

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

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

Public Housing Notice 2025-09

MEMORANDUM

To: All Local Housing Authority (LHA) Executive Directors
From: Fatima Razzaq, Acting Director Division of Public Housing
Re: Annual Plan Update
Date: July 31, 2025

The purpose of this Public Housing Notice (PHN) is to announce a software update for the Annual Plan (AP). We hope to provide you with a brief overview of what you will need to do, how you will be trained, and furnish you with links to training materials and other documents that will help guide you through the process. The guidance in this Public Housing Notice (PHN) supersedes [PHN 2020-06, Implementation of the Annual Plan per Chapter 121B, Section 28A](#) and its attachments.

Need to Know:

- EOHLC developed a new software, CHART, Comprehensive Housing Authority Review Tool, to assist LHAs with creating and submitting the Annual Plan. *There are no changes to the Annual Plan process or document, just a new system.*
- 9/30 FYE LHAs began using CHART in March of 2025. Other LHAs will begin using CHART according to the schedule outlined on Page 4.
- If your LHA is currently working on an Annual Plans in CIMS – finish that process in CIMS and your next Annual Plan will be done in CHART.
- CyberSense will provide training for your LHA seven (7) months before your FYE.

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Annual Plan Overview

Each LHA is required to create and submit an Annual Plan that is reviewed and approved by EOHLC each Fiscal Year.

This process typically starts 7-9 months before the Fiscal Year End in order to be ready at the start of the next fiscal year. The process takes time so LHAs can engage with the LHA Board of Commissioners, tenants, and the general public. Completing the Annual Plan requires LHAs to take several steps:

1. Create a Draft Annual Plan
2. Post the Annual Plan for the public to access
3. Hold a hearing to discuss the Annual Plan
4. Incorporate feedback
5. Submit the Annual Plan to EOHLC.

EOHLC then needs to review and approve the Annual Plan so it can be finalized.

EOHLC provides custom software to enter information, upload documentation, generate the Annual Plan document, and submit the Annual Plan to EOHLC for approval. There are approximately 10 forms for LHAs to complete the Annual Plan (AP). The sections of the Annual Plan are listed below in more detail (starts on Page 3).

An EOHLC training partner provides training and one-on-one support to LHA staff throughout the Annual Plan process. If LHAs have technical questions about their Annual Plan, they should submit a PHASRS ticket or contact CyberSense.

Purpose of the Annual Plan

The Annual Plan is legislatively mandated by Chapter 235 of the Acts of 2014 (the Public Housing Reform Bill¹). M.G.L. Chapter 121B, Section 28A outlines the specific elements that the Annual Plan must contain. The Annual Plan has been required of all Local Housing Authorities (LHAs) with state-aided public housing units since Fiscal Year 2020.

The purpose of the Annual Plan is to:

- Provide Transparency by offering residents and the public with a broad array of information about LHA operations, capital plans, performance, and policies.

- Improve LHA Performance by encouraging LHAs to set goals and objectives in order to meet or improve upon the Performance Management Review (PMR) assessment standards.

What is the Process?












More details are provided in the attachments, but briefly the key steps are:

1. Training: Sign up for Cybersense online training. Cybersense will email the Executive Director prior to the kick off of the Annual Plan process, approximately 7 months before the LHA FYE.
2. CIP: Prepare your CIP, with Cybersense or RCAT assistance as appropriate
3. Gather the info you'll need to fill out your AP, as shown in AP Preparation Checklist
4. Pick a date for your public hearing, and make sure to post your hearing notice and draft AP 46 days in advance (see attached '[AP Date Calculator](#)' for more detail)
5. Review the AP with Local Tenant Organizations (LTOs), if any
6. Hold a public hearing, hosted by the Board, with a quorum of members present, to accept any public comments on the draft AP
7. Review the AP and public comments with your Board, revise if needed, and obtain Board approval
8. Submit to EOHLC for Approval

Annual Plan Sections

LHAs have to complete the following sections when completing the Annual Plan in CHART :

- **LHA Info** – Certify LHA Info; Generate Hearing Notice; Review Versions of AP Draft
- **Capital Improvement Plan (CIP)** – Developed the same way as in the past, with RCAT assistance for LHAs in an RCAT
- **Maintenance** – LHAs provide information about their Maintenance and Repair plan
- **Budget** – Data about the operating budget is auto-generated from prior approved budgets/operating statements
- **PMR**– LHAs can enter their narrative responses for any PMR findings
- **LHA Policies** – A list of LHA policies and the date each was approved by LHA Board
- **Waivers** – A list of active waivers received by EOHLC (excluding those related to specific tenants or units, such as vacancy waivers)
- **Other Elements** – Documents generated by the AP system or uploaded by the LHA, including tenant survey results, public comments on the AP, if any, and the LHA's responses
- **LTO Letters** – LHAs can provide LTO information or communications about the Annual Plan
- **Public Comments** – LHAs can provide public comments they received on the Annual Plan
- **Create Annual Plan** – LHAs can view important Process Dates, Create and Publish the Annual Plan, and Submit to EOHLC

 LHA Info	✓
 CIP	✓
 Maintenance	✓
 Budget	✓
 PMR	✓
 LHA Policies	✓
 Waivers	✓
 Other Elements	✓
 LTO Letters	✓
 Public Comments	✓
 Create Annual Plan	✓

Annual Plan (AP) Software Update - 2025

EOHLC provides custom software that LHAs are required to use for completing the Annual Plan process. From 2020 to 2025, LHAs used software called CIMS to create and submit the Annual Plan. Beginning in March 2025, EOHLC began phasing in a new software named the Comprehensive Housing Authority Review Tool (CHART).

EOHLC will be rolling out Annual Plan module of CHART on a FYE quarterly basis beginning with the 9/30 FYE Cohort.

PLEASE NOTE: the Annual Plan process; the Annual Plan document; what’s required by LHAs; how LHAs interact with the Board of Commissioners, Tenants, or members of the general public WILL NOT BE DIFFERENT after this software update. The only change is the software update itself.

Annual Plans In-Progress

If your LHA is currently working on an Annual Plan in CIMS, you will complete that process in CIMS and start your next Annual Plan in CHART. Refer to the schedule for when your LHA will begin using CHART to create and submit the Annual Plan.

The Annual Plan Preparation Schedule*

The Annual Plan (AP) is due two months before the LHA’s Fiscal Year End (FYE).

AP Process Step	September FYE	December FYE	March FYE	June FYE
Select Hearing Date	Feb – Mar	May – June	Aug – Sept	Nov – Dec
Take AP Training	March	June	September	December
Prepare CIP**	March	June	September	December
Gather AP Info	March	June	September	December
Prepare AP Components	April	July	October	January
Post draft AP & Hearing Notice (46 days before the hearing date)	April	July	October	January
Review draft AP w/ LTOs	May	August	November	February
Hold Public Hearing***	June	September	December	March
Revise AP and obtain Borad approval	July	October	January	April
Submit to EOHLC by due date	July 31	October 31	January 31	April 30
EOHLC review	Aug – Sept	Nov – Dec	Feb – Mar	May – June

*The table lists recommended dates for the various AP preparation steps. For more exact dates based on your public hearing date, use the AP Date Calculator issued with this PHN.

**The CIP is completed in CIMS and imported into the Annual Plan Module of CHART. Reach out to your RCAT for assistance with your CIP.

***To work with your regular Board meeting dates, EOHLC recommends LHAs hold the public hearing in the three months prior to the FYE, allowing for the document to be revised and approved at a later Board meeting, if needed.

Roll-Out Schedule for CHART

AP FYE	Begin Using CHART	Post Draft AP & Hearing Notice	Annual Plan Hearing	Submit Annual Plan
9/30/2026	March 2025	15 Apr – 15 May 2025	June 2025	July 31, 2025
12/31/2026	June 2025	15 Jul – 15 Aug 2025	September 2025	October 31, 2025
3/31/2027	September 2025	15 Oct – 15 Nov 2025	December 2025	January 31, 2026
6/30/2027	December 2025	15 Jan – 15 Feb 2026	March 2026	April 30, 2026

This schedule outlines when each FYE Cohort will use CHART to complete the Annual Plan process.

Roll-Out Support for LHAs

CyberSense will be working directly with LHA staff throughout the Annual Plan process to create AP sections, publish the AP online, generate hard copies of the AP and the Public Hearing Notice, and submit the finalized AP to EOHLC.

Cybersense will reach out to your LHA with support session sign up information approximately seven (7) months before the end of your fiscal year. EOHLC strongly recommends that all LHAs sign up for a support session with CyberSense, especially as the transition to CHART is on-going. If you have technical questions about the Annual Plan process in CHART, please submit a [PHASRS](#) ticket.

Attachments

Attachment A: AP Date Calculator

Attachment B: Annual Plan Preparation Checklist