



Commonwealth of Massachusetts  
**DEPARTMENT OF HOUSING &  
COMMUNITY DEVELOPMENT**

Deval L. Patrick, Governor ♦ Aaron Gornstein, Undersecretary

## **Public Housing Notice 2014-01**

To: Public Housing Authority Executive Directors  
From: Lizbeth Heyer, Associate Director for Public Housing & Rental Assistance  
Subject: **FY14 Capital Program Management Tools – Small Project Invoicing, Design Rebate Protocol and Read Only FISH Access**  
Date: January xx, 2014

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The purpose of this Public Housing Notice (PHN) is to provide all Local Housing Authorities (LHAs) important updates about tools for project management and small projects implementation. Key highlights include:

1. New Small Project Standard Invoice Protocol (for projects with construction costs under \$25,000) will help organize and expedite project payment and closeout. **Required starting February 1, 2014.**
2. Design Rebate for Small Projects –will provide additional resources for all LHAs to hire consultants to help implement projects
3. Read Only Access to FISH (Financial Information System for Housing) will help housing authorities track project schedules and budgets

### **1. Standard Invoice Form and Protocol for Small Projects**

Over 600 Formula Funded small projects are now being managed by housing authorities per year – a great accomplishment! Once approved, Special Initiative projects that are under \$25,000 are likely to add another 200. It has been an administrative challenge for DHCD when the majority of these projects complete construction in the spring and therefore closeout at the end of the fiscal year. While we appreciate many authorities send an invoice summary in a cover letter and attach the required Certification of Compliance with Capital Plan and Bidding Laws, many others send small project invoices with minimal documentation.

**Starting in February, LHAs will need to use the attached Standard Invoice for Small Projects** (attached to this PHN) for the projects you received approval to administer independently because the construction cost was estimated at less than \$25,000. The standard invoice is intended to help you organize the project information and documentation, so we can process payments promptly. For most LHAs it will save the time you take to create a cover memo or letter, and will remind you to transmit the Certification required at the end of the project. The form is ‘fillable’ so if you submit more than one

invoice it will add them and total. Additionally, a standard document will allow us to realign some work processes within our office and use our staff more efficiently.

**With this change to the new form, invoices for your Small Projects no longer go to your Project Manager.** Instead, please send them via email to [DHCDlhainvoices@massmail.state.ma.us](mailto:DHCDlhainvoices@massmail.state.ma.us) or via US Mail to Gail Cassarino, DHCD, 100 Cambridge Street, Suite 300, Boston, MA 02114.

In addition to the Standard Invoice Form, you can find the forms you need to submit with the invoice at the Small Projects web page: <http://www.mass.gov/hed/housing/ph-mod/0-25000-dhcd-small-projects-guide.html>

- Standard Invoice Form
- Certificate of Compliance
- Budget Form

## **2. Small Project Design Rebate Protocol for ALL LHAs**

As of September 24, 2013, all LHAs are eligible for a DHCD supplemental “rebate” on 50% of the cost of hiring private practice architects and engineers to help advance small projects that you received approval to administer independently because the construction cost was estimated at less than \$25,000. The total amount of the rebate may not exceed \$3,000 per project, since design fees for small projects would typically not exceed \$6,000 on a \$25,000 project. Eligible costs include services performed by licensed design professionals including costs reimbursed to those designers (e.g., sub consultants, printing, mileage). In order to receive a rebate for a current project, at least one of the designer’s invoices must be reimbursed by DHCD on or after 9/24/13, the date of the PHN announcing the program. These supplemental funds will be not be disbursed through a separate amendment but instead will be processed as a rebate that will be added to the LHA’s next year FF award.

In the September 2013 PHN, you will see that this program was originally directed to LHAs with fewer than 200 units. At the November NAHRO conference, we heard from many LHAs that the rebate combined with House Doctor Lite was an important tool for all LHAs, so we are expanding the rebate program to serve all LHAs regardless of size. Please take advantage of this resource if it will help you to keep your small projects on schedule! (You can find information about House Doctor Lite on the web at <http://www.mass.gov/hed/docs/dhcd/ph/small-projects/housedoctorliteprogramforsmallproj.pdf>)

We want to make the process of receiving this additional funding as easy as possible. Here’s how we will administer this program:

- You do not need to make a specific request for design funding.
- Each year before we make the next round of Formula Funding awards, we will check our project records to create a list of eligible, **closed** projects where design funds have been reimbursed by DHCD on or after 9/24/13 and the ‘rebate amount’ which will then be incorporated into the LHA’s next FF award.
- We will publish the list of ‘rebates’ awarded so you can check that you’ve received funding for projects you think are eligible.

### **3. Read Only Access to FISH (Financial Information System for Housing) will help housing authorities track project schedules and budget**

DHCD Project Managers (PMs), technical staff and managers use an information system known as FISH to manage, close, and archive capital projects. All projects, large and small, have FISH numbers and are tracked in FISH. Once a capital project is part of an approved Capital Improvement Plan (CIP), the budget and schedule functions of FISH are a dynamic resource that can help housing authorities better understand the real-time status and trajectory of their capital projects. Many LHAs have asked for access and we're happy to announce that Read Only access to FISH is available so that Executive Directors can view the latest information on each project.

All LHAs received notice of the availability of Read Only Access via email on 11/14/13. That email is attached here since it provides instructions for accessing and information about what is available on the web.

Thank you for your commitment to advancing your Formula Funding projects large and small. Please keep DHCD apprised of ways that we can further support your success.

#### Attachments

1. Standard Invoice Form – blank
2. Standard invoice form - Sample
3. Email about FISH Read Only access