

LHA Annual Plan Checklist

For Massachusetts Local Housing Authorities (LHAs)

A checklist for LHAs with state-aided public housing units for using CHART (the Comprehensive Housing Authority Review Tool) web application to prepare the Annual Plan.

1. General Preparation

- ☐ Have your CHART username & password at hand.
- ☐ Have a proposed hearing date & location (*For June FYE LHAs, select a date in March.*)
- ☐ Have a list of your LTOs with their dates of recognition by the LHA.

2. LHA Info

- ☐ Certify that the LHA Info is correct
- ☐ Certify that LHA user access to EOHLC systems is correct
- ☐ Review the AP Timeline
- ☐ Enter the Hearing Date and LTO Information
- ☐ Generate the Hearing Notice

3. Capital Improvement Plan (CIP)

- ☐ LHA/RCAT to create CIP as usual.
- ☐ Once CIP is created, make your appointment with CyberSense.
- ☐ OPTIONAL: Consider if there are things you wish to highlight about your CIP in the Annual Plan that you haven't already covered in the CIP Narrative or that you want to draw special attention to.
- ☐ OPTIONAL: Draft a comment regarding your project funding- Did you receive CDBG or CPS funding? Or get funding from other non-EOHLC sources? This is a good place to explain any unusual funding, thank the town for a CPA award, or to identify the specific "Special Program" funding from EOHLC.

4. Maintenance and Repair Plan - Explanation of work orders and their priorities is automatically included.

- ☐ OPTIONAL: Draft comment as to how the priorities are uniquely applied at your LHA.
- ☐ Collect emergency and normal maintenance contact information.
- ☐ List items that qualify as emergencies.
- ☐ Know the process steps used in your work order process.
- ☐ Answer the 3 questions (5a, 5b, & 5c) for your Maintenance Plan Narrative.
 - ☐ Narrative Question # 1: How would you assess your Maintenance Operations based on feedback you've received from staff, tenants, DHCD (PMR & AUP), and any other sources?
 - ☐ Narrative Question # 2: What changes have you made to maintenance operations in the past year?
 - ☐ Narrative Question # 3: What are your maintenance goals for this coming year?

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- ☐ Prepare PDF document of preventive maintenance plan. Customize one of the sample formats for the preventative maintenance schedule or use an appropriate report from your work order management system.
- ☐ Prepare table of deferred maintenance items following the guidance in [PHN 2016-16](#). See also the sample format in the deferred maintenance schedule.
- 5. Operating Budget - CHART imports 2 years' budgets and 1 year actual spending from HAFIS. Explanation of accounts are automatically included.
 - ☐ OPTIONAL: Comment on changes for the coming year or to address unusual circumstances in the reported budgets.
- 6. Narrative responses to PMR findings
 - ☐ Prepare responses to "Corrective Action" ratings with your understanding of the reason for the rating (statement #1) and what you are doing to improve performance (statement #2).
 - ☐ OPTIONAL: Prepare responses to "Operational Guidance" ratings with your understanding of the reason for the rating and what you are doing to improve performance.
 - ☐ OPTIONAL: Add text at the end of this component to highlight your good performance or to address any other items not covered in the rating responses.
- 7. Policies
 - ☐ Prepare a list of LHA policies with the date of the most recent approved revision.
- 8. Waivers
 - ☐ Prepare a list of any waivers from EOHLC requirements, not including vacancy or pet waivers or any waiver that would reveal PII (Personally Identifiable Information). Include the date the waiver was granted by EOHLC and the expiration date for the waiver.
- 9. Other Elements – The "Other Elements" page primarily contains the Tenant Survey Results and the Performance Management Review (PMR) Report. These documents are uploaded by EOHLC.
 - ☐ OPTIONAL: Provide any additional documents that your LHA would like to include in the Annual Plan.
- 10. LTO Letter(s) – The LHA is required to engage the Local Tenant's Organization(s) to gather feedback. LHAs are required to upload a letter from each LTO or from the RAB representing multiple LTOs.
 - ☐ Gather Letters from LTOs.
 - ☐ Upload the LTO Letters into CHART. If the LHA does not have a Letter from an LTO to upload, the LHA will need to upload a memo stating the reasons for the omission.
- 11. Public Comments – The LHA is required to hold a hearing to present the Annual Plan and gather feedback from the public. LHAs are required to upload a memo summarizing all substantive comments received from the LTO, residents, or members of the general public and the LHA responses to those comments
 - ☐ Collate and summarize public comments on the Annual Plan into a memo.
 - ☐ Add the LHA response to the memo.
 - ☐ Upload the memo into CHART

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12. Create Annual Plan

- ☐ Provide the Actual Dates that Important Steps in the Public Engagement Process were completed
- ☐ Save and Publish the Annual Plan
- ☐ Once complete, submit to EOHLC.

13. Glossary – The Annual Plan incorporates a glossary of important terms. No action is required by the LHA.