BULLETIN NO. 28

Manual of Management Reports

DECEMBER 4, 1939

FEDERAL WORKS AGENCY

UNITED STATES HOUSING AUTHORITY • NATHAN STRAUS, *Administrator*

Information on Purpose, Number, Type, and Manner of Submitting Management Reports

BULLETIN No. 28 ON POLICY AND PROCEDURE

Manual of Management Reports

This Bulletin is designed to guide local housing authorities in the preparation and submission of Management Reports. These Reports have several functions. First, they make currently available to the USHA the information which it needs to fulfill its duties under the United States Housing Act and to assist local authorities in the execution of their Management Programs. Second, they present, in a readily available form, the information which the members of a local authority need for their review of management activities. Finally, the Reports make available to the employees of a local authority concerned with management, particularly those acting in supervisory capacities, the information which they need to evaluate their own work as well as the work of their subordinates.

Local authorities will observe that the Reports are designed to present the information needed for these purposes in a readily usable form.

FEDERAL WORKS AGENCY
UNITED STATES HOUSING AUTHORITY
Washington

CONTENTS

MANUAL OF MANAGEMENT REPORTS

Scope and Content.

This Bulletin sets forth (I) the purpose of the reports; (II) the number and type of reports required; and (III) the manner of submission of the reports to the USHA. The Appendix to the Bulletin contains copies of the reports required, together with instructions for their preparation.

I. Purpose of Reports.

This Bulletin, which is Manual of Management Reports, has been prepared after consultation with members of representative local housing authorities and in close cooperation with a small group of housing managers who have had actual experience in the operation of projects, and particularly in the preparation of reports. In developing this Manual the following principles have been kept constantly in mind:

(*a*) The time required by the management staff to prepare the reports must be held to an absolute minimum.

(*b*) The reports must be of direct benefit to members of the local authority to serve as a convenient manner of reviewing management activities and keeping abreast of developments in their projects.

(*c*) The reports must be of direct benefit to the staff of the local authority to serve as a basis for evaluating their own work and the work of those under their supervision through summary and analysis.

(*d*) The reports must enable the USHA to obtain records of actual operating experience in order that the USHA may serve the local authorities as a medium for the exchange of experiences, methods, and results.

(*e*) The reports must enable the USHA to fulfill its responsibilities as required of it by the United States Housing Act, which are:

(1) To review project administration by local authorities to insure that the low rent character of the projects is maintained; that no larger annual contributions are paid than is necessary; that projects are administered to promote serviceability, efficiency, economy, and stability; and that other requirements of the Act and contracts are followed.

(2) To make the annual report to the Congress which must include operating statements on all projects, including summaries of the incomes of occupants, sizes of families, rentals, and other related information.

II. Reports Required.

There follows a list of all the management reports which are required and the time these reports are to be submitted. Copies of each report form, together with instructions for preparing them, are included in the Appendix.

The number of copies specified below of each report to be submitted is the number to be furnished the USHA. The number of copies of each report to be prepared will be determined in accordance with how many copies the local authority desires to retain for its own use.

(*a*) Financial reports.—All necessary information on financial reports is included in the "Manual of Instructions of Accounting Procedure" and is not repeated here.

(*b*) Reports on applications and on leasing and occupancy.—These reports are to be submitted weekly in triplicate until 97 percent of the units in the project are occupied by tenants, and, thereafter, monthly in triplicate.

(*c*) Reports on project tenants.—These reports are to be submitted monthly as required in accordance with the attached instructions. Only one copy of each report is necessary.

(*d*) Report on premises vacated.—This report is to be submitted monthly. Only one copy is necessary.

(*e*) Report on community activities, services, and facilities.—This report is to be submitted quarterly in triplicate for the quarters ending February 28, May 31, August 31, and November 30. (This report is to be submitted for quarters different from those established for quarterly financial reports in order to spread the clerical work involved and because many community activities tend to divide naturally according to the four seasons.)

(*f*) Operation and maintenance monthly report.—This report is to be submitted monthly in triplicate.

(*g*) Distribution of labor monthly report.—This report is to be submitted monthly in triplicate.

(*h*) Report on management problems.—This report is to be submitted monthly in triplicate as required.

III. Manner of Submission to USHA.

All reports due (including financial reports) other than reports on applications and on leasing and occupancy should be placed in one envelope and forwarded by the local authority to the appropriate Regional Director of the USHA, by not later than the fifteenth day following the end of the month (or last month of the quarter) covered by the reports.

Reports on applications and on leasing and occupancy should be handled in the same manner as other reports after 97 percent of the units are occupied. Prior to the time 97 percent of the units are occupied the reports are to be sent to the appropriate Regional Director of the USHA so as to reach his office not later than Tuesday of the week following that covered by the reports.

The USHA will furnish local authorities with an initial supply of report forms upon request to the Regional Director.

Nathan Straus

NATHAN STRAUS,
Administrator.

December 4, 1939.

Appendix

REPORT FORMS AND INSTRUCTIONS

INSTRUCTIONS FOR THE REPORTS ON APPLICATIONS AND ON LEASING AND OCCUPANCY

These report forms are identical to those suggested for use by local authorities in USHA Bulletin No. 31 on Policy and Procedure "Manual of Suggested Procedure for Initial Tenant Selection and Renting." The terms used in the reports are explained in that manual.

If further explanation is necessary the USHA will furnish upon request detailed instructions for filling out the reports together with sample "work sheets" as a guide for maintaining the records necessary to prepare the forms.

Where tenant selection for several projects in one city is being conducted from a central office the local authority may submit one report on applications to cover all projects, and individual reports on leasing and occupancy for each project.

USHA 841
12-11-39

FEDERAL WORKS AGENCY
UNITED STATES HOUSING AUTHORITY

REPORT ON APPLICATIONS

Report No. ____________

Project No. ____________ ______________________________ Date ____________
(Name of authority)

Name ______________________________ City ____________________

								Total
Type Units in Project [1]								
Number of Units of Each Type								
Report on New Applications:								
Apparently eligible								
Deferred								
Ineligible								
Withdrawn								
Pending classification								
Total Number Received Since (Date of last report)								
Report on Status of All Applications:								
Apparently eligible — Pending verification								
Apparently eligible — Being verified								
Eligible — Approved pool								
Eligible — Accepted for leasing								
Deferred — Before verification								
Deferred — During verification								
Ineligible								
Withdrawn before or during verification								
Pending classification								
Total Applications Received to Date								

Reasons Deferred	Number New	Number Total	Reasons Ineligible	Number New	Number Total
Total			Total		

[1] Indicate by appropriate symbols the type units comprising the project.

Prepared by ______________________________ Date ____________

Submitted by ______________________________ Date ____________

USHA 840
12-11-39

FEDERAL WORKS AGENCY
UNITED STATES HOUSING AUTHORITY

LEASING AND OCCUPANCY REPORT

Report No. ....

Project No. .... Date ....
(Name of authority)

Name .... City ....

						Total
1. Type Units in Project [1]						
2. Number Units of Each Type						
3. Number Units Released for Occupancy						
DISPOSITION OF APPROVED APPLICATIONS TRANSFERRED TO RENTAL DEPARTMENT						
4. Total number applications transferred						
5. Total number withdrawn prior to leasing						
6. Total number leases canceled prior to occupancy						
7. Total number removals from project						
8. Number active leases						
9. Reserve—Approved applications 4−(5+6+7+8)						
LEASING AND OCCUPANCY						
10. Number leases signed since last report [2]						
11. Number leases canceled since last report [3]						
12. Number units now leased (previous total+10–11)						
13. Number units tenanted since last report						
14. Number units vacated since last report						
15. Number units now occupied (previous total+13–14)						
16. Number leased units not occupied (12–15)						
17. Number units to be leased (3–12)						

[1] Indicate by appropriate symbols in item 1 the type units comprising the project.
[2] Item 10 includes leases signed to effect transfers.
[3] Item 11 includes leases canceled prior to possession, to effect transfers, or to vacate project.

Remarks: ....

Prepared by .... Date ....

Submitted by .... Date ....

Note.—After the project is 97 percent occupied only items 1, 2, 7, 12, 15, and 17 need be filled in.

INSTRUCTIONS FOR PREPARING REPORT ON PROJECT TENANTS

Report on Project Tenants, Form USHA 41 (revised 12–2–39), constitutes the basic material for preparing summaries of the incomes of tenants, sizes of families, rentals, and other related information required to be submitted in the Annual Report to Congress. These summaries will be available to the respective local housing authorities upon request. Such data will be of direct benefit to local authorities and housing managers.

USHA 41 is to be filled out whenever a tenant occupies a dwelling and also after the annual review if the tenant is found eligible for continued occupancy. No report need be prepared after the annual review if the tenant is to be required to move from the project. If a tenant moves from one dwelling unit to another in the same project, proper entries must be made on Notice of Premises Vacated, Form USHA 836; and a new report on the tenant should be submitted, being marked in the upper right-hand corner as a supplementary report. Such procedure is necessary since a family will not generally move from one unit to another unless family composition, income, or rent will have materially changed from the conditions reported on the first card.

The data for this report may be taken from the tenants' records which are in the project files. Entries are to be made in the Data column for all items. Codes will be entered in the Washington office. It is advisable to prepare this form as soon as the tenant occupies the dwelling unit; however, all forms for tenants moving in during a given month should be forwarded at one time with other reports as already outlined in this manual. Only one copy is required by the USHA; carbon copies may be kept in the project files.

PWA Housing Division project managers will use this new Report on Project Tenants instead of the form now in use called Detail of Project Occupants, Form USHA 67 (revised), which is now superseded. Reports which are prepared after the review for eligibility for continued occupancy should be checked in the upper right-hand corner as a supplementary report if the Detail of Project Occupants has previously been submitted; and the information on the reverse side of the card need not be filled in. Of course, the Report on Project Tenants will be filled in completely for all new tenants.

A check should be made in the appropriate box in the upper right-hand corner to indicate (1) whether this is the first report on a tenant; or (2) whether this is a supplementary report, that is, a review for eligibility for continued occupancy has been made. On supplementary reports, only the front of the card should be filled in (items 1 through 14).

The date on which the report is prepared and the date on which premises were occupied must be entered. The date vacated will be entered in the Washington office when notice has been received on Form USHA 836 that the tenant has vacated such premises.

Item 1. Name of tenant.—Enter name of tenant in item 1.

Item 2. Dwelling number.—The dwelling number (sometimes referred to as "account number") should be entered in Item 2; and the total monthly rent charged the tenant for such quarters in Item 2–a. This includes shelter rent and any utilities that are furnished by the project.

Item 3. Total anticipated net annual income.—Item 3 is to be entered from Item 13–e. The figure represents the estimated income of the tenant for the coming year (income for past year adjusted for estimated changes in coming year).

Item 4. Number of rooms in dwelling unit.—Enter exact number of rooms in dwelling unit, such as 2, 2½, 3, 3½, etc. (Consult USHA Bulletin No. 2 on Policy and Procedure to determine correct room count.)

Item 5. Race.—Enter race as white, Negro, Latin-American, or other. Consider Spanish-American as Latin-American for purposes of this classification.

Item 6. Total number of persons in family.—The total number of persons in the family is to be shown according to sex. The sum of the entries for each sex in items 6–a through 6–e should equal in each case the total shown for item 6.

Item 7. Children attending public school.—Count only those children regularly attending *public* grammar, junior high, and senior high schools during the school year. Do not include persons attending kindergarten (unless attendance is required by law), private or parochial schools, or adult education classes.

Item 8. Number of persons employed.—Enter the number of persons in the family who are employed, including those on work relief. This number may be determined from the number of persons for whom earnings are reported.

Item 9. Former resident of project site.—Check "Yes" or "No" to indicate whether tenant was a resident within the project site immediately prior to establishment of the project. In cases where more than one project is being operated, check "Yes" if tenant was resident within any of the project sites immediately prior to land clearance.

Item 10. Any relief or on WPA.—Check "Yes" or "No" to indicate whether at time of admission or review, any member of the family is receiving direct relief (either public or private), old-age assistance, mothers' and children's aid, pensions, etc., or is on WPA assignment.

Item 11. Principal provider.—Enter in item 11–a the age of the principal provider in the space denoting the sex of the person. Enter in item 11–b the specific occupation of the principal provider (e. g., carpenter's helper, machinist, waitress), and in item 11–c the industry in which employed (e. g., construction, steel manufacture, restaurant). Distinguish clearly between occupation and industry. For example, do not record occupation as "Building Construction" since this indicates industry but not occupation.

Item 12. Total actual net income past year.—Enter in item 12 the actual net income received during the past year. (This figure forms the basis for determining anticipated income for applicants or tenants, as the case may be.)

Item 13. Anticipated net family income.—Data in item 13 are to show the estimated income of the tenant for the coming year, that is, income during the past year adjusted for estimated changes during the coming year. The anticipated income from earnings from all sources should be entered in item 13–a; anticipated income from sources other than earnings should be entered in item 13–b. The total of these two figures should be posted in item 13–c. Any legal deductions anticipated should be entered in item 13–d. (Refer to Bulletin 22 on Policy and Procedure for definition of legal deductions.) Item 13–c minus item 13–d gives the net annual income which should be entered in item 13–e and also in item 3. This figure is the one which is used to determine the family's eligibility as far as income is concerned.

Item 14. Monthly statutory rental value of dwelling unit.—Enter the monthly statutory rental value of the dwelling unit in item 14.

Data in items 15 through 20 pertain to the housing conditions of the tenant *prior* to admission to the project. These items do not need to be filled in for supplementary reports.

Items 15 and 16. Number of rooms and number of persons housed.—The number of rooms occupied by the tenant family in its former living quarters should be entered in item 15 and the number of persons occupying such rooms should be entered in item 16. The entry in item 16 does not necessarily represent the same number of persons occupying a dwelling unit on the project site (item 6), since there may have been more than one family in the former quarters.

Item 17. Monthly rent paid.—The former monthly rent paid should be entered in item 17. This amount will include the utilities which are checked "Yes" in item 19.

Item 18. Monthly payment for utilities.—The monthly payments for utilities (water, electricity, gas, other fuels, and ice) are to be entered under item 18. Coal, wood, kerosene, gasoline, fuel oil, etc., are to be considered as "other fuels" for this report.

Item 19. Items included in rent.—Check "Yes" or "No" for each of the items to indicate whether or not such items were included in the rent.

Item 20. Facilities or conditions of previous dwelling quarters.—In item 20–a indicate "Need for Repairs" as none, minor repairs, major repairs, or unfit for use. Check "Yes" or "No" for each of the items 20–b through 20–h to indicate the facilities or conditions of the previous dwelling unit. It will not be necessary for the Project Manager to evaluate the previous housing facilities or conditions of the tenant, since such information will already be available in the project records for the family.

USHA 41
Rev. 12-2-39

FEDERAL WORKS AGENCY
UNITED STATES HOUSING AUTHORITY

REPORT ON PROJECT TENANTS

First report on tenant ☐
Supplementary report on tenant ☐
Date of report
Date premises occupied
Date premises vacated

State ____ City ____ Project No. ____

Item	Data	Code	Item	Data	Code
1. Name			9. Former resident of project site	Yes ___ No ___	
2. Dwelling number			10. Any relief or on WPA	Yes ___ No ___	
(a) Monthly rent paid by tenant			11. Principal provider:		
3. Total anticipated net annual income			(a) Sex and age	M ___ F ___	
4. Number of rooms in dwelling unit			(b) Occupation		
5. Race			(c) Industry		
6. Total number of persons in family	M ___ F ___		12. Total actual net income past year		
(a) Persons 21 years and over	M ___ F ___		13. Anticipated net family income:		
(b) Persons 16 to 20 years	M ___ F ___		(a) Total earnings		
(c) Persons 11 to 15 years	M ___ F ___		(b) Other income		
(d) Persons 6 to 10 years	M ___ F ___		(c) Total income		
(e) Persons 5 years and under	M ___ F ___		(d) Legal deductions		
7. Children attending public school			(e) Total net annual income		
8. Number of persons employed			14. Monthly statutory rental value of dwelling unit		

Item	Data	Code	Item	Data	Code
Previous housing data:			20. Conditions and facilities of previous dwelling quarters:		
15. Number of rooms			(a) Need for repair		
16. Number of persons housed			(b) Running water in house	Yes ___ No ___	
17. Monthly rent paid			(c) Inside private bath	Yes ___ No ___	
18. Monthly payment for utilities:			(d) Inside private flush toilet	Yes ___ No ___	
(a) Water			(e) Private cooking facilities with sink	Yes ___ No ___	
(b) Electricity			(f) Adequate and safe heating facilities	Yes ___ No ___	
(c) Gas			(g) Adequate and safe artificial lighting facilities	Yes ___ No ___	
(d) Other fuels (coal, wood, kerosene, gasoline, fuel oil, etc.)			(h) Natural light and adequate ventilation	Yes ___ No ___	
(e) Ice					
19. Items included in rent:					
(a) Heat	Yes ___ No ___				
(b) Furniture	Yes ___ No ___				
(c) Hot water	Yes ___ No ___				
(d) Cold water	Yes ___ No ___				
(e) Lighting	Yes ___ No ___				
(f) Cooking fuel	Yes ___ No ___				
(g) Mechanical refrigeration	Yes ___ No ___				
(h) Refrigerating fuel or energy	Yes ___ No ___				

INSTRUCTIONS FOR PREPARING NOTICE OF PREMISES VACATED

Notice of Premises Vacated, Form USHA 836, is to be used to record information pertaining to all vacancies which occur in each project during each month. This form is to be closely associated with the Report on Project Tenants, since tenants' cards will remain in the active file and the families will be considered as actually living on the site until a Notice of Premises Vacated is received. One original copy of this form should be forwarded monthly with other reports discussed in this Manual; carbon copies may be retained in the project files.

Column 1. Dwelling number.—The dwelling numbers of the units vacated during the month covered by the report should be indicated in column 1. These dwelling numbers are sometimes called "account numbers."

Column 2. Name of tenant.—Enter in column 2 the names of the tenants which vacated the dwelling units listed in column 1.

Column 3. Date vacated.—The respective dates on which the dwelling units listed in column 1 were vacated should be shown in column 3. If a particular dwelling is vacated twice during a calendar month, entries must be made on separate lines with the proper dates in order that the corresponding cards for the project tenants may be identified in the master file. A Report on Project Tenants must be prepared for the family which moves in even though such family vacates during the same month.

Column 4. Reason for vacating.—The specific reason for vacating must be entered in each case in column 4; for example, excess income, living too far from work, larger unit required, etc.

Columns 5 through 8. Location after moving.—Entry must be made either in column 5 or in columns 6, 7, and 8 for each tenant which moves during the month to indicate whether the family has moved off the project or has changed quarters within the project. If a tenant moves off the project site, a check should be made in column 5. If, however, the tenant moves from one dwelling unit on the project site to another, the dwelling number of the new unit must be entered in column 6; the number of rooms and the monthly rent paid in the new quarters should be entered in columns 7 and 8. For families moving from one unit to another on the same project, it is necessary to prepare a new form USHA 41, Report on Project Tenants, marking it as a supplementary report in the upper right-hand corner.

USHA 836
12-7-39

FEDERAL WORKS AGENCY
UNITED STATES HOUSING AUTHORITY

NOTICE OF PREMISES VACATED

State ________________ City ________________ Project No. ________________

Month of ________________, 19____

Dwelling No. (1)	Name of tenant (2)	Date vacated (3)	Reason for vacating (4)	Location after moving: Off project site (5)	On project site: Dwelling No. (6)	No. of rooms (7)	Monthly rent (8)

(Continue on reverse side for additional entries)

INSTRUCTIONS FOR PREPARING THE REPORT ON COMMUNITY ACTIVITIES, SERVICES, AND FACILITIES

ORGANIZED COMMUNITY ACTIVITIES AND SERVICES.

In this section, report all leisure-time, health, or welfare activities and services available to project residents, whether organized or conducted by the residents themselves, the management, or some outside public or private agency.

In column 1, report only organized activities with supervision of one type or another, do not report spontaneous informal activities. A morning, afternoon, or evening play area or playground session should be reported if supervision is provided, but not if supervision is lacking.

In column 2, report the age groups participating, such as "under 6," "6 to 10," etc.

In column 3, report the number of different groups participating in each activity. For example, in a softball tournament, each team should be counted as a group. In a preschool play center program, each group meeting in one center or in different centers should be counted separately.

In column 4, for each activity report the total number of meetings or sessions held during the period. Using the example of a softball tournament, each separate period set aside for playing off games would be considered one session regardless of the number of games played or teams involved during the period. The term "session" is used to describe a morning, afternoon, or evening period of activity, especially as related to playground or play area supervision. It may, however, indicate a shorter period or even a longer period as in the case of an all-day nursery school.

In column 5, report all those present during the meetings or sessions reported in column 4. Inasmuch as these are aggregate figures, the same persons obviously may be counted several times during the reporting period. Attendance figures for project residents should be reported in column 5A, those for nonresidents in column 5B.

In column 6, indicate the type of facility used for each activity, such as social room, craft room, outdoor preschool area, children's playground, meeting room, health clinic room, etc. If facility is located within the project enter in column 6A; if outside, in column 6B.

In column 7, indicate for each activity or service whether the leadership or supervision was provided by (*a*) the residents themselves (if by residents, indicate whether paid or volunteer); (*b*) the management (if by management, indicate title of personnel); (*c*) by the City Recreation Department; (*d*) by the WPA; (*e*) by the NYA; (*f*) by city health or welfare departments, etc.

MISCELLANEOUS INFORMATION.

Item 1. Self-explanatory.

Item 2. New equipment for community activities added during period.

Include under this item all equipment of a more-or-less permanent nature such as swings, slides, tables, chairs, clinical equipment, curtains, etc., used in connection with community activities. Do not include supplies such as softballs, basketballs, etc. Under the column "Where used," indicate the facility in which the equipment is used or installed.

Item 3. Relations with other public or private agencies in the community.

Report under this item all relations with municipal recreation, health, welfare, and education departments; private welfare, recreation, and health agencies; or other public and private groups concerned with community activities.

Item 4. New activities.

Under this item report all new activities initiated during the period or any extensions of already existing activities. Describe any difficulties or peculiar conditions in connection with their initiation and development.

USHA 839
12-11-39

FEDERAL WORKS AGENCY
UNITED STATES HOUSING AUTHORITY

COMMUNITY ACTIVITIES, SERVICES, AND FACILITIES

Name of project .... Project No. .... Period ending ....

City .... State ....

Submitted by .... Title ....

ORGANIZED COMMUNITY ACTIVITIES AND SERVICES

Activities and services	Age groups	Total number groups	Number meetings or sessions	Total Attendance		Type of Facility Used		Leadership provided by—
				Project residents	Nonresidents	Inside project	Outside project	
(1)	(2)	(3)	(4)	(5a)	(5b)	(6a)	(6b)	(7)

Project .... City .... State ....

MISCELLANEOUS INFORMATION

1. Changes in facilities during period. (Describe briefly, all changes in facilities for community activities, giving (*a*) former use, (*b*) new use, (*c*) alterations, and (*d*) reasons for change.)

(*a*)

(*b*)

(*c*)

(*d*)

2. New equipment for community activities added during period.

Type of equipment *Where used*

(*a*)

(*b*)

(*c*)

(*d*)

3. Relations with other public or private agencies in the community. (Describe each contact, giving (*a*) name of agency, (*b*) assistance received, and (*c*) how assistance was obtained.)

(*a*)

(*b*)

(*c*)

4. New activities. (Describe briefly each new activity initiated during the period, giving (*a*) name of activity, (*b*) how it started, (*c*) major difficulties involved, and (*d*) present state of development.)

(*a*)

(*b*)

(*c*)

(*d*)

INSTRUCTIONS FOR PREPARING THE OPERATION AND MAINTENANCE MONTHLY REPORT

This Form USHA 837 is made uniform for all projects and contains spaces for data which may not be obtainable at certain projects. The form is to be filled out as completely as practicable.

City.

This is the city or town in which the project is located. The State should be indicated also.

Name of project.

The name by which the project is designated including the designating number as H–1502 or KY–1–1.

Month of.

Refers to the calendar month irrespective of how many days may be in it.

Degree days for heat.

To obtain the degree days for the month it is necessary to have the maximum and minimum outside temperatures, Fahrenheit, for each day. These may usually be obtained from local newspapers. Or a maximum and a minimum thermometer may be used at the project and so located as to give outside shade temperatures. For each calendar day the maximum and the minimum temperatures are to be added together and the sum divided by 2. If the average is greater than 65, it is to be ignored, and not included in the following computations. If the average is less than 65, then it is to be subtracted from 65. The amount of the difference is known as the degree days for that day. The degree days for the month is the total of the degree days obtained in that month. Indicate first the degree days for the month and then in the column under Budget, indicate the degree days allowed in the budget.

B. t. u. of fuel.

The B. t. u. of the fuel may usually be obtained from the vender. Under special circumstances, it will be obtained by running laboratory tests. If reasonably reliable figures cannot be obtained it is best to omit giving any figures on the monthly report.

Cost of fuel.

The figure to report for the cost of fuel may be obtained from the bills received for fuel during the month of this report. When fuel costs vary to an appreciable extent, this figure will not necessarily represent the value of the fuel either received or consumed during the month. It will, however, supply a record which will be useful in studying fuel costs. The figure given in the "Actual" column should be the cost of the fuel "delivered to the project" including hauling charges. In the budget column the estimated cost of fuel in the current budget should be indicated.

Fuel received.

This item should be the weight or quantity of fuel received at the project during the month.

Fuel consumed.

Figures for the quantity of fuel consumed should be as accurate as can be obtained from the kind of equipment which is available to determine the amount. The budgeted quantity should also be indicated.

Kind of fuel.

For gas, indicate whether natural or manufactured, or if a combination of the two. For oil, indicate the weight of oil usually by numbers, i. e., 6 or 4. For coal, indicate the sizing such as 1½-inch nut and slack, air-cleaned, etc. If it is possible to obtain the name of the mine from which the coal is produced, this should be indicated as it will then be possible, in many cases, to refer to the elaborate records of the Bureau of Mines and determine many factors concerning the coal in question.

Amount of steam produced.

Where the quantity of steam produced is measured either by steam meters or by recording the quantity of feed water, the amount produced should be given. If no metering equipment is available, do not record an estimated figure.

Average steam pressure at boiler.

This should be the average pressure for the period of time that pressure is being maintained. Where the pressure is allowed to drop to practically zero for the night period or for several days in the month the reduced pressures should not be averaged with the normal operating pressures.

Temperature of boiler feed water.

Report the average temperature of the boiler feed water in degree F.

Quantity of boiler makeup water.

Only metered quantities should be reported.

Temperature of city water.

Report the average temperature for the month. Periodically representative samples of city water can be drawn into a pail and the temperatures taken for computing the average.

Temperature of hot water.

This is to be the average of temperatures taken while water is being heated.

Hot water per family.

Reports should be based on metered quantities and not on estimates. Also indicate the amount of hot water per family which was computed in the budget.

Number of families hot water metered.

In many projects, only a few meters are available to measure the quantity of water converted into domestic hot water. These, however, are intended to furnish data which will represent the practice at the project and it is required that the number of families for which water is metered be recorded.

Boiler inspections by insurance company.

We wish to have a record of the dates and types of inspections (internal and external) which are made by the insurance company.

Purchased utilities.

It is intended that the data requested for the purchased utilities including water, gas, and electricity be obtained from the bills rendered for the utilities. It is not expected that special meter readings will be made for the purpose of this report.

Billing period.

The billing period dates should be indicated on the report. In many projects the billing periods are not for calendar months and it is requested that the reports concern the bills received during the month. For instance, water may be billed quarterly which will result in the record for water appearing only in every third monthly report.

Average cost per unit.

From the bills, the average cost per unit (per gallon, cubic foot, and kilowatt-hour) should be figured by dividing the total cost, including any discounts or surcharges, by the quantity purchased.

Total quantity billed.

The quantity of the utility such as number of gallons, cubic feet, or kilowatt-hours should be indicated, rather than the value.

Quantity budgeted for period.

This should indicate the quantity of the utility included in the current annual budget for the billing period. If the billing period is not for a calendar month, then the quantity for the budgeted period should be obtained by proration from the monthly budgeted amounts.

Note the physical condition.

Comments should be made on the physical condition of the plumbing, gas, electrical, and heating systems and of the ranges, refrigerators, and other equipment indicating in particular the major repairs, replacements, or alterations which must be considered in the near future.

Exterior painting.

Show in the tabulation the number of each of the items painted during the month and the length of time to the nearest half year which has elapsed since they were last painted. In counting steel frames and sash consider each masonry opening as one unit. Steel screen frames are included with the sash. A window consisting of either a fixed or double-hung wood sash is to be counted as one. Wood window screens are listed separately. The items doors and frames and door screens are self-explanatory.

Other exterior painting.

In this space should be listed the other exterior work such as porch floors, cornice trim, gable ends, etc. The time since last painted should also be indicated.

Interior painting and decorating.

In the tabulation show the number of each type of room painted either by project-paid labor or by tenants during the month. Many times walls and ceilings will be treated separately from trim so that space is given for the reporting of each. If walls and ceilings of a room are not painted at the same time then this fact should be noted under "Remarks on Interior Painting." Trim includes baseboards, windows, doors, shelves, etc. If the trim is varnished, oiled, waxed, or treated by other than paint then the fact should be noted under remarks. The number of rooms painted on schedule should be reported separately from the number painted as a result of turnover.

Remarks on interior painting.

In this space comment on any unusual circumstances in connection with the interior painting program as well as the items noted in the subject above.

Remarks on physical condition of the structures.

Major repairs and replacements which have been made should be noted and comments should be made on conditions which will require major repairs, replacements, or alterations in the near future.

Replacement of surfaced ground areas.

Major repairs to or the replacement of surfaced areas such as concrete walks, drives, wading pools, etc., should be indicated, giving also the extent of the work done—that is the number of square feet of surface treated.

Replacement of equipment and plant materials.

The amount of replacements required during the month of wire fence, clothes posts, benches, guard rails, lawn mowers, and hose should be shown as well as the average useful life of the items discarded. Comments should be made on the replacement of trees and landscape shrubbery. Where large areas of turf are replaced, a record should be made of this also.

Pounds of fertilizer.

Indicate the amount of fertilizer delivered to the project during the month.

Pounds of grass seed.

Indicate the amount of grass seed received during the month.

Number of times grass cut.

Indicate as nearly as practicable the average number of times that the grass was cut by project labor during the month. Some areas may be cut more often than others so it may be necessary to make an estimate of what would be considered an average for all areas cut.

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FEDERAL WORKS AGENCY
UNITED STATES HOUSING AUTHORITY

Project No. ____________

OPERATION AND MAINTENANCE MONTHLY REPORT

City ____________ Name of project ____________ Month of ____________, 19____

ITEM	ACTUAL	BUDGET	ITEM	ACTUAL	BUDGET
Degree days for heat			Average steam pressure at boiler	lb.	
B. t. u. of fuel			Temperature of boiler feed water	°F.	
Cost of fuel			Quantity of boiler makeup water		
Fuel received			Temperature of city water	°F.	
Fuel consumed			Temperature of hot water	°F.	
Kind of fuel			Hot water per family		
Amount of steam produced	lbs.		Number families hot water metered		

BOILER INSPECTIONS BY INSURANCE COMPANY

Inspection		Number of Boiler
Date	Type	

PURCHASED UTILITIES

Utility	Billing Period	Average Cost Per Unit	Total Quantity Billed	Quantity Budgeted for Period
Water		$		
Gas				
Electricity				

Note the physical condition of all parts of the plumbing, gas, electrical, and heating systems, and of the ranges, refrigerators, and other equipment.

EXTERIOR PAINTING

	Steel Frames and Sash	Wood Frames and Sash	Wood Screens	Doors and Frames	Door Screens
Number painted					
Period since last painted					

Other exterior painting:

INTERIOR PAINTING AND DECORATING

Period since last painted					

Other exterior painting:

INTERIOR PAINTING AND DECORATING

		Living Rooms		Kitchens		Bed Rooms		Bath Rooms		Stair Halls	
		Walls and Ceilings	Trim	Walls and Ceilings	Trim	Walls and Ceilings	Trim	Walls and Ceilings	Trim	Walls and Ceilings	Trim
Number painted on schedule by—	Tenants										
	Project										
Time since last painted											
Number painted on turnover by—	Tenants										
	Project										

Remarks on interior painting:

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Structure—Remarks on physical condition of structures listing major repairs:

Grounds—Replacement of surface ground areas giving extent:

Replacement of equipment and plant materials:

Pounds fertilizer .... Pounds of grass seed .... Number times cut ....

INSTRUCTIONS FOR PREPARING THE DISTRIBUTION OF LABOR MONTHLY REPORT

City.

This is the city or town in which the project is located. The State should be indicated also.

Name of project.

The name by which the project is designated, including the designating number as H–1502 or Ky–1–1.

Month of.

Refers to the calendar month irrespective of how many days may be in it.

Item 1. Name.

The names of the employees appearing on the pay roll should be given. All of the time of a central office for which a charge is made to a project shall be reported—subdivided into the different classifications. This should be reported under the single name "Central Office." All labor performed on contract at a project shall be reported under the name of the contractor.

Item 2. Wage rate.

Report the wage rate in the form usually used at the project, i. e., hourly, daily, weekly, monthly, or yearly. In some cases an employee will work on different jobs at different rates. In such cases the different rates should be shown rather than an average. No wage rate for a central office need be reported. If possible an hourly wage rate should be computed for labor which is contracted. This rate is to be computed by subtracting the estimated cost of materials supplied on the contract from the total contract cost and dividing the difference by the number of hours of work performed on the project.

Items 3–23. Time distribution.

The actual hours worked in the different classifications should be reported. The total opposite any name should be the total hours for which pay was received during the month. For central office and for the labor on each contract the total time shall be shown opposite "Central Office" and the contractors' names.

Items 3–9. Management.

The seven subdivisions under this head are made for the purpose of this report and do not appear in the Classification of Accounts. The breakdown of time may be obtained from daily records kept by each employee or from weekly or monthly reports based on estimates made by the employee. Time spent on clerical and stenographic work should be distributed to the different classifications on the form. The Classifications under Management may be defined as follows:

Item 3. General supervision.

This includes the time chargeable to general executive functions incidental to the supervision of other employees.

Item 4. Operation and maintenance supervision.

The supervision of the operation and maintenance work in the smaller projects may be done by men who spend part of their time doing manual labor. In such cases an estimate should be made of the time spent on duties of a supervisory nature to be charged to operation and maintenance supervision.

Item 5. Accounting.

This includes the time chargeable to bookkeeping and accounting (including leave and personnel records but excluding purchasing).

Item 6. Purchasing.

This includes time chargeable to procurement and recording of materials, supplies, and equipment (include storeroom clerical service).

Item 7. Leasing.

This includes time chargeable to tenant selection, renting, determining eligibility for continued occupancy, and handling of tenant complaints and service requests.

Item 8. Rent collection.

This includes time chargeable to collection of rents including time of cashier when receiving and receipting for rents, time required to prepare and deliver statements, time required for conferences and other action in working out individual cases of arrears. (Do not include time chargeable to assisting and encouraging tenants in group activities designed to raise economic stability of the tenant body such as credit unions and employment centers.)

Item 9. Public relations.

This includes time chargeable to activities designed to explain and demonstrate public housing such as showing the project to visitors and talking before luncheon clubs, etc. (Exclude and charge to "Leasing" time chargeable to activities designed primarily to obtain eligible applicants.)

Items 10–21.

The labor chargeable to these items is defined in the Classification of Accounts under similar headings in the Manual of Instructions of Accounting Procedure.

Item 22. Miscellaneous.

Under this heading include the sum of the following items which are defined in the Classification of Accounts: Exterminating, watchmen expense, R M & R for the elevator system and other equipment.

Item 23. Leave.

Under this heading post all the time during which the employee was absent with pay. This includes vacation and sick leave but not compensatory time for overtime.

Remarks.

Under remarks at the bottom of the form note the amount of overtime worked for which remuneration is not given. Overtime which can be balanced by a corresponding amount of time off with pay should not be listed.

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Project No.________________

FEDERAL WORKS AGENCY

UNITED STATES HOUSING AUTHORITY

DISTRIBUTION OF LABOR MONTHLY REPORT

City ______________________ Project ______________________ Month of ______________________, 19____

Name	Wage Rate	REPORT TIME DISTRIBUTION IN HOURS																				
		Management											Repair, Maintenance, and Replacement									
		General supervision	O. and M. supervision	Accounting	Purchasing	Leasing and occupancy	Rent collection	Public relations	Community	Janitorial	Refuse removal	Heat operation	Grounds	Structures	Painting	Plumbing	Electrical	Heating	Ranges	Refrigerators	Miscellaneous	Leave
(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)	(10)	(11)	(12)	(13)	(14)	(15)	(16)	(17)	(18)	(19)	(20)	(21)	(22)	(23)

Remarks including a note on unpaid overtime:

INSTRUCTIONS COVERING THE USE OF THE REPORT ON MANAGEMENT PROBLEMS

General.—The purpose of the "Report on Management Problems" is to permit the housing project manager, or designated members of the management staff, to submit statements on situations or conditions which have presented special or unexpected problems in project management. No type of problem should be excluded, whether or not it has been satisfactorily solved.

A separate form should be used for each problem reported. If a single sheet is insufficient, a second sheet should be used and attached to the initial sheet.

Specific.—In the spaces provided to the left at top of the form, enter the name of the project and the city and State in which it is located.

In part I of the main section of the form describe the problem, relating its duration, scope, and seriousness.

In part II of the main section of the form give a specific description of the cause or causes which gave rise to the problem. Be specific and complete in reporting the cause. If the difficulty arose from an unsatisfactory detail of site plan, building design, or construction, report the exact nature of that detail. Similarly, if a type of equipment, a management practice or procedure, or a characteristic or condition of the tenant group, the neighborhood or the community created the problem described in part I, describe the cause in detail.

In part III describe the method employed in attempting to solve the problem, and state the degree to which it was successful. If more than one attempt was made, describe the methods employed in each. If the problem is new or for some other reason unsolved at the time of this report, describe the plan which is expected to solve it.

At the bottom of the form enter on the line to the left the title of the person or persons providing the information given in the main section of the report (e. g. "Maintenance Superintendent," "Tenant Relations Counsellor," "Assistant Management Aide," "Manager," "Manager and Staff," etc.). At the bottom of the form the manager shall enter his signature on the line provided to the right of the form and the date of his approval of the report.

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FEDERAL WORKS AGENCY

UNITED STATES HOUSING AUTHORITY

REPORT ON MANAGEMENT PROBLEMS

Name of project .... Project No. ....

City .... State ....

I. The problem:

II. Cause, or causes:

III. Solution, or attempts to solve:

Title of person or persons providing above information: ....

....

Approved: ....
Manager.

Date ....

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