to Exceed \$210,516)

(Auto-calculates)

Full Time LHA Calculated Salary Maximum	\$ 182,795
---	------------

*Note: The LHA Calculated Salary Maximum is the maximum annual salary that an executive director may receive, not to exceed **\$210,516**, the Salary Cap for an executive director directly employed by one or two LHAs.*

Step 6. → Salary from Other Sources / Program Activities (Not to Exceed **\$231,567.00)**

*Note: Include here all salary from other program activities, if any (i.e. Management Services Agreements and other contracts with public and private entities that are temporary or otherwise may terminate). Resident service programs such as ABL, FSS, or MassLEAP do not count as Other Program Activities. This amount is the LHA Calculated Salary Maximum plus salary from all other program activities and contracts, and must not exceed **\$231,567.00***

→ Enter Salary from Management Services Agreement Fees (if applicable)

Management Services Agreement #1	\$26,306.00
Management Services Agreement #2	\$0.00
Management Services Agreement #3	\$0.00
Management Services Agreement #4	\$0.00
Management Services Agreement #5	\$0.00

→ Enter Salary from Other Program Activities / Contract Fees (if applicable)

Other Program Activity / Contract #1	\$0.00
Other Program Activity / Contract #2	\$0.00
Other Program Activity / Contract #3	\$0.00
Other Program Activity / Contract #4	\$0.00
Other Program Activity / Contract #5	\$0.00
Other Program Activity / Contract #6	\$0.00
Other Program Activity / Contract #7	\$0.00
Other Program Activity / Contract #8	\$0.00

Full Time LHA Calculated Salary Maximum Including Other Sources	\$ 209,101
---	------------

Owner LHA

→	Marblehead Housing

Source / Description

Step 7.**Board-Approved Salary**

Note: Board-Approved Salary is not to exceed the lesser of the LHA Calculated Salary Maximum or \$210,516.00 for executive directors directly employed by one or two LHAs (see Step 5, above).

For executive directors that also receive salary from Management Services Agreement(s) or from other program activities, the LHA Calculated Salary Maximum plus that additional salary (total salary) may not exceed \$231,567 per year (see Step 6, above).

Exception: if an existing executive director's Current Approved Salary exceeds the maximum in Step 5 or Step 6 above, enter the Current Approved Salary in "Enter Board-Approved Salary" below and check the applicable box. The Current Approved Salary will remain the same until EOHLC publishes a new Salary Schedule and the Current Approved Salary does not exceed the new limits.

Note: Executive Director salary increases must be: absorbed within the LHA's ANUEL as published in the most current EOHLC Budget Guidelines; receive Board approval after the Board considers and carefully analyzes potential short and long-term impacts that a salary increase may have on the LHA's overall operating needs; determines that the increase is reflective of the executive director's performance to-date; is calculated in accordance with this Schedule; and granted only if the LHA is in conformance with applicable guidelines and all other rules and regulations in effect during the executive director's contract term.

Summary

Local Housing Authority:	Salem Housing Authority
Executive Director:	Cathy Hoog
Total Programs:	9
Total Units:	1,946
Full Time LHA Calculated Salary Maximum:	\$ 182,795
Full Time LHA Calculated Salary Maximum Including All Other Sources:	\$ 209,101
Current Approved Salary:	\$ 197,995

→ Enter Board-Approved Salary**\$ 209,101***Use this salary in LHA budget submission to EOHLC***→ For Existing Executive Directors (check applicable box):**

ED is eligible for a salary increase up to the LHA Calculated Salary Maximum

☒

ED is not eligible for a salary increase, and will stay at the Current Approved Salary

☐

Signature of LHA Chairperson: _____

Date: _____

Print Name: _____

Print and submit this signed Executive Director's Salary Calculation Worksheet by email only to the LHA's Housing Management Specialist on or before the EOHLC Budget Submission / Revision Deadline for your LHA.

CERTIFICATE OF FINAL COMPLETION

COMMONWEALTH OF MASSACHUSETTS

EXECUTIVE OFFICE OF HOUSING AND LIVABLE COMMUNITIES

Final Payment

Contractor:	Site Improvements, Inc.	Owner:	Salem	Housing Authority
Street:	45 Christopher Dr	Street:	27 Charter St.	
City, State, Zip:	Methuen, MA, 01844	City, State, Zip:	Salem, MA 01970	
Telephone:	978-682-1030	Telephone:	978-744-4432	
Fax:		Fax:	978-744-9614	
Development No:	200-02	Period Ending:	1/24/2025	
Contract for:	Gateway Cities - walkways, landscaping, play structure	PROJECT No:	258162	

THE PARTIES AGREE THAT THE STATUS OF THE CONTRACT IS AS FOLLOWS:**I. CONTRACT TIME**

- | | |
|---|-------------|
| 1. The Date of Substantial Completion is | 2/8/2024 |
| 2. The Date of Substantial Completion as Amended by Change Order is | 2/10/2024 |
| 3. The Actual Date of Substantial Completion is | 9/27/2024 ✓ |
| 4. Overrun in Contract Time | 230 days |

II. CONTRACT SUM

- | | | | |
|---|----|------------|---|
| 1. The Original Contract Sum is | \$ | 372,731.00 | ✓ |
| 2. The Sum of Approved Change Orders to Date is | \$ | 17,389.53 | ✓ |
| 3. The Adjusted Contract Sum is | \$ | 390,120.53 | ✓ |

LESS:

- | | | | |
|---|----|------------|---|
| 4. Sum of authorized payments to date | \$ | 370,614.50 | ✓ |
| 5. Sum of other claims by Owner | \$ | 0.00 | ✓ |

III. THAT APPLICATION FOR PAYMENT NO. 5 IS DUE \$ PAYABLE IN THE AMOUNT OF \$ 19,506.03 ✓**THE UNDERSIGNED CONTRACTOR HEREBY CERTIFIES THAT:**

- All Work, including work required under change order(s) CO- 0001 has been performed in accordance with the terms of the Contract.
- All changes to the Work (except minor modifications and field adjustments) have been authorized in writing by the Owner.
- All laborers and mechanics have been paid at least the minimum wage rates as set forth in the Contract, and
- There have been no claims made for infringement of any patent.
- By accepting the payment shown in line III above, the Contractor releases the Owner from any and all claims arising under the Contract.

CERTIFIED: CONTRACTOR: Site Improvements, Inc.By: Anthony Finocchiaro Date: 1/31/2025
Authorized General Contractor Representative**CERTIFICATION OF HOUSING AUTHORITY BOARD VOTE****Must be completed by the Owner**The Salem Housing Authority met on _____ And voted to approve this Certificate:
Certified By: _____, Contract Officer**Approved: Architect, Beals and Thomas, Inc.**By: David LaPointe Date: 1/24/2025**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: _____

BDO Project B23-SZ38

Salem Housing Authority

Exterior Siding Window Replacement, 705-3

Client Project #258187

General Bid Log

Date: 02/05/2025 at 12:06PM EST

Page 1 of 2

Bidder	Base Bid	Due Date	Alternates	Final Bid	Status
Drizos Contracting LLC 101 Middlesex Turnpike Ste 6 #353 Burlington, MA 01803	\$278,000.00	02/05/2025 at 12:00PM EST		\$278,000.00	—
MJS Construction Inc 25 Popes LN Danvers, MA 01923	\$278,420.00	02/05/2025 at 12:00PM EST		\$278,420.00	—
New Kappa City Construction Inc 4 Gerald Avenue Millis, MA 02054	\$281,999.00	02/05/2025 at 12:00PM EST		\$281,999.00	—
Serrano & Serrano Construction, Inc 1056 Essex St Lawrence Lawrence, MA 01841	\$300,466.37	02/05/2025 at 12:00PM EST		\$300,466.37	—
Dandis Contracting Inc 1020 Turnpike St #12 Canton, MA 02021	\$308,000.00	02/05/2025 at 12:00PM EST		\$308,000.00	—

BDO Project B23-SZ38
Salem Housing Authority
Exterior Siding Window Replacement, 705-3
Client Project #258187

General Bid Log

Date: 02/05/2025 at 12:06PM EST
Page 2 of 2

Bidder	Base Bid	Due Date	Alternates	Final Bid	Status
TM Construction Management 151 Mystic Ave Medford, MA 02155	\$327,000.00	02/05/2025 at 12:00PM EST		\$327,000.00	—
Aegean Builders LLC 131 Johnson Rd. Winchester, MA 01890	\$337,000.00	02/05/2025 at 12:00PM EST		\$337,000.00	—

February 12, 2025

Dear Members of the Executive Office of Housing and Livable Communities,

It is my great pleasure to submit the grant application for the Self-Sufficiency Program for State-Aided Public Housing and Massachusetts Rental Voucher participants on behalf of the Salem and Marblehead Housing Authority.

Both Salem and Marblehead are committed to supporting the efforts of residents in state-aided public housing to make measurable gains in employment, financial capability and education.

I am confident in both Salem and Marblehead Housing Authorities to carry out the requirements of this program and to support the continuing growth and wellness of our resident populations.

Please feel free to reach out with any additional questions.

Sincerely,

Cathy Hoog

Executive Director

Salem and Marblehead Housing Authority

Salem and Marblehead Housing Authority Self-Sufficiency Program for State-Aided Public Housing and Massachusetts Rental Voucher Program

Grant Application Narrative

The Salem Housing Authority (SHA) owns and operates **715** units of public housing (comprised of ch 200, ch705, ch677, federal public housing), **50** MRVP specialized DHM vouchers and an HCV program of **1,356** vouchers.

Salem is also the management agent for the Marblehead Housing Authority (MHA). The Marblehead Housing Authority owns and operates ch 667, ch 705 and ch 200 programs for a total unit count of **307**. Between the two agencies, Salem manages 40 employees and a total of **2,428 units**. The Salem Housing Authority also has a non-profit instrumentality of the SHA, Housing Opportunities of Salem (HOS), the HOS mission in summary is to create affordable housing opportunities for people in need. In an effort to highlight why Salem and Marblehead are interested and well-suited to develop a plan to implement the State Self Sufficiency Program and the capacity to manage staff, programs and operations, the following examples are provided but are not all inclusive of both agencies operations/programs.

Salem and Marblehead HA's work very closely with our resident populations and strive to provide the best experience for service rich programs to assist our residents. Salem supervises two Resident Services Coordinators (RSC grant positions) for the Salem residents and one Resident Services Coordinator for the Marblehead residents. Salem works closely with our Aging Service Provider, AgeSpan, in partnership on valuable resident programming including a Supportive Living Program at the Charter Street location in Salem, a newly funded Supportive Living Program at the Farrell Court location in Marblehead and a Congregate Housing Program at the Ruane building location in Salem.

Experience with Implementing economic mobility and coaching programs-

The Salem Housing Authority was a recent awardee of the HUD Family Self-Sufficiency (FSS) program in 2022 for a two-year commitment and was recently awarded an additional two years of FSS funding in 2024.

The required number of participants for the Salem Housing Authority to enroll in the FSS program was determined by HUD to be 19 participants per one 30-hour FSS Coordinator position.

Soon after the initial award in 2022, the Salem Housing Authority hired an FSS Coordinator and began marketing the program within the existing SHA voucher program participants and throughout the community. The FSS program currently has 29 enrolled participants with signed contracts. The total program escrow for the participants is \$40,000. In two years time, the program is operating at higher than required service goals.

Salem is excited to highlight a recent award for the EOHLC funded Housing Now program, serving families faced with homelessness. After receiving this award in late 2024, we have already recruited and begun lease ups for the 8 family slots set aside for the program. The family success plans are in motion to ensure stability in the program.

Recruiting participants for programs-

The Salem and Marblehead Housing Authority have extensive experience recruiting residents for participation in programs and service coordination. The final data points, as submitted in the mandated EOHLC annual RSC report for calendar year 2024 for all resident service coordination includes 1,073 residents served by the Salem RSC's and 450 residents served by the Marblehead RSC. The total number (1523 residents) of residents served through the RSC programs indicates a high success rate for recruiting resident participants for programming in 2024.

Experience leveraging outside partners, resources and funds-

Without our outside partners, we could not accomplish all that we do. The partner agencies we work with make it possible for Salem and Marblehead to coordinate services for our participants and carry out the numerous grant programs we have been fortunate to receive. The partnerships we work closely with include: Shriver Job Corps Center, MassHire, Metro PCS Credit Union, The Salem and Marblehead YMCA, AgeSpan, Pathways Family Resource Center, Massachusetts Behavioral Health Partnership, The Salem Pantry, Disability Resource Center, Massachusetts Rehabilitation, Salem Council on Aging, Marblehead Council on Aging, Marblehead Parks and Recreation, Sustainable Marblehead, Driftwood Garden Club, Kelly Anese Wellness, Marblehead Female Humane Society, North Shore Community Development Coalition, Life Bridge, Element Care, North Shore Community Action Program, Mission of Deeds, REACT and our great local Police and Fire Departments.

Salem and Marblehead Demographics-

The current statistical summary/demographics of Salem and Marblehead ch 200 and ch 705 households provide a snap-shot of the age ranges of potential self-sufficiency program participants in these households. Overall, the target age group for focus in this program, ages 18-44 consists of 233 households in Salem and 88 households in Marblehead. These numbers identify a strong pool of potential participants for an SSP program.

Marblehead Demographics

Age of Male Family Members		
Age	Total Members	%
<i>State 200</i>		
0 - 4	12	14.29%
5 - 13	26	30.95%
14 - 17	16	19.05%
18 - 24	17	20.24%
25 - 44	7	8.33%
45 - 59	0	0.00%
60 - 64	2	2.38%
65 - 69	1	1.19%
70 - 74	3	3.57%
75 - 79	0	0.00%
80 & Over	0	0.00%
Total Male Members For State 200:	84	
<i>State 705</i>		
0 - 4	3	25.00%
5 - 13	4	33.33%
14 - 17	1	8.33%
18 - 24	1	8.33%
25 - 44	1	8.33%
45 - 59	2	16.67%
60 - 64	0	0.00%
65 - 69	0	0.00%
70 - 74	0	0.00%
75 - 79	0	0.00%
80 & Over	0	0.00%
Total Male Members For State 705:	12	
Total Male Members:	96	

Age of Female Family Members		
Age	Total Members	%
<i>State 200</i>		
0 - 4	6	4.88%
5 - 13	26	21.14%
14 - 17	6	4.88%
18 - 24	15	12.20%
25 - 44	42	34.15%
45 - 59	23	18.70%
60 - 64	3	2.44%
65 - 69	0	0.00%
70 - 74	2	1.63%
75 - 79	0	0.00%
80 & Over	0	0.00%
Total Female Members For State 200:	123	
<i>State 705</i>		
0 - 4	0	0.00%
5 - 13	3	23.08%
14 - 17	2	15.38%
18 - 24	0	0.00%
25 - 44	5	38.46%
45 - 59	2	15.38%
60 - 64	1	7.69%
65 - 69	0	0.00%
70 - 74	0	0.00%
75 - 79	0	0.00%
80 & Over	0	0.00%
Total Female Members For State 705:	13	
Total Female Members:	136	

Salem Demographics

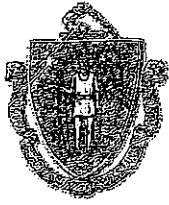
Age of Male Family Members			Age of Female Family Members		
Age	Total Members	%	Age	Total Members	%
<i>State 705</i>			<i>State 705</i>		
0 - 4	9	21.43%	0 - 4	2	2.90%
5 - 13	9	21.43%	5 - 13	11	15.94%
14 - 17	5	11.90%	14 - 17	1	1.45%
18 - 24	8	19.05%	18 - 24	9	13.04%
25 - 44	6	14.29%	25 - 44	19	27.54%
45 - 59	2	4.76%	45 - 59	13	18.84%
60 - 64	0	0.00%	60 - 64	7	10.14%
65 - 69	2	4.76%	65 - 69	2	2.90%
70 - 74	1	2.38%	70 - 74	2	2.90%
75 - 79	0	0.00%	75 - 79	2	2.90%
80 & Over	0	0.00%	80 & Over	1	1.45%
Total Male Members For State 705:	42		Total Female Members For State 705:	69	
<i>State 200</i>			<i>State 200</i>		
0 - 4	22	13.17%	0 - 4	15	5.00%
5 - 13	54	32.34%	5 - 13	56	18.67%
14 - 17	19	11.38%	14 - 17	23	7.67%
18 - 24	32	19.16%	18 - 24	42	14.00%
25 - 44	19	11.38%	25 - 44	98	32.67%
45 - 59	12	7.19%	45 - 59	41	13.67%
60 - 64	4	2.40%	60 - 64	6	2.00%
65 - 69	1	0.60%	65 - 69	7	2.33%
70 - 74	2	1.20%	70 - 74	3	1.00%
75 - 79	1	0.60%	75 - 79	6	2.00%
80 & Over	1	0.60%	80 & Over	3	1.00%
Total Male Members For State 200:	167		Total Female Members For State 200:	300	
Total Male Members:	209		Total Female Members:	369	

Capacity to Measure Metrics-

SHA and MHA have strongly indicated ability to measure metrics in service programs as evidenced by the continuation of funding awards for the HUD Family Self Sufficiency grant, the newly funded Housing Now grant and the Resident Services Coordinator grants. Salem is also a proud recipient of Community Preservation grant funding, CDBG grant funding, Marblehead Female Humane Funding, Action, Inc funding, HILAP funding, targeted EOHLC funding for modernization programs, public housing innovations funding, Mass Housing Partnership funding, creative placemaking funding. All of the grant funding listed requires that our agencies track metrics, expenses and outcomes. The agencies' capacity to measure metrics is evidenced by continued funding awards, as each of these grant programs require extensive metric reporting.

Staff Qualifications-

The Executive Director of Salem and Marblehead, Cathy Hoog, LMHC, LMFT has extensive experience in the housing industry and resident services. Cathy is a Licensed Mental Health Clinician, a Licensed Marriage and Family Therapist and has extensive experience and training with community services programs. Cathy Hoog will supervise the Self-Sufficiency Coordinator for this program once hired and will ensure the Coordinator receives adequate supervision to provide families served will receive motivational services to develop SMART (specific, measurable, achievable, relevant and time-bound) goals for Individualized Goal Plans.



Commonwealth of Massachusetts
**EXECUTIVE OFFICE OF HOUSING &
LIVABLE COMMUNITIES**

Maura T. Healey, Governor ♦ Kimberley Driscoll, Lieutenant Governor ♦ Edward M. Augustus Jr., Secretary

PHN 2025-01

To: Local Housing Authority (LHA) Executive Directors
From: Fatima Razzaq, Director, Bureau of Housing Development and Construction
Date: January 9, 2025
Re: Vacant Unit Turnover Task Force

PROGRAM OVERVIEW

The Executive Office of Housing and Livable Communities (EOHLC) is seeking proposals from qualified Local Housing Authorities (LHAs) interested in forming and hosting a Vacant Unit Turnover Task Force (Task Force). The Task Force will assist neighboring LHAs with routine vacant unit turnovers and small-scale associated capital work.

The following is a listing of the minimum anticipated scope of services. EOHLC may elect to modify or redefine the scope of services as needed to ensure compliance with federal statutes, regulations, and other policies and requirements. EOHLC may also negotiate and execute contract amendments with the awarded Respondent which EOHLC reasonably determines are within the scope of this NOFA and necessary to result in best value to the Commonwealth.

This program is funded through the FY25 Public Housing Operating Budget and will be delivered to awarded LHAs via a budget exemption.

PROGRAM DESCRIPTION

This NOFA seeks to award no more than two host LHAs to pilot the Task Force for a period of approximately one (1) year, unless the contracts are extended, suspended, or terminated. EOHLC reserves the right to extend the contract for up to four (4) one-year options to extend, for a total potential contract length of five (5) years, if all options are exercised. These may be exercised at EOHLC's sole option and are subject to the availability of funding and satisfactory performance by the selected Respondent. EOHLC may also combine the one year contract renewal terms.

If, over the term of the contract(s), EOHLC determines that additional Respondents should be awarded, these may be drawn from the pool of Respondents who submitted applications in response to the NOFA and were not awarded contracts.

It is anticipated that EOHLC will review the program at the 6 and 12 months mark, and if successful, EOHLC may elect to issue a follow-up procurement for one or more additional Task Force LHA hosts.

The Task Force will provide vacant unit turnover services to neighboring LHAs as well as small-scale associated capital work¹ and potentially tenant selection assistance² for reoccupying the subject units. Due to the force account and routine nature of this work, there is no expectation for design services to inform turnovers.

LHAs are expected to engage on an LHA to LHA level, without EOHLC coordination. EOHLC will provide general program oversight, and may provide additional clarifications and instructions.

EOHLC will fund staffing and travel costs of the Task Force, but participating LHAs will pay for services received by the Task Force, including materials and contracts costs, either through operating funding or capital funding depending on the size and scope of the work required.

Host LHAs are expected to provide EOHLC with monthly reporting including: LHAs served, number of units turned over, general scopes, and costs and dates of re-occupancy.³ Hosts will work collaboratively with EOHLC on the process and program implementation, with the Director of Capital Planning serving as the main point of contact.

LHAs using services are expected to service the “normal flow” of vacant unit turnovers with their own staff, resorting to using the Task Force when the LHA has a spike in vacancies, especially difficult vacancies, or experiences a temporary loss of critical LHA staff. The exact division of labor will be developed, in accordance with any guidance or instructions that EOHLC may provide, over the course of the pilot.

FUNDING

Up to approximately \$500,000 may be awarded annually to the selected host LHAs to cover the costs of hiring staff dedicated to this initiative. Funding may be used for salaries, training, equipment and related operational expenses. Up to 5% may be taken as an administrative fee by the host LHA.

A host LHA Board, at its discretion, may devote a portion of the 5% administrative fee to the Executive Director Salary, in accordance with the EOHLC LHA Executive Director Salary and Qualifications Schedule.

ELIGIBILITY CRITERIA

Eligible Respondents must meet the following threshold eligibility criteria:

1. Be a Massachusetts LHA with a state-aided public housing portfolio;
2. Have zero (0) Performance Management Review (PMR) or Agreed Upon Procedures (AUP) “strikes” within the last three (3) years; and
3. Have the capacity to manage and hire staff for this initiative.

¹ i.e. Work that does not include major building components such as HVAC, roofing or structural elements and can be accomplished through force account or service contracts.

² This could entail support with mailings, review of eligibility and qualifications, and offer letters.

PROPOSAL REQUIREMENTS

Interested Respondents should submit the following materials via email to EOHLCPublicHousing@mass.gov by **5pm on Friday February 28, 2025**.

1. **Agency Overview:** Description of the LHA, including size and relevant experience.
2. **Proposal:** This should include a detailed strategy for forming and implementing a Task Force, an outline of strategies to improve vacant unit turnover rates, and any innovative approaches that may be deployed. This should include estimated number of LHAs covered, approximate radius of travel, and expected number of vacant units addressed on an annual basis.
3. **Proposed Staff Plan:** Details of the staffing plan, including roles, responsibilities, and qualifications. This should include a listing of potential service contracts if those are proposed.
4. **Collaboration Plan:** Description of how the LHA will collaborate with neighboring LHAs, including a description of outreach, intake, coordinating, documentation, quality assurance and invoicing.
5. **Budget:** Detailed budget outlining annual cost of program, not to exceed maximum of \$500,000 unless supplemented by non-EOHLC funds.
6. **Timeline:** Proposed timeline for implementation of the Task Force.
7. **Board approval:** Submit LHA Board meeting minutes denoting an approval of this application.

EVALUATION CRITERIA

Proposals will be evaluated based on the following criteria:

1. Feasibility and clarity of the proposed strategies (30%)
2. Experience and assessed capacity of the LHA (25%)
3. Feasibility of collaboration approach (25%)
4. Feasibility of the budget and timeline (20%)

EOHLC reserves the right to use other available information regarding a Respondent's proposal when evaluating proposals.

QUESTIONS

[A webinar](#) for interested parties will be held on Wednesday January 22, 2025 at 11am. A Q&A document will be prepared and published following the webinar.

Questions may be submitted in writing to EOHLCPublicHousing@mass.gov by the same date. Answers will be published on COMMBUYS and as an addendum to this PHN.

Salem Housing Authority Proposal for Regional Vacant Unit Task Force

I. Agency Overview

The Salem Housing Authority (SHA) owns and operates **715** units of public housing (comprised of ch 200, ch705, ch677, federal public housing), **50** MRVP specialized DHM vouchers and an HCV program of **1,356** vouchers.

Salem is also the management agent for the Marblehead Housing Authority (MHA). The unit count for MHA consists of ch 667, ch 705 and ch 200 programs for a total unit count of **307**. Between the two agencies, Salem manages 40 employees and a total of **2,428 units**. The Salem Housing Authority also has a non-profit instrumentality of the SHA, Housing Opportunities of Salem (HOS), the HOS mission in summary is to create affordable housing opportunities for people in need. In an effort to highlight Salem's capacity to manage staff, programs and operations, the following examples are provided but are not all inclusive of Salem's operations/programs.

Salem works very closely with our resident populations and strives to provide the best experience for service rich programs to assist our populations. Salem supervises two Resident Services Coordinators (RSC grant positions) for the Salem residents and one Resident Services Coordinator for the Marblehead residents. Salem works closely with our Aging Service Provider, AgeSpan, in partnership on valuable resident programming including a Supportive Living Program at the Charter Street location in Salem, a newly funded Supportive Living Program at the Farrell Court location in Marblehead and a Congregate Housing Program at the Ruane building location in Salem.

Salem is also a proud recipient of the HUD funded Family Self Sufficiency program, which serves our voucher participants offering goal oriented specialized supportive services from the Family Self Sufficiency Coordinator along with the opportunity to escrow monies into savings. The required enrollment for the program has been surpassed and participants are thriving and saving money for their future.

Thanks to EOHLC support and many additional funding supporters, Salem has proudly recently closed on a redevelopment project in partnership with Beacon Communities. The project phases of design and permitting involved a community engagement process that took several years. Salem worked side by side with Beacon Communities throughout the various stages involving our residents, political leaders and local constituents every step of the way. Salem worked in conjunction with service providers to ensure our residents were relocated safely with dignity and in consideration of all their needs. We continue to monitor the relocated residents, managing their rental accounts and ensuring they are kept abreast of the status of the project. Our team remains in partnership with Beacon and the Contractor team as the project construction is underway. We are working closely with the team to advertise and promote employment for our residents, encouraging tenant hires on the construction team. SHA's non-profit, Housing Opportunities of Salem, received development fees and will soon participate in profit sharing as part of this project, carving the way for HOS to begin much needed work affordable housing development work in the community. The span of this project was four years and resulted in newly reimagined housing and increased the number of units from 50 to 124.

With Salem's oversight, Marblehead Housing Authority recently issued an RFP for redevelopment of the ch 200 Broughton Road. This has resulted in a developer designation with Winn Companies and the terms of a redevelopment project involving significant rehabilitation and creation of new affordable housing units is underway. Upon receiving the management services agreement in Marblehead, the agency was struggling to maintain efficient maintenance operations and was riddled with major modernization needs and excessive vacancies. The latest Performance Management Reviews for MHA reveal high scores with no findings and low vacancy rates with efficient unit turnover rates.

Salem has had the pleasure of supporting our neighboring agencies in different capacities. SHA currently has an interagency agreement with Swampscott Housing Authority in an effort to assist the agency with various operational needs. Over the past two years, we have helped Swampscott as needed in the area of maintenance operations support, lease ups, list pulls and general administrative support for the agency. We have recently been

approached by the Topsfield Housing Authority for similar needs and are open to assisting our colleagues there as well.

Salem had the pleasure of participating in the pilot state-wide vacancy initiative last year which resulted in providing vacancy turnover assistance along with re-occupancy/champ waitlist pull assistance for both Essex and Manchester by the Sea Housing Authorities. Our work with these agencies using existing Salem staff resulted in 14 long term vacancy turnovers and re-occupancy assistance with two additional in unit repairs.

Salem's modernization program typically consists of an average project stack of 14 projects per year in construction or awaiting design approvals. The average annual modernization expenditures totals in the range of \$2-10 million (depending on the projects in the year). The oversight of Marblehead Housing Authority's annual modernization typically involves an average of 3-4 major modernization projects annually for an average expenditure total of \$300,000 to \$1.2 million (depending on the projects in the year).

II. Proposal

SHA's taskforce proposal includes comprehensive evaluation components, a service plan for each unit with cost estimate/time estimate along with services to complete the tenant selection process through waitlist pulls as according to the agency determined need.

The evaluation process includes use of a trained HQS/NSPIRE Housing Inspector to determine the needs of the vacancy with a written inspection plan and details of the vacancy turnover plan which will include in house services and what utilization if any, of service contractors. The plan will also include a cost estimate outlining the anticipated timing of turnover.

This evaluative process will include a teaching/training component for the receiving agency by incorporating any identified staff the agency would like to use as part of the evaluation/turnover process so that there is more likelihood that the existing staff (if applies) could be successful in future maintenance operational needs. The type of instruction includes sharing best practices

use of vacancy logs, process for tracking, inspection services and process for tracking/repairs during inspections, work order creation/tracking and coordinating turnover work based on regular need/inventory assessment. We believe in not only supporting our colleagues but teaching them best practices as well so that they have the tools to ideally carry out future work. SHA will provide each agency served with a Memorandum of Understanding outlining the services agreed on by the Vacancy Task Force along with the timing and cost estimates.

Salem has advertised for service contracts considering the possibility of being selected for this task force. The not to exceed limits for Plumbing Services Contract, Electrical Services Contract, Painting Contract and Flooring Replacement Contract have been considered for the work anticipated in our region and advertised as such.

The SHA Vacancy Task Force team will be deployed ideally within a 50 mile radius of Salem, Massachusetts and could likely include approximately 43 agencies in Essex and Middlesex Counties. With roughly 12,400 units in Essex County and the Eastern part of Middlesex County and an average vacancy turnover rate of 7%, we could assume a rough estimate of 868 unit turnovers occur for this region in a year.

III. Staffing Plan

The staffing plan can be modified as determined by need and further evaluation through the PILOT phase but our initial plan is anticipated as follows:

Executive Director, responsible for high level oversight and administration of the program along with communications and reporting to EOHLC, implementation of the initial interagency services Memorandum of Understanding agreements and ongoing satisfaction surveying. Will participate in the initial set up and organization of the program including staff hiring along with the Task Force Team – Cathy Hoog. (see resume)

Maintenance Operations Director, (existing staff) responsible for front line program oversight and administration including assignments for each

agency/participation in initial coordination with the receiving agency and determining assignments, timing, use of resources and tracking costs, billing receiving and ensuring communication with the receiving agency. Will also head the hiring of staff for the program and the initial purchase of equipment needed for the program – Gary Dean. (see resume)

Facilities and Operations Manager, (existing staff) will perform initial inspections of vacant units and supervise on sight staff/contractor work from start to finish of vacancy assuring the plan for the vacancy(ies) and training is followed according to timeline – Luis Lopez (see resume)

Administrative Training/Support Staff (to be hired)

One full-time Administrative Staff professional will handle the processing of initial coordination of paperwork, maintenance request tracking including coordination of vacancy work order tracking with receiving agency, and the administration of the CHAMP Housing Waitlist pulls. This role ensures that all maintenance activities are documented, follow-ups are conducted efficiently, and any needs from the housing waitlist are integrated into the unit turnover process. This position will also play a key role in tracking the overall key outcomes of the program for efficiency/quality assurance and timing ensuring accurate detailed reporting to EOHLC. See attached Job Description for Administrative Training/Support Staff qualifications.

Maintenance Turnover Staff (3 - to be hired)

Three full-time maintenance staff will be responsible for inspection services, performing all repairs and cleaning for unit turnovers. Their responsibilities will include handling plumbing, electrical, HVAC, and carpentry tasks, as well as ensuring that units are properly prepared for incoming tenants. These individuals will work under the direction of the Maintenance Operations Director and the Facility Operations Manager to meet all determined goals for the receiving agency. See attached Job Descriptions for Turnover Maintenance Staff qualifications.

IV. Collaboration Plan

SHA will utilize our current website for advertisement along with the ED listserves for advertising the Vacancy Task Force Services. We will work in

conjunction with EOHLC, Regional RCATs and any of our advocating partners (MaNahro, for example) to share information on services offered through the Vacancy Task Force. The SHA Vacancy Task Force Memorandum of Understanding for each agency will outline the following service expectations to be agreed on (or declined):

Vacant Units to be turned over and detailed scope of work for each unit

Waitlist pull services to be provided

Training components to be provided

Timeline for service

Expectations for quality assurance monitoring

Expectations for invoicing and detailed cost estimates

SHA will utilize a series of intake forms including the following:

Memorandum Of Understanding, Inspection Report, Needs Assessment per unit with **Cost Estimate** per unit, **Cost Estimate for Additional Services** and **Billing Invoices**. Any EOHLC required tracking forms or online reporting will also be incorporated.

V. Budget

Tools and Supplies	\$20,000
Maintenance Turnover Staff	\$255,000
Administrative Support Staff	\$74,000
Administrative Fees	\$35,000
Vehicle /Equipment	\$60,000
Contingencies/overages	\$56,000
Total	\$500,000

VI. Timeline for Implementation

Hiring and on-boarding of new staff members along with advertisement of Task Force Services-30-45 days

Acquisition of vehicle/supplies and tools-30-45 days

Administrative Organization of Agreements/Tracking Tools/Reports-30 days

VII Board Approval

See attached Board vote.

Gary Dean

9 Landau Lane
Merrimac, MA 01860
gdean@salemha.org
978-430-3531

Summary:

- 17 years of experience working for housing authorities with 10 years leading teams
- Currently supervising a team of Sixteen as Director of Maintenance
- Certified as a Public Housing Manager and Massachusetts Maintenance Supervisor
- Deep knowledge of local, state, and federal regulations related to public housing
- Extremely resourceful, with a large network of housing contacts and specialists
- Bachelor's degree in communication, strong foundation in written and verbal skills
- Enthusiastic public speaker, able to convey ideas and information easily and clearly
- Confident and creative thinker with a proven track record of producing quality results
- Dependable team player capable of entering diverse situations with professionalism
- Leads by example, with a firm belief that honesty is always the best policy

Certifications & Skills:

- Housing Certifications: NAHRO MPHA Certified
MAHAMS MMS Certified
Lead Paint Removal Certified
OSHA 10
REAC Inspection Certified
UPCS Inspection Certified
NSPIRE Inspection Certified
- Certifications: USDOT/NHTSA first responder
Automated External Defibrillator (AED)
Cardiopulmonary Resuscitation (CPR)
Massachusetts Fire Academy Call/Vol 2010
- Computer/Software: PHA-web, HAFIS, CAP-Hub, CPS, Microsoft Office Suite,
Proficient in Windows and Mac environments
- Grants and Initiatives **2016** – Ipswich Housing ModPhase Grant recipient
2017 – Lean Program Agawam Village Boiler
Replacement and energy efficiency initiative
2020 – Leefort Terrace redevelopment – Salem MA
2023-24 – EOHLC Vacancy Initiative – Manchester HA
and Essex HA
2022 – Lean Program Rainbow Terrace Boiler
Replacement and energy efficiency initiative
2023 – Lean Program Broughton Road Boiler
Replacement and energy efficiency initiative

Relevant Work Experience:

Director of Maintenance (2020 -present)

Salem Housing Authority (Salem, MA)

Marblehead Housing Authority (Marblehead, MA)

- Manages sixteen employees and the maintenance and facility programs for the Salem and Marblehead Housing Authorities. Responsible for over 1050 state and federal units over 32 properties.
- Leads, directs, and troubleshoots the daily operations of the maintenance departments and oversees all phases of project management including all modernization work.
- Develops procedures for preventative maintenance and participates in the annual modernization planning cycle.
- Assists with Local, State, and Federal program audits in coordination with the Executive Director, Department of Housing and Community Development (DHCD / EOHLC), Real Estate Assessment Center (REAC + NSPIRE) Inspections, the Public Housing Management Assessment Program (PHMAP), and independent audits related to maintenance operations.
- Oversees vendor and service contractor activities related to scheduling and work progress to ensure high-quality of work and accurate invoicing.
- Inspects buildings and grounds and establishes strong relationships with residents.
- Develops a positive work culture by providing clear goals and expectations, delivering corrective measures when needed, and processing employee grievances when required.
- Creating and closing of work orders, keeping an organized filing system, ordering all materials and supplies, updating and maintaining an asset inventory system, and keeping a good working relationship with multiple vendors, federal, state, and town employees and officials.
- On call 24/7/365

Director of Maintenance & Modernization (2015-2020)

Ipswich Housing Authority (Ipswich, MA)

Hamilton Housing Authority (Hamilton, MA)

Salisbury Housing Authority (Salisbury, MA)

- Manages seven employees and the maintenance and modernization programs for the Ipswich, Hamilton, and Salisbury Housing Authorities. Responsible for 352 state and federal elderly/disabled units, 43 state and federal family units, 52 Section 8 Vouchers.
- Leads, directs, and troubleshoots the daily operations of the maintenance departments and oversees all phases of project management. Develops procedures for preventative maintenance and participates in the annual modernization planning cycle.
- Assists with Local, State, and Federal program audits in coordination with the Executive Director, Department of Housing and Community Development (DHCD), Real Estate Assessment Center (REAC) Inspections, the Public Housing Management Assessment Program (PHMAP), and independent audits related to maintenance operations.
- Oversees vendor and service contractor activities related to scheduling and work progress to ensure high-quality of work and accurate invoicing.
- Creating and closing of work orders, keeping an organized filing system, ordering all materials and supplies, updating and maintaining an asset inventory system, and keeping a good working relationship with multiple vendors, federal, state, and town employees and officials.
- Inspects buildings and grounds and establishes strong relationships with residents.

- Develops a positive work culture by providing clear goals and expectations, delivering corrective measures when needed, and processing employee grievances when required.
- On call 24/7/365

Maintenance Supervisor (2014-2015)

Topsfield Housing Authority (Topsfield, MA)

- Was responsible for all phases of building, grounds, mechanical system, and equipment maintenance for 80 public housing units, including all unit and building inspections.
- Supervised one employee. Administrative duties included the creation and closing of work orders, keeping an organized filing system, ordering all materials and supplies, updating and maintaining an asset inventory system, and keeping a good working relationship with multiple vendors, federal, state, and town employees and officials.
- Partnered with Executive Director in selecting maintenance projects, modernization projects, and CIP projects, following projects from start-to-finish.
- On call 24/7/365

Maintenance Supervisor (2010-2014)

West Newbury Housing Authority (West Newbury, MA)

- Repaired and maintained machines, mechanical equipment, and buildings for 32 units.
- Worked on variety of tasks including unit turnovers, plumbing, electrical, HVAC, plaster and drywall, roofing, windows, doors, floors, and woodwork. Manicured lawns and gardens and maintained all properties, season-to-season, including snow removal in the winter.
- On call 24/7/365.

Maintenance Mechanic (2010-2014)

Wakefield Housing Authority (Wakefield, MA)

- Performed a variety of maintenance and repair tasks on the facilities and equipment, vacant unit turnovers, including routine repairs to electrical, plumbing, kitchen and bath, heating and air conditioning. Completed rough and finish carpentry work and detailed lock repair.
- On call 1 week per month.

Maintenance Laborer (2007-2010)

Ipswich Housing Authority (Ipswich, MA)

- Hired for a temporary period to help turn over federally funded vacant units, working in direct relationship with DHCD (EOHLC) .

Education:

- Emerson College Bachelor of Science in Mass Communication (1996)

Luis Lopez
33 Nelson Ave.
Beverly, MA 01915
978-726-6265
llopez@salemha.org

Summary:

- Punctual and Reliable. Honest. Hardworking.
- Current Public Housing Employee.
- Dependable team player. Excellent organizational skills.
- Capable of entering diverse situations with professionalism and courtesy.
- Possesses firsthand knowledge of running a business.
- Fast learner, able to convey and receive ideas and information easily and clearly.
- Confident thinker and problem solver. Able to produce solid, positive results.

Education:

Lino Padron Rivera HS – Puerto Rico

Skills:

Computer:	Proficient in both PC and Mac environments
Microsoft Office Suite:	Word, Works, Outlook,
Software Experience:	Internet Explorer, Firefox, PHA- Web

Experience:

2022 -

Facilities and Operations Manager

Salem Housing Authority (Salem, MA)

Marblehead Housing Authority (Marblehead, MA)

- Helps the Director of Maintenance manage 16 employees and the maintenance and operations programs for both HA's.
- Helps the Director of Maintenance to lead, direct, and troubleshoot the daily operations of the maintenance departments and oversees all phases of public housing inspections and public housing vacancies. Develops procedures for preventative maintenance and participates in the annual modernization planning cycle.
- Assists with Local, State, and Federal program audits in coordination with the Maintenance Director, Executive Director, Department of Housing and Community Development (DHCD), Real Estate Assessment Center (REAC + NSPIRE) Inspections, the Public Housing Management Assessment Program (PHMAP), and independent audits related to maintenance operations.
- Helps to oversee vendor activities related to scheduling and work progress to ensure high-quality of work and accurate invoicing.
- Inspects buildings and grounds and establishes strong relationships with residents.
- Helps to maintain a positive work culture by carrying out the clear goals and expectations of the ED and DoM, delivering corrective measures when needed, and processing employee grievances when required.
- On call 24/7/365
- On Call for Snow Removal

2016 - 2022

Public Housing Inspector / Maintenance Liaison

Salem Housing Authority (Salem, MA)

Marblehead Housing Authority (Marblehead, MA)

- Oversees all aspects of public housing inspections for both HA's • Supervise onsite personnel • Maintain high standards of workmanship that adhere to original plans and specifications • Ability to oversee multiple jobs and continue to be productive • Interact with clients and make sure they are happy with the service • Working both individually and as a team to accomplish the tasks at hand. Master of PHA-Web for creating work orders and keeping admin paperwork correct and up to date.
- On Call for Snow Removal

2008 - 2016

Crew Chief

Air Tight Insulation (Middleton, MA)

- Responsible for all phases of this insulation business, including mechanical system and equipment maintenance. Administrative duties included documenting work and creating work orders, billing, scheduling, ordering all materials and supplies, updating and maintaining tools and assets, and keeping a good working relationship with multiple vendors, and all clients. Working both individually and leading a crew to accomplish the tasks at hand.

Cathy Hoog, LMHC, LMFT

128 High Street Unit 1 Ipswich, MA 01938

(781) 727-5900

EDUCATION Cambridge College, Cambridge, Massachusetts
Masters of Education-Counseling Psychology-Received-2001

University of South Florida, Tampa, Florida
Bachelor of Arts-Psychology- Received-1995

LMHC License #7618
LMFT License #1350
PHM-Certified Public Housing Manager-NAHRO

PROFESSIONAL AFFILIATIONS

New England Regional NAHRO
Massachusetts NAHRO
National NAHRO
North Shore Executive Director's Association
Section 8 Administrators Association

COMMITTEE POSITIONS

EOHLC-Housing Committee
National NAHRO-Professional Development Committee
Massachusetts NAHRO-Professional Development Committee
New England Regional NAHRO-Legislative Committee

EXPERIENCE

9/2019 to Present The Salem Housing Authority, Salem, MA
9/2021 to Present The Marblehead Housing Authority, Marblehead, MA
1/2023 to Present Housing Opportunities of Salem, Salem, MA

Executive Director/President.....

Direct all aspects of multi-site federal and state large public housing authority in addition to the oversight of Management Services Agreement with the medium public housing authority, Marblehead Housing Authority. Both agencies serve a total of 1021 public housing units. Oversight also includes the Salem Housing Authority federal section 8 voucher program with a voucher authority of 1,355 vouchers and the state MRVP/DMH voucher program. Oversee all fiduciary responsibilities of both authorities including accounts payables, receivables, payroll, federal grant programs, other income and operating subsidies. Oversee the Maintenance of all aspects of the physical properties, building systems and maintenance. Oversee all procurement, construction and modernization of properties, ensuring all programs and processes are in compliance with state and federal regulations. Monitor all activities and programs related to residents, the safety, and the wellbeing of the residents. Work closely with resident tenant organizations on policy and operations. Maintain all records including state and federal reporting requirements and all regulatory compliance requirements. Manage/supervise Department head positions and any contractors, projects or additional temporary staffing. Organize and maintain records for monthly Board of Commissioner meetings for both Boards at each agency and ensure the proper development and Maintenance of all required and necessary policy pertaining to public housing, residents and employment. Maintain/enhance relationships/partnerships with elected officials and stakeholders in the community. Research, write and submit grant opportunities for resident programming and additional funding for operational needs. Play key role in reviewing opportunities for further affordable housing development/re-development. As President, oversee Housing

Opportunities of Salem (HOS), a non-profit instrumentality of the Salem Housing Authority, newly formed in 2023. The mission of HOS is to develop and support affordable housing opportunities and carry on management responsibilities of affordable housing projects.

Public/private redevelopment projects include:

Redevelopment of Leefort Terrace, Salem, MA- \$90 million redevelopment of a 50 unit 667 state public housing development through partnership with Beacon Communities to 124 unit total affordable passive-house design development. Project closed June 2024.

Redevelopment of Broughton Road, Marblehead, MA- RFP issued in December 2023 for Development partnerships. Winn Companies was designated October 2024. Community process and design/development to begin December 2024. Conceptual designs submitted include a \$65 million dollar redevelopment.

2020 to Present **Presenter.....**Massachusetts Chapter NAHRO, New England Regional NAHRO, National NAHRO, Section 8 Administrators Association, MAHAMS
Present in person and online webinars to members on various subject matters as needs are determined by membership including but not limited to: Mental Health Conditions, Trauma Informed Care, Resident Services, Legal Elements, Maintenance Operations, Dealing with Difficult People, De-Escalation Strategies, Managing Staff Mental Health and Health and Wellness Programs in the Industry. Presentations offered to various industry providers and colleagues as well.

3/2015 to 8/2019 **The North Andover Housing Authority, North Andover, MA**

Executive Director.....

Direct all aspects of multi-site federal and state public housing authority. Manage all fiduciary responsibilities of the authority including accounts payables, receivables, payroll, federal grant programs and operating subsidies. Manage all aspects of the physical properties, building systems and maintenance staff. Oversee all construction and modernization of NAHA properties, ensuring the process compliance with state and federal regulations. Monitor all activities and programs related to residents, the safety, and the wellbeing of the residents. Maintain all records including state and federal reporting requirements and any other federal regulatory compliance requirements. Manage/supervise staff positions and any contractors, projects or additional temporary staffing. Organize and maintain records for monthly Board of Commissioner meetings and ensure the proper development and Maintenance of all required and necessary policy pertaining to public housing, residents and employment. Maintain/enhance relationships/partnerships with elected officials and stakeholders in the community.

4/2012 to 3/2015 **The Edinburg Center, Lexington, MA CBFS Program**

Assistant Clinical Director.....Direct Community Based Flexible Support Program funded by the Department of Mental Health. Monitor the daily activity of contract that provides service coordination to population in Metro West Suburb area of Massachusetts. Supervise multi-disciplinary team (100 staff), Directors, Maintenance and Residential Service Directors that run five Residential Treatment Programs as part of the contract. Oversee contracted housing subsidies and process of re-certification/licensing/inspections. Oversee Nursing and Health and Wellness services related to the contract. Responsibilities include program development, contract monitoring, productivity monitoring, budget monitoring, staff development, staff training and orientation. Conceptualize, develop and implement administrative systems and processes in the contract. Position ensures compliance with DMH, DPH, DPPC and DCF regulations/reporting requirements. Position required regular written and oral reports of status of contract to agency Leadership and the Department of Mental Health.

Development meetings include risk management, staff recruitment/retention and quality improvement initiatives. Overseeing QI plans and data collection/reporting also a key role in this position.

7/2009 to 7/2011 **Eliot Community Human Services, Lynn, MA CBFS Program**

Clinical Supervisor.....Supervise multi-disciplinary Clinical team and clinical treatment of clients referred by the Department of Mental Health. Provide regular oral and written reports related to the status of treatment in relation to the contract and services. Extensive clinical documentation, treatment planning and risk management/crisis planning. Provide staff supervision and staff training and ongoing staffing evaluations. Monitor overall contract requirements and regularly assess regulatory compliance. Attend routine case conferences and community meetings for coordination of care and treatment. Maintain referrals to clinical/medical providers in community and regularly attend community meetings to maintain relationships with key stakeholders in community in relation to care and treatment of clients served in the contract.

6/09 to present **Private Practice, North Andover, MA**

Clinician/Consultant....Provide individual, couples and family counseling in a telehealth private practice. Responsible for all data and documentation necessary to bill third-party Insurance companies requiring medical necessity and for assessing needs via required third-party assessment tools.

4/02 to 6/09 **DCS Mental Health, Medford, Massachusetts**

Staff Clinician....Provide individual, couples, and family counseling for an outpatient mental health clinic and psychotherapy for elders in multiple nursing home settings. Responsible for coordination of social services for clients in nursing facilities. Utilize multiple modalities of treatment and coordinate care with all medical providers working in conjunction with cases. Responsible for all data and documentation necessary to bill third-party insurance companies and for assessing needs via required third-party assessment tools.

6/04 to 10/07 **Groveland Housing Authority, Groveland, Massachusetts**

Executive Director

Essex Housing Authority, Essex, Massachusetts (2006)

Executive Director

...Direct all aspects of multi-site federal and state public housing authorities. Manage all budgetary aspects of the authorities including accounts payables, receivables, payroll, federal grant programs and operating subsidies. Oversee all construction/modernization of all GHA/EHA properties to ensure compliance with state and federal regulations. Manage all aspects of the physical properties, building systems and maintenance staff. Monitor all activities and programs related to the diverse population of residents, the safety, and the wellbeing of the residents. Maintain all records including state and federal reporting requirements and any other federal regulatory compliance requirements. Manage office staff positions and any contractors, projects or additional staffing. Organize and maintain records for monthly Board of Commissioner meetings and ensure the proper development and Maintenance of all required and necessary policy pertaining to public housing, residents and employment.

9/97 to 9/03 **The Somerville Housing Authority, Somerville, Massachusetts**

Director of Resident Services...Direct social service program for twelve residential buildings serving thousands of residents. Advocate on behalf of diverse residents of the Somerville Housing Authority through facilitating training and program development. Other responsibilities included but were not limited to: Intervention strategizing, facilitating meetings/seminars, extensive individual and group counseling, monitoring of

all resident associations and elections to ensure compliance with federal & state regulations, produce/edit company newsletter, grant writing and funding source researching, implementation of project management, and promotion of resident participation in any/all modernization projects/new construction projects. Position also entailed: monitoring relationships and budgets of all business partnerships, participation in business partner meetings, and on-going web site development. Education and prevention coordination for residents and staff included workshops, orientation training, and classroom instruction. Included supervision of all resident services staff positions/interns and supervision of community activities center and staff.

REFERENCES

Available Upon Request

HOUSING ADMINISTRATIVE COORDINATOR

As a key member of the Administrative team, this position is intended for a highly organized, motivated individual with good interpersonal skills.

The Housing Administrative Coordinator will interpret and implement all regulatory reporting requirements pertaining to housing maintenance programs, any vacancy task force documentation requirements and tenant selection programs.

The position entails regular use of a computer and basic office skills including filing, organizing, managing incoming phone calls and coordinating scheduling.

This position will manage aspects of the housing application process and online housing application programs (CHAMP) including pulling waitlists and initiating verification packages.

The position will require managing data and compiling reports for submission and regular review.

Position will require participation in Maintenance and Public Housing Meetings and regular communication with the team.

Training and use of housing specific software and statewide housing application waitlists is necessary.

The position will include periodic instruction/training to others for use of software systems and maintenance related software tracking programs.

Processes billing for Maintenance/Vacancy Task Force charges.

Assist with printing, mailing, data entry, filing and other tasks related to the position.

Assist as requested and perform any special projects as needed.

Attend Board meetings, workshops, conferences, seminars, and other job related training, as requested.

Carry out any additional assignments or responsibilities that may arise when so directed by the Executive Director, Director of Public Housing or Property Managers.

Maintenance Laborer/ Mechanic I

Work for this position involves the performance of routine, semi-routine, emergency, and diversified maintenance duties for repairs to, and maintenance of buildings, units and grounds.

This job requires many skills such as but not limited to: cleaning, janitorial, trash removal, landscaping, painting, ceiling and wall repair, unit turnovers, climbing ladders and assisting the maintenance department mechanics and tradesmen in a variety of different ways.

The position is expected to have knowledge of, or basic skills in plumbing, heating systems, electrical switches, stoves and refrigerators; windows, doors and other wood materials, mechanical equipment.

The position is required to use a phone, tablet and desk top computer (with training) to utilize maintenance operation software programs.

The position also entails driving a company vehicle and transporting equipment, tools and supplies as needed to job sites.

Additional duties or responsibilities may be assigned by the Director of Maintenance or Executive Director as determined by need.

SALEM HOUSING AUTHORITY

Five-Year Public Housing Agency Plan

For fiscal year: 2024^s

SALEM HOUSING AUTHORITY

27 Charter Street
Salem, MA 01970
Phone: 978-744-4431
Fax: 978-744-9614
E-mail: choog@salemha.org
Website: www.salemha.org

5-Year PHA Plan (for All PHAs)

U.S. Department of Housing and Urban Development
Office of Public and Indian Housing

OMB No. 2577-0226
Expires: 03/31/2024

Purpose. The 5-Year and Annual PHA Plans provide a ready source for interested parties to locate basic PHA policies, rules, and requirements concerning the PHA's operations, programs, and services, and informs HUD, families served by the PHA, and members of the public of the PHA's mission, goals and objectives for serving the needs of low- income, very low- income, and extremely low- income families

Applicability. The Form HUD-50075-5Y is to be completed once every 5 PHA fiscal years by all PHAs.

A. wa					
A.1 PHA Name: <u>Salem Housing Authority</u> PHA Code: <u>MA055</u>					
PHA Plan for Fiscal Year Beginning: (MM/YYYY): <u>10/2024</u>					
The Five-Year Period of the Plan (i.e. 2019-2023): <u>2024-2028</u>					
PHA Plan Submission Type: ☒ 5-Year Plan Submission ☐ Revised 5-Year Plan Submission					
Availability of Information. In addition to the items listed in this form, PHAs must have the elements listed below readily available to the public. A PHA must identify the specific location(s) where the proposed PHA Plan, PHA Plan Elements, and all information relevant to the public hearing and proposed PHA Plan are available for inspection by the public. Additionally, the PHA must provide information on how the public may reasonably obtain additional information on the PHA policies contained in the standard Annual Plan, but excluded from their streamlined submissions. At a minimum, PHAs must post PHA Plans, including updates, at each Asset Management Project (AMP) and main office or central office of the PHA. PHAs are strongly encouraged to post complete PHA Plans on their official websites. PHAs are also encouraged to provide each resident council a copy of their PHA Plans. The 5-Year plan along with all its elements can be obtained at the Authority's Administrative office located at 27 Charter Street, Salem MA 01970, at the Section 8 Office located at 136 Canal St. Suite 2, Salem and on our website: https://salemha.org. Copies of the proposed PHA Plan have been provided to the RAB members participating in the remote RAB meetings. Once approved, the final PHA Plan will replace the draft PHA Plan and will be made available at the SHA Administrative Office and at https://salemha.org.					
☐ PHA Consortia: (Check box if submitting a Joint PHA Plan and complete table below.)					
Participating PHAs	PHA Code	Program(s) in the Consortia	Program(s) not in the Consortia	No. of Units in Each Program	
				PH	HCV
Lead PHA:					
B. Plan Elements. Required for all PHAs completing this form.					

B.1	Mission. State the PHA's mission for serving the needs of low-income, very low-income, and extremely low-income families in the PHA's jurisdiction for the next five years. <i>The Salem Housing Authority is committed to providing a full range of affordable housing opportunities that are decent, safe, and sanitary to eligible low-income elderly, family, and handicapped persons in a fair manner. We strive to make the best use of all available resources so that our residents and participants may live in an environment that is clean, well maintained and attractive by taking advantage of available government resources. Our goal is to manage our public housing units in a manner that is consistent with good, financially sound property management practices.</i> <i>We endeavor to instill pride and a desire for an enhanced quality of life for our residents and their families. We are committed to servicing our residents and participants and this entire community in a manner that demonstrates professional courtesy, respect and caring.</i> <i>We are committed to fair and non-discriminatory practices throughout all of our housing programs and design policies that aim to de-concentrate poverty and provide support to access affordable housing opportunities. The Salem Housing Authority is committed to assisting all residents who are moving from welfare-to-work with affordable housing opportunities that do not act as disincentives to economic advancement.</i>
B.2	Goals and Objectives. Identify the PHA's quantifiable goals and objectives that will enable the PHA to serve the needs of low-income, very low-income, and extremely low-income families for the next five years. ➤ <i>To continue providing a high-quality Section 8 Housing Choice Voucher and project-based housing assistance program by maintaining a high score under Section Eight Management Assessment Program (SEMAP).</i> ➤ <i>Continue to manage the Authority's public housing program efficiently and maintain the designation as a "High Performer" by the Public Housing Assessment System (PHAS).</i> ➤ <i>Maintain Public housing properties in compliance with INSPIRE and Housing Choice Voucher subsidized units in compliance with Housing Quality Standards (HQS).</i> ➤ <i>To ensure equal opportunity in housing for all qualified applicants. The Authority is committed to fair and non-discriminatory practice and this is accomplished by ensuring access to assisted housing regardless of race, sex, familial status, religion, disability, sexual orientation.</i> ➤ <i>SHA is committed to completing voluntary conversion of federal public housing. SHA included residents in the process of exploration and has started the conversion process. It is the goal of the SHA to Convert all Federal Public Housing to project-based units.</i>

B.3	Prog	B.3	Include a report on the progress the PHA has made in meeting the goals and objectives described in the previous 5-Year Plan. ➤ The SHA has trained staff on trauma informed care and has integrated this practice throughout its operation. ➤ The SHA continues to engage in a collaborative relationship with many local community agencies/service entities which benefits the families we serve. This initiative has expanded under the new Family Self Sufficiency program. ➤ The SHA continues to maintain SEMAP high performer status. ➤ The SHA continues to undertake affirmative action measures to ensure equal access to assisted housing, regardless of race, color religion, national origin, sex, familial status or disability. The sha promotes and furthers section 504 and reasonable accommodation practices. ➤ The SHA has a language access plan and informs all residents, participants, applicants and others of vawa related requirements and protections. ➤ The Authority continues its mission of serving applicants, residents and participants in a manner that demonstrates professional courtesy, respect and caring and in empowering residents and participants with the knowledge of what their rights are under the Violence Against Women Act (VAWA) and the American with Disabilities Act (ADA)
B.4	Violence Against Women Act (VAWA) Goals. Provide a statement of the PHA's goals, activities, objectives, policies, or programs that will enable the PHA to serve the needs of child and adult victims of domestic violence, dating violence, sexual assault, or stalking. <i>See Section D.1</i>		
C. Other Document and/or Certification Requirements.			
C.1	Significant Amendment or Modification. Provide a statement on the criteria used for determining a significant amendment or modification to the 5-Year Plan. See Exhibit D		
C.2	Resident Advisory Board (RAB) Comments. (a) Did the RAB(s) have comments to the 5-Year PHA Plan? Y N ☐ ☐ (b) If yes, comments must be submitted by the PHA as an attachment to the 5-Year PHA Plan. PHAs must also include a narrative describing their analysis of the RAB recommendations and the decisions made on these recommendations.		
C.3	Certification by State or Local Officials. <u>Form HUD-50077-SL</u>, <i>Certification by State or Local Officials of PHA Plans Consistency with the Consolidated Plan</i>, must be submitted by the PHA as an electronic attachment to the PHA Plan.		

D.1

Affirmatively Furthering Fair Housing. (Non-qualified PHAs are only required to complete this section on the Annual PHA Plan. All qualified PHAs must complete this section.)

Provide a statement of the PHA's strategies and actions to achieve fair housing goals outlined in an accepted Assessment of Fair Housing (AFH) consistent with 24 CFR § 5.154(d)(5). Use the chart provided below. (PHAs should add as many goals as necessary to overcome fair housing issues and contributing factors.) Until such time as the PHA is required to submit an AFH, the PHA is not obligated to complete this chart. The PHA will fulfill, nevertheless, the requirements at 24 CFR § 903.7(o) enacted prior to August 17, 2015. See Instructions for further detail on completing this item.

Fair Housing Goal:

Describe fair housing strategies and actions to achieve the goal

VAWA 2022 provides that HUD and the Department of Justice shall implement and enforce VAWA consistent with, and in a manner that provides, the same rights and remedies as those provided for the Fair Housing Act. As such, the SHA will comply with all ongoing requirements of VAWA, including the implementation of obligations under VAWA'22. The SHA is committed to supporting the needs of victims of domestic violence and making referrals to advocacy resources. All applicants and participants will be informed that if they are applying for or receiving assistance under any housing operated by the SHA, they may have housing protections under VAWA. The following VAWA forms will be provided directly to family members during the admissions process while a participant and upon proposed termination: the notice of occupancy rights under the Violence Against Women Act (VAWA) (HUD form 5380) and the Certification of Domestic Violence (HUD form 5382). The SHA will maintain strict privacy controls in relation to VAWA records and may retain records of VAWA requests and outcomes as needed to comply with VAWA'22.

The SHA will make readily available for all applicants and participants educational material about fair housing rights and responsibilities consistent with 24 CFR § 5.154(d)(5).

The SHA will conduct an annual assessment of SHA waiting lists to ensure marketing strategies target minority groups identified as having a lower percentage than the local jurisdiction's most recent census report for minority backgrounds in the Salem area.

The SHA will Ensure that all aspects of the SHA's Fair Housing Plan is carried out.

Fair Housing Goal:

Describe fair housing strategies and actions to achieve the goal

The SHA will annually review the payments standards set by the SHA to ensure they are high enough to allow families a reasonable selection of modest, decent, safe, and sanitary housing in a range of neighborhoods in the PHA's jurisdiction. To meet that objective and to support families wishing to move to areas with lower concentrations of poor and minority households, the SHA may also establish higher payment standard schedules for certain areas so that families can rent units in more desirable areas.

Instructions for Preparation of Form HUD-50075-5Y - 5-Year PHA Plan for All PHAs

A. PHA Information. All PHAs must complete this section. (24 CFR § 903.4)

- A.1 Include the full PHA Name, PHA Code, PHA Fiscal Year Beginning (MM/YYYY), Five-Year Period that the Plan covers, i.e. 2019-2023, PHA Plan Submission Type, and the Availability of Information, specific location(s) of all information relevant to the hearing and proposed PHA Plan.

PHA Consortia: Check box if submitting a Joint PHA Plan and complete the table.

B. Plan Elements.

- B.1 **Mission.** State the PHA's mission for serving the needs of low- income, very low- income, and extremely low- income families in the PHA's jurisdiction for the next five years. (24 CFR § 903.6(a)(1))
- B.2 **Goals and Objectives.** Identify the PHA's quantifiable goals and objectives that will enable the PHA to serve the needs of low- income, very low- income, and extremely low- income families for the next five years. (24 CFR § 903.6(b)(1))
- B.3 **Progress Report.** Include a report on the progress the PHA has made in meeting the goals and objectives described in the previous 5- Year Plan. (24 CFR § 903.6(b)(2))
- B.4 **Violence Against Women Act (VAWA) Goals.** Provide a statement of the PHA's goals, activities objectives, policies, or programs that will enable the PHA to serve the needs of child and adult victims of domestic violence, dating violence, sexual assault, or stalking. (24 CFR § 903.6(a)(3)).

C. Other Document and/or Certification Requirements.

- C.1 **Significant Amendment or Modification.** Provide a statement on the criteria used for determining a significant amendment or modification to the 5-Year Plan. For modifications resulting from the Rental Assistance Demonstration (RAD) program, refer to the 'Sample PHA Plan Amendment' found in Notice PIH-2012-32, REV 2.

C.2 Resident Advisory Board (RAB) comments.

- (a) Did the public or RAB have comments?
- (b) If yes, submit comments as an attachment to the Plan and describe the analysis of the comments and the PHA's decision made on these recommendations. (24 CFR § 903.17(b), 24 CFR § 903.19)

C.3 Certification by State or Local Officials.

Form HUD-50077-SL, *Certification by State or Local Officials of PHA Plans Consistency with the Consolidated Plan*, must be submitted by the PHA as an electronic attachment to the PHA Plan.

C.4 Required Submission for HUD FO Review.

Challenged Elements.

- (a) Did the public challenge any elements of the Plan?
- (b) If yes, include such information as an attachment to the Annual PHA Plan or 5-Year PHA Plan with a description of any challenges to Plan elements, the source of the challenge, and the PHA's response to the public.

D. Affirmatively Furthering Fair Housing.

(Non-qualified PHAs are only required to complete this section on the Annual PHA Plan. All qualified PHAs must complete this section.)

D.1 **Affirmatively Furthering Fair Housing.** The PHA will use the answer blocks in item D.1 to provide a statement of its strategies and actions to implement each fair housing goal outlined in its accepted Assessment of Fair Housing (AFH) consistent with 24 CFR § 5.154(d)(5) that states, in relevant part: "To implement goals and priorities in an AFH, strategies and actions shall be included in program participants' ... PHA Plans (including any plans incorporated therein) Strategies and actions must affirmatively further fair housing" Use the chart provided to specify each fair housing goal from the PHA's AFH for which the PHA is the responsible program participant – whether the AFH was prepared solely by the PHA, jointly with one or more other PHAs, or in collaboration with a state or local jurisdiction – and specify the fair housing strategies and actions to be implemented by the PHA during the period covered by this PHA Plan. If there are more than three fair housing goals, add answer blocks as necessary.

Until such time as the PHA is required to submit an AFH, the PHA will not have to complete section D.; nevertheless, the PHA will address its obligation to affirmatively further fair housing in part by fulfilling the requirements at 24 CFR 903.7(o)(3) enacted prior to August 17, 2015, which means that it examines its own programs or proposed programs; identifies any impediments to fair housing choice within those programs; addresses those impediments in a reasonable fashion in view of the resources available; works with local jurisdictions to implement any of the jurisdiction's initiatives to affirmatively further fair housing that require the PHA's involvement; and maintain records reflecting these analyses and actions. Furthermore, under Section 5A(d)(15) of the U.S. Housing Act of 1937, as amended, a PHA must submit a civil rights certification with its Annual PHA Plan, which is described at 24 CFR 903.7(o)(1) except for qualified PHAs who submit the Form HUD-50077-CR as a standalone document.

This information collection is authorized by Section 511 of the Quality Housing and Work Responsibility Act, which added a new section 5A to the U.S. Housing Act of 1937, as amended, which introduced the 5-Year PHA Plan. The 5-Year PHA Plan provides the PHA's mission, goals and objectives for serving the needs of low- income, very low- income, and extremely low- income families and the progress made in meeting the goals and objectives described in the previous 5-Year Plan.

Public reporting burden for this information collection is estimated to average 1.64 hours per year per response or 8.2 hours per response every five years, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. HUD may not collect this information, and respondents are not required to complete this form, unless it displays a currently valid OMB Control Number.

Privacy Act Notice. The United States Department of Housing and Urban Development is authorized to solicit the information requested in this form by virtue of Title 12, U.S. Code, Section 1701 et seq., and regulations promulgated thereunder at Title 12, Code of Federal Regulations. Responses to the collection of information are required to obtain a benefit or to retain a benefit. The information requested does not lend itself to confidentiality.

EXHIBIT A

Salem Housing Authority Summary of Admin Plan and ACOP HOTMA POLICY DECISIONS

Expected Effective:
Pending HUD Guidance on Effective Date

1. SELF-CERTIFICATION OF NET FAMILY ASSETS: 24 CFR 5.603(b) "Net Family Assets" para. (2); 5.618(b)

The PHA will determine net family assets and anticipated income earned from assets at new admission and at recertification by fully verifying the information through bank statements provided by the family, regardless of the family having assets that are equal to or less than \$50,000.

Asset Limits: Asset Limitation for Interim and Annual Reexamination (24 CFR § 5.618)
At admission, a family may not be assisted if they have \$100,000 or more in assets or real property ownership. The PHA will not enforce the \$100,000 asset limit at recertification for participant families.

2. DETERMINING NET FAMILY ASSETS : 24 CFR 5.603(b)(3) and (4)
The PHA must include the value of non- necessary items of personal property if the combined value exceeds \$50,000.

3. HARDSHIP EXEMPTIONS FOR HEALTH/MEDICAL CARE EXPENSES & REASONABLE ATTENDANT CARE & AUXILIARY APPARATUS EXPENSES – GENERAL RELIEF : CFR 5.611(c)(1) and 5.611(c)(2)
The Health and Medical Care Expenses deduction will be capped at qualifying expenses in excess of 10% of annual income. The PHA will incrementally implement this policy for current participants with medical expenses. "Phased in Relief", will begin automatically as 5% in the first year; 7.5% for the second year and 10% for the third year.

A family that did not previously have medical expenses (prior to Jan. 2025) may request a hardship exemption for up to four 90-day periods (deduction capped at qualifying expense in excess of 5% (instead of 10%)) for an unexpected increase in health or medical care expenses, which must be verified.

4. HARDSHIP EXEMPTION TO CONTINUE CHILDCARE EXPENSES DEDUCTION: 24 CFR 5.611(a)(4)
The PHA may extend the childcare expense deduction for a 90-day period if the family member is no longer employed, looking for work, or furthering his or her education
5. INTERIM REEXAMINATIONS: 24 CFR §§ 960.257(b)(6); 982.516(c)(4); and 882.515(b)(4) - (b)(5).
Families must report all changes in family income or composition within 7 business days from the effective date of the change to be considered "timely."
6. DECREASES IN INCOME : 24 CFR §§ 960.257(b)(2); 982.516(c)(2); and 882.515(b)(2)
An interim reexamination will be conducted when the PHA is notified by the family that the family's adjusted income has changed by an amount that is estimated to result in a decrease of 10% or more of the family's annual adjusted income

7. INCREASES IN INCOME: 24 CFR §§ 5.657(c)(3); 960.257(b)(3); 982.516(c)(3); and 882.515(b)(3)
All families are required to report any changes in family income. The PHA will not consider any increases in **earned income** when estimating or calculating whether the family's adjusted income has increased unless the family had a previous interim examination where the family's income, of any type, decreased during the same reexamination cycle. Although families are required to report all changes in income and household composition, no interim reexaminations will be conducted due to increases in annual adjusted income in the 3 months before the next regular annual examination.
8. AUTHORIZATION FOR THE RELEASE OF INFORMATION and REVOCATION OR CONSENT
24 CFR 5.230 and 24 CFR 5.232(c)
Applicants and participants must sign and submit the HUD-9886 only once, as applicable, at admission and no later than the next interim or regularly scheduled income reexamination. Families have the right to revoke consent by notice to the PHA, however, revoking consent will result in termination or denial of assistance.
9. DE MINIMIS ERRORS 24 CFR §§ 5.609(c)(4); 960.257(f); 982.516(f); 882.515(f); and 882.808(i)(5)
Once the PHA becomes aware of the existence of an income calculation error, the error(s) will be corrected retroactive to the effective date of the action, regardless of the dollar amount associated with the error. Families will not be required to repay the PHA in instances where the PHA miscalculated income resulting in a family being undercharged for rent. The PHA will take corrective action to credit or repay a family if the family was overcharged tenant rent.
10. HUD'S ENTERPRISE INCOME VERIFICATION (EIV) : 24 CFR 5.233
The PHA will use HUD's verification hierarchy when verifying each household's income, assets, deductions, and expenses. The PHA will access the EIV system and obtain an Income Report for each household during annual and interim recertifications.
11. DETERMINATION OF INCOME USING OTHER MEANS-TESTED PUBLIC ASSISTANCE, I.E., "SAFE HARBOR" : 24 CFR 5.609(c)(3)
The PHA **will not** accept income calculation information from other means-tested forms of federal public assistance.
12. SSN Number Requirement: The PHA **will not** accept alternative documentation in lieu of the required SSN verification.

13. SYSTEM ZERO INCOME REVIEWS

24 CFR § 5.609(b)(24)(vi); 24 CFR §§ 5.657(c)(3); 960.257(b)(3); 982.516(c)(3); and 882.515(b)(3)

The PHA will continue to conduct zero-income reviews once for zero-income families. The PHA will not assign monetary values to non-monetary in-kind donations received to calculate annual income.

Non HOTMA Changes: modifications are as follows:

A. National Standards for the Physical Inspection of Real Estate: The new NSPIRE inspection standards that replace HQS becomes effective October 1, 2024.

B. Repeal of the Earned Income Disregard

Exhibit B

Public Housing Units Proposed for Disposition under Section 18

Stephen Zisson Elderly Residence

Location:

292 Essex St. (above YMCA)

Units:

14 – 1 BR apts.

Category:

Senior Citizens and Disabled

Type:

Federal Public Housing

Power Block

Location:

5 Barton Sq.

Units:

16 – 1 BR apts.

Category:

Senior Citizens and Disabled

Type:

Federal Public Housing

Scattered Sites:

Location:

2 Hathorne Crecent

Units:

2- 2BR Apartments

Category:

Family

Type:

Federal Public Housing

Location:

122 ½ Boston Street

Units:

1- 3BR Apartment

1- 4BR Apartment

Category:

Family

Type:

Federal Public Housing

Location:

73 Boston Street

Units:

1- 2BR Apartment

2- 3BR Apartments

Category:

Family

Type:

Federal Public Housing

Location:

121 ½ Bridge Street

Units:

2- 2BR Apartments

Category:

Family

Type:

Federal Public Housing

EXHIBIT C

Leefort Terrace PBV Project

This Leefort Terrace is a multifamily housing development which will be managed by Beacon Residential Management Limited Partnership and located at 1 Leefort Terrace, Salem, MA 01970. Leasing is expected in 2026.

The property includes a total of 124 apartments, consisting of the bedroom mix as indicated below:

- ☒ One-bedroom No. of apartments: 62
- ☒ Two-bedroom No. of apartments: 38
- ☒ Three-bedroom No. of apartments: 24

The project complies with the PHA Plan in the following way:

This property, the SHA, the owner and the Management Agent are committed to providing equal opportunity to all individuals who apply to and reside at the property.

a) Nondiscrimination and Affirmative Fair Housing Marketing Plan

In carrying out the Plan, Management shall not discriminate on the basis of race, color, religion, national origin, sex, disability, familial status or other basis prohibited by local, state or federal law in any aspect of tenant selection or matters related to continued occupancy.

Equal Access to Housing in HUD Programs Regardless of Sexual Orientation or Gender Identity (77 FR 5662 Effective Date: March 5, 2012) states that HUD's housing programs shall be open to all eligible individuals and families regardless of sexual orientation, gender identity, or marital status. This rule also prohibits management from asking about an applicant or resident's sexual orientation and gender identity to determine eligibility or otherwise make housing available. However, this prohibition on inquiries is not intended to prohibit mechanisms that allow for voluntary and anonymous reporting of sexual orientation or gender identity solely for compliance with data collection requirements of state or local governments or other federal assistance programs.

The Fair Housing Act, Section 504, and Title VI of the Civil Rights Act

The PHA and the Management will maintain policies to comply with Section 504 of the Rehabilitation Act of 1973, The Fair Housing Act Amendments of 1988, and Title VI of the Civil Rights Act of 1964.

Fair Housing Act – prohibits discrimination in the sale, rental, and financing of dwellings, and in other housing-related transactions, based on race, color, national origin, religion, sex, familial status (including children under the age of 18 living with parents or legal custodians, pregnant women, and people securing custody of children under the age of 18), and disability. The protection against disability discrimination covers not only tenants with disabilities but also renters without disabilities who live or are associated with individuals with disabilities. Since rules, policies, practices, and services may have a different effect on persons with disabilities than on others, treating persons with disabilities the same as others will sometimes deny them an equal opportunity to use and enjoy a dwelling. The Act also prohibits housing providers from refusing residency to persons with disabilities, or placing conditions on their residency, because they require reasonable accommodations.

Exhibit D

In accordance with Notice: PIH 99-51 (HA) III G, the Salem Housing Authority defines "Substantial Deviation" and "Significant Amendment or Modification" as follows:

The Salem Housing Authority will consider the following to be a "Substantial Deviation" of Annual Plans for the 5 Year Plan and "Significant Amendment or Modification" of the Annual Plan:

- changes to rent or admissions policies or organization of the waiting list;
- any change with regard to demolition or disposition, designation, homeownership programs or conversion activities.

Any changes to the Capital Fund Program (CFP) will not be considered a "Substantial Deviation" or "Significant Amendment or Modification"

Civil Rights Certification (Qualified PHAs)

U.S. Department of Housing and Urban Development
Office of Public and Indian Housing
OMB Approval No. 2577-0226
Expires 3/31/2024

Civil Rights Certification

Annual Certification and Board Resolution

Acting on behalf of the Board of Commissioners of the Public Housing Agency (PHA) listed below, as its Chairperson or other authorized PHA official if there is no Board of Commissioners, I approve the submission of the 5-Year PHA Plan, hereinafter referred to as "the Plan", of which this document is a part, and make the following certification and agreements with the Department of Housing and Urban Development (HUD) for the fiscal year beginning _____ in which the PHA receives assistance under 42 U.S.C. 1437f and/or 1437g in connection with the mission, goals, and objectives of the public housing agency and implementation thereof:

The PHA certifies that it will carry out the public housing program of the agency in conformity with title VI of the Civil Rights Act of 1964 (42 U.S.C. 2000d-2000d-4), the Fair Housing Act (42 U.S.C. 3601-19), Section 504 of the Rehabilitation Act of 1973 (29 U.S.C. 794), title II of the Americans with Disabilities Act (42 U.S.C. 12101 *et seq.*), and other applicable civil rights requirements and that it will affirmatively further fair housing in the administration of the program. In addition, if it administers a Housing Choice Voucher Program, the PHA certifies that it will administer the program in conformity with the Fair Housing Act, title VI of the Civil Rights Act of 1964, Section 504 of the Rehabilitation Act of 1973, title II of the Americans with Disabilities Act, and other applicable civil rights requirements, and that it will affirmatively further fair housing in the administration of the program. The PHA will affirmatively further fair housing, which means that it will take meaningful actions to further the goals identified in the Assessment of Fair Housing (AFH) conducted in accordance with the requirements of 24 CFR § 5.150 through 5.180, that it will take no action that is materially inconsistent with its obligation to affirmatively further fair housing, and that it will address fair housing issues and contributing factors in its programs, in accordance with 24 CFR § 903.7(o)(3). The PHA will fulfill the requirements at 24 CFR § 903.7(o) and 24 CFR § 903.15(d). Until such time as the PHA is required to submit an AFH, the PHA will fulfill the requirements at 24 CFR § 903.7(o) promulgated prior to August 17, 2015, which means that it examines its programs or proposed programs; identifies any impediments to fair housing choice within those programs; addresses those impediments in a reasonable fashion in view of the resources available; works with local jurisdictions to implement any of the jurisdiction's initiatives to affirmatively further fair housing that require the PHA's involvement; and maintains records reflecting these analyses and actions.

PHA Name

PHA Number/HA Code

I hereby certify that all the statement above, as well as any information provided in the accompaniment herewith, is true and accurate. **Warning:** HUD will prosecute false claims and statements. Conviction may result in criminal and/or civil penalties. (18 U.S.C. 1001, 1010, 1012; 31 U.S.C. 3729, 3802)

Name of Executive Director:

Name of Board Chairperson:

Signature

Date

Signature

Date

The United States Department of Housing and Urban Development is authorized to collect the information requested in this form by virtue of Title 12, U.S. Code, Section 1701 *et seq.*, and regulations promulgated thereunder at Title 12, Code of Federal Regulations. Responses to the collection of information are required to obtain a benefit or to retain a benefit. The information requested does not lend itself to confidentiality. The information is collected to ensure that PHAs carry out applicable civil rights requirements.

Public reporting burden for this information collection is estimated to average 0.16 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. HUD may not collect this information, and respondents are not required to complete this form, unless it displays a currently valid OMB Control Number.

**Certification by State or Local
Official of PHA Plans Consistency
with the Consolidated Plan or
State Consolidated Plan
(All PHAs)**

U. S Department of Housing and Urban Development
Office of Public and Indian Housing
OMB No. 2577-0226
Expires 3/31/2024

**Certification by State or Local Official of PHA Plans
Consistency with the Consolidated Plan or State Consolidated Plan**

I, _____, the _____
Official's Name *Official's Title*

certify that the 5-Year PHA Plan for fiscal years _____ and/or Annual PHA Plan for fiscal
year _____ of the _____ is consistent with the
PHA Name

Consolidated Plan or State Consolidated Plan including the Analysis of Impediments (AI) to Fair
Housing Choice or Assessment of Fair Housing (AFH) as applicable to the

Local Jurisdiction Name

pursuant to 24 CFR Part 91 and 24 CFR § 903.15.

Provide a description of how the PHA Plan's contents are consistent with the Consolidated Plan or
State Consolidated Plan.

I hereby certify that all the information stated herein, as well as any information provided in the accompaniment herewith, is true and accurate. Warning: HUD will
prosecute false claims and statements. Conviction may result in criminal and/or civil penalties. (18 U.S.C. 1001, 1010, 1012; 31 U.S.C. 3729, 3802)

Name of Authorized Official:

Title:

Signature:

Date:

The United States Department of Housing and Urban Development is authorized to solicit the information requested in this form by virtue of Title 12, U.S.
Code, Section 1701 et seq., and regulations promulgated thereunder at Title 12, Code of Federal Regulations. Responses to the collection of information
are required to obtain a benefit or to retain a benefit. The information requested does not lend itself to confidentiality. This information is collected to
ensure consistency with the consolidated plan or state consolidated plan.

Public reporting burden for this information collection is estimated to average 0.16 hours per year 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. HUD
may not collect this information, and respondents are not required to complete this form, unless it displays a currently valid OMB Control Number.

Resolution on Public Comment Participation

WHEREAS, the Salem Housing Authority Board is committed to ensuring open, transparent, and fair communication between the Authority and its tenants, residents, and the broader community;

WHEREAS, public comment periods at board meetings provide an essential platform for tenants to express concerns, provide feedback without undue interference, and contribute to the decision-making process;

WHEREAS, under Massachusetts General Law (M.G.L. c. 268A), municipal employees are prohibited from using their official positions to improperly influence public processes;

NOW, THEREFORE, BE IT RESOLVED THAT:

1. Commitment to Public Participation

- All regular and special meetings of the Housing Authority Board shall be open to the public and conducted in accordance with the Massachusetts Open Meeting Law (OML).
- A public comment period shall be included in each meeting, whenever possible, whether held in person, online, or in a hybrid format.

2. Structure and Conduct of Public Comment

- A summary of public comment procedures shall be read aloud at the beginning of each meeting.
- A sign-up sheet will be available for in-person attendees before the meeting is called to order. Those joining remotely may submit written comments to be read into the record or request recognition to speak live during the meeting.
- Speakers shall identify themselves by name, address, and, if applicable, their relation to the Housing Authority.
- Public comment is intended to address matters within the Board's jurisdiction, including housing policies, tenant concerns, and agency accountability.
- Speakers shall be limited to three (3) minutes per person unless otherwise determined by the Chair.

3. Decorum and Enforcement

- All remarks shall be addressed to the Chair, and all participants are expected to conduct themselves respectfully.

- The Board Chair is responsible for maintaining decorum, ensuring discussions remain orderly, and enforcing these guidelines.
- No person shall disrupt a Board meeting. If a person continues to disrupt proceedings after a warning, the Chair may request their removal from the meeting per OML.

Efforts will be made to ensure equitable access for all, including language interpretation services where necessary. This Resolution shall take effect immediately and will be adhered to in all future Board meetings. The Board shall review this resolution as needed to ensure it remains aligned with the needs of the tenants and the broader community.

Adopted by the Salem Housing Authority Board on February 12, 2025