ATTACHMENT A

I) BASIC ISSUES

II 1) SAFETY & SECURITY

2) HEALTH & HYGIENE

3) MAJOR MAINTENANCE & CAPITAL IMPROVEMENTS

4) TENANTS' RIGHTS & EXPECTATIONS

5) MANAGEMENT POLICIES

JOHN VAN SAUN
2 MT AUBURN ST TENANTS
ASSOCIATION (40T)
(PRELIMINARY POSITION PAPER)

10.25.12
DRAFT 2

I. BASIC ISSUES

• BUILDING CANNOT BE RUN AT AN ACCEPTABLE LEVEL OF NET REVENUE IF ALL COSTS AND EXPENDITURES ARE ACCURATELY ASSESSED. AT PRESENT, THE OMISSION AND/OR DELAY OF WHAT ARE, OR WILL BE COME SHORTLY, MAJOR FUNDING REQUIREMENTS PROVIDES A MISLEADING FINANCIAL PICTURE OF THE BUILDING'S OPERATING REALITY, FINANCING REQUIREMENTS, AND FUTURE CONDITION.

• GROSS INCOME (FIXED OR REDUCED - PROGRAM UNCERTAINTIES: FISCAL CLIFF, SEQUESTRATION, ETC)

MINUS

- > OPERATING EXPENSES
- > MAJOR MAINTENANCE
- > CAPITAL IMPROVEMENTS
- > CONTINGENCY SETASIDES
- > INTEREST
- > TAXES
- > DEPRECIATION
- > AMORTIZATION

UNSTATED, MISSED, UNDERSTATED, WILL SHARPLY INCREASE (AGING OF TENANT POPULATION, AND BUILDING)

EQUALS NET REVENUE (LOSS)

>

• THE PRESENT MANAGEMENT (WINN) POLICY OF "COST CONTAINMENT" IS ONE THAT FALLS ON TENANT ESSENTIAL SERVICES. THIS IS UNACCEPTABLE, AND MUST CEASE AS PART OF DETERMINING THE BUILDINGS FUTURE. POTENTIAL OWNERS MUST RECEIVE A FULL, ACCURATE, AND INDEPENDENT AUDIT AND OPERATING REVIEW OF THE BUILDING.

2 MT. AUBURN ST. TENANTS ASSOCIATION (40T)

I INTRO

II HISTORY

III 3 GUIDELINE CATCH PHRASES: SPECIFICS FOR EACH

IV FINANCIAL FRAMEWORK. OBSERVATIONS

V CONCLUSIONS - STAKEHOLDERS \ SHAREHOLDERS; HANDS-ON \ OFF
BUDY ON \ DIRTY HANDS END ON JRR TEAM PRAISE.
SUPER SR FACILITY - APT-ASST-NH-INT CARE \ AU EQUN 1~~X~~6 - ~~X~~61
62-97:42. FISCAL CLIFF; SEQUESTRATION; BOOMERS
2 YRS OF 20 YR COHORT IN RETIREMENT

3 BROAD GUIDELINES

1) LIFE ESTATE
2) RETURN TO BEST PRACTICES
3) BIOLOGY FIRST

1) LIFE ESTATE → THE END OF ANXIETY

- IDEAL SECURE UNTIL VOLUNTARILY LEAVE OR DIE
- CLOSEST: SUBMISSION OF A RECORDED USE RESTRICTION WITH THE REGISTRY OF DEEDS. IT WOULD ESTABLISH

MAP SECTION 8 CONTRACT SEC 1(C)ii(3)(4)

> ZMTA AS AN AFFORDABLE HOUSING SITE FOR THE ELDERY & DISABLED FOR 30 YEARS
> MAINTAIN THE CURRENT TO RENT CONTRIBUTION AT 30% OF TENANT QUALIFIED INC.
> MAINTAIN THE CURRENT 60% AMI, ALL UNITS
> GUARANTEE RIGHT OCCUPANCY TO EXIST. TENANTS AT THE TIME THE CONTINUED OPERATION OF THE BUILDING SHOULD BECOME UNTOWN-ECONOMIC, THUS NECESSITATING AN OVERALL ADJUSTMENT TO RENTAL STATUS.

- SEC 8 RENEWAL
  > HU EXPLICITLY COMMIT TO AFF & E&D.
  > CONTRACT BE RENEWED FOR 30 YRS ON A 15+15 BASIS
  > ACKNOWLEDGEMENT THAT A CHANGE IN FUNDING OR ABOLISHMENT OF THE PROGRAM WILL NOT ALTER OBLIGATIONS UNDER THE PROPERTIES RECORDED USE RESTRICTION AGREEMENT

III 3 BROAD PRINCIPLES

• NO HOPSCOTCHING

A SERIES OF SHORT TERM CONTRACTS TO ACCOMMODATE A FAILURE TO COMPLETE A SALE BY 10.31.13 BE DISALLOWED

III 2) RETURN TO BEST PRACTICES

> • HANDS ON \ BODY-ON MANAGEMENT STYLE - ONE EXHIBITS THE HABIT ACTION & CLEAR NEED TO GET THINGS DONE. MAINTAINANCE STAFF EXEMPT, ENCUMBERED BY BUREAUCRACY.

> • PRIORITY BUDGETING - SECURITY OVER 1C PARTIES; MAJ MAINTENANCE & CAPITAL IMP NEEDS WILL EXHAUST $.

* • DEFERRED MAJ MAINT & CAP IMP HAS BEEN MASSIVE. PAY PRICE

* MIDDAM SHUT DOWN WATER

* PLASTIC SHEETS ON WINDOWS - 1950s

* FIRE VIOLATION UNADDRESSED EMRG DOORS, STAIRWELLS

* ELEVATORS

* WIRING BEHIND STAINLESS STEEL PANELS

11 PAGES

> CHA TYPE INSPECTIONS W STANDARDIZED CHECKLIST & PROTOCOL

> UPGRADING & INSPECTION OF INDIVIDUAL APT HEALTH EMERGENCY ALARMS;

> 24\7 DIRECT CONTACT W. OWNER\MANAGER EQUIVALENT TO HU

FINANCIAL FRAMEWORK

> CANNOT SEPERATE MAJOR MAINTENANCE & CAP REQUIREMENTS FROM THE SALE PROCESS. CONTRARY TO WHAT SOME HAVE SAID, THE ABSENCE OF THEIR INCLUSION FULLY & ACCURATELY CREATES A "BLACK HOLE" AND DENIES A "LEVEL PLAYING FIELD" TO ALL PARTIES.

* MORE IMPORTANT, FAILURE TENANTS WILL NOT BE THE SHAVINGS LEFT ON THE SHOP FLOOR TO FIT A SQUARE PEG OF A SUCCESSFUL BID PRICE INTO /THE/ THE ROUND HOLE OF AN ASKING MINIMUM.

SEQUESTRATION, FISCAL CLIFF, SECULAR WORSENING A PUBLIC FINANCES GENERALLY.

> "ACING IN PLACE" AS AMERICA TENDS TO DISCOVER, IS FRAUGHT W/ UNINTENDED CONSEQUENCES - THE EVOLUTION OF ZMTA IS AN EX. 52-97; AS HU CONTEXT 16-61. ZMTA IS A SUPER OR END-TO-END E&D FACILITY BY VIRTUE OF BIOLOGY; THIS MUST BE ACKNOWLEDGED AND PAID FOR. TENANTS HAVE STANDING.

SUBGROUP PRINCIPLES

III (3) BIOLOGY FIRST

• PEOPLE ARE AGING. COMMITMENT IS IMPLICIT IN E&D HOUSING. STATUS OF E&D IS NECESSARILY UNANGINE & DYNAMIC – ITS THE HUMAN CONDITION. THE STATUS OF TENANT IS BY DEFINITION FIXED & STATIC ITS A LEGAL CONSTRUCT.

• LDN AS MODEL. IT WILL BE COSTLY; IT IS NECESSARY.

V FUTURE – FULL PROFESSIONAL NEW. BETTER ANGELS OF CREATIVITY & WELCOME. TRANSPARENCY & INCLUSION BUZZ WORDS 2008 BLUEST OF BLUE CITIES. NOW TIME HAS COME – BETTER ANGELS BUT ALL OF THE ANGELS

2 MT AUBURN ST. TENANTS ASSOC (40T)

RISK	UNCERTAINTY OF FUTURE FUNDING	
WHY	CRISIS IN NATIONS NEAR AND LONG TERM FINANCES — THE DEBT, DEFICIT, BUDGET, DEBT CEILING, INTEREST PAYMENTS, MEDICARE SOCIAL SECURITY, RETIREMENT OF BABY BOOMERS.	
WHO IS EXPOSED?	•SALE AS IS TENANTS	•SALE AS WE WILL WORK FOR HARVARD, CAMBRIDGE, NEW OWNER
PROTECTIONS THE TERMS	•SEC 8, LEASE	•INDIVIDUAL "LIFE ESTATE" SECTION 8, LEASE
THE BUILDING	OWNER, MANAGER WIDE DISCRETION: AVOIDANCE OF AGEING	•RETURN TO BEST PRACTICES LBJ AS STANDARD; INDEPENDENT OVERSIGHT BOARD; FIXED RULES. ACCEPTANCE OF AGEING
THE PEOPLE GOAL	UNITS FIRST	"BIOLOGY FIRST"
	COMMITMENT TO 94 AFFORDABLE UNITS AVAILABLE TO THE ELDERY & DISABLED. AVOIDANCE OF AGEING	COMMITMENT TO 94 ELDERLY AND DISABLED INDIVIDUALS IN AFFORDABLE UNITS. THE LBJ STANDARD. ACCEPTANCE OF AGEING. PEOPLE GROW OLD

II | SAFETY AND SECURITY | 1

- GUARD SERVICE: RETURN OF SECURITAS; 8H\D; 7D\WK
- ANSWERING SERVICE 24\7 LIVE ACCESS TO MANAGEMENT PERSONNEL
- ELIMINATION OF USE OF ANSWERING SERVICE DURING NORMAL BUSINESS HOURS
- INSTALLATION OF KNOX BOX WITH BUILDING MASTER KEY TO APARTMENTS AND 16 INDIVIDUAL KEYS FOR UNITS WITH SECOND, DEADBOLT LOCK (16 UNITS HAVE DEADBOLTS IN USE; 37 OF 94 DOORS ARE DEADBOLT USEABLE)
- GARAGE LIGHTS ON PRE-DUSK TO DAWN SCHEDULE (GARAGE IS NATURALLY DARK THROUGHOUT DAY)
- CAMERAS REPAIRED AND ROUTINELY SERVICED
- CAMERA INSTALLED IN COMPUTER ROOM AND COMMUNITY ROOM
- CAMERAS INSTALLED ON INDIVIDUAL FLOORS
- FIRE DOUBLE DOORS AND INDIVIDUAL STAIRWELL DOORS BE MADE CODE COMPLIANT - PRESENT HARDWARE BE REPLACED BY PUSH-PLATES AND PISTOL HANDLES (521 CMR: ARCHITECTURAL ACCESS BOARD. PRESENT VIOLATION WAS NOTED BY CAMBRIDGE FIRE DEPARTMENT, ISD, AND CAMBRIDGE COMMISSION FOR DISABILITIES, AND APPROVED FOR IMMEDIATE CORRECTION - DAVID DOWER - IN JAN 2008.)
- ALL PIPE HOLES FILLED
- EXPLICIT EMERGENCY AND FIRE ROUTINES BE DEVELOPED, COMMUNICATED, AND ROUTINELY REVIEWED

- THE RETURN OF ANNUAL FIRE DRILLS
- INSTRUCTIONS ON USE OF INDIVIDUAL FLOOR FIRE EXTINGUISHERS
- THE DEVELOPEMENT BY MANAGEMENT OF FULL HEALTH (DISABILITIES, MOBILITY LIMITATIONS, LANGUAGE CHALLENGES, ETC) PROFILES FOR REFERENCE IN EMERGENCIES, WITH FULL MEDICAL CONTACT INFORMATION, FOR EACH TENANT.
- INSTALLATION OF NIGHT LIGHT(S) IN COMMUNITY ROOM
- COMPUTER ROOM HOURS ENFORCED
- REPLACEMENT/REPAIR OF EMERGENCY LOCK TO REAR STAIRWELL DOOR (DOOR IS NOW UNALARMED AND OPEN TO GARAGE)
- ROUTINE SENDING OF ZERO-TOLERANCE FOR THEFT (PROSECUTION AND EVICTION) NOTICE.
- MAIL AREA SIGN ("NOTICE", "ATTENTION") OF ZERO TOLERANCE POLICY
- RECORD OF ALL FIRE DEPARTMENT, EMS, AND POLICE ENTRIES WITH FOLLOWUP INFORMATION ON CIRCUMSTANCES.
- ADJUSTMENT (MOVE DOWN ~8") OF 220V KITCHEN STOVE WALL MOUNTED OUTLET BOXES. (ORIGINAL POSITION TOO HIGH TO ALLOW NEW STOVES TO BE FLUSH WITH BACK WALL; LEAVES 5-6" GAP. CODE VIOLATION)
- RETURN OF WEEKLY INSPECTIONS OF ALL PUBLIC AREAS BY PROPERTY MANAGER

- IMMEDIATE NOTIFICATION OF ALL TENANTS OF ANY BREAKDOWNS (CAMERAS, LOCKS, ETC) OR CHANGES TO BUILDING SECURITY
- ELECTRONIC TIME\DATE SWIPES ON EACH FLOOR FOR RECORDING OF ROUNDS BY SECURITY GUARDS
- CAMERA SYSTEM SERVICE CONTRACT
- PRECISE, EXPLICIT, STRICT BASIC SECURITY GUARD ROUTINE, ESPECIALLY TIME.
- INSPECTION (NOW STOPPED) OF TWO PERSONAL EMERGENCY SWITCHES IN EACH APARTMENT
- ROOF AND ELEVATOR ROOM DOOR KEYS IN KNOX BOX
- DOOR OPENING MECHANISMS REPLACED.
- OLD LOBBY 24\7 EMERGENCY TELEPHONE TO MANAGEMENT REINSTALLED; ESPECIALLY NEEDED FOR LOCK-OUTS.
- EXHAUST\VENTILATION DUCTS UNCLOGGED, DECREASED, AND CLEANED. MOTORS REPAIRED (NOISE, GRINDING). VENTS (BATHROOM & KITCHEN) CLEANED, DECREASED

2. HEALTH & HYGIENE

- RATS, MICE, AND BED BUGS. PAST NEGLECT HAS MADE PROBLEM ENDEMIC. MUST BE ADDRESSED BY RETENTION OF A PROFESSIONAL PEST CONTROL SERVICE.
- EXTERMINATION PROCEDURES MUST BE ROUTINE, FREQUENT AND MANDATORY.
- PIPE HOLES FILLED
- GUARD LOG SHOULD RECORD ALL COMPLAINTS OF RATS AND MICE (CURRENTLY THEY HAVE BEEN INSTRUCTED NOT TO DO SO)
- "HOUSEKEEPING ISSUES" FOUND DURING ANNUAL INSPECTIONS MUST BE DEALT EXPLICITLY AND ROUTINELY, WITH CONSEQUENCES. INDIVIDUAL UNIT NEGLECT SPREADS TO OTHER APARTMENTS.
- WHERE A TENANT REQUIRES ROUTINE ASSISTANCE WITH HOUSEKEEPING, IT SHOULD BE PROVIDED. ("SELF CARE" – THAT IS ITS LIMITATION OR INABILITY IS LISTED IN THE CAMBRIDGE CITY'S STATISTICAL WEBSITE AS A DISABILITY FOR THE ELDERLY)
- DIRTY, SMELLY TRASH ROOMS AND CARTS MUST BE CLEANED.
- WET TRASH PLACED IN INDIVIDUAL TRASH ROOM CARTS CANNOT BE ELIMINATED; NOTICES THAT IS NOT ALLOWED NONETHELESS SHOULD BE ROUTINE.
- ELIMINATION OF OPEN TRASH CAN IN GARAGE (RATS)
- BREAK-IN PROCEDURES WITH CAMBRIDGE FIRE DEPARTMENT SHOULD BE UPDATED (CAPT. THOMAS CAHILL) IN LIGHT OF APARTMENTS WITH DEADBOLT AND LOCKS.
- APARTMENTS SHOULD BE PAINTED AT LEAST EVERY SEVEN YEARS. DUST PROBLEM FROM OLD PAINT

3. MAJOR MAINTENANCE & CAPITAL IMPROVEMENTS

- EXTERIOR WALL CRACKS AND BREACHES.
- WINDOWS REPLACED
- PIPE HOLES
- CRACKED INTERIOR OUTSIDE WALLS IN APARTMENTS
- BANGING CAUSED BY AIR (OTHER DEFECTS?) IN HOT WATER HEATING PIPES
- DETACHED HOT WATER HEATING PIPES
- OLD APPLIANCE REPLACEMENT
- ELEVATOR MODERNIZATION OR REPLACEMENT
- ROUTINE CLEARING OF COMMUNITY ROOM TO ALLOW FULL USE.
- SHADES ON COMMUNITY ROOM LARGE WINDOWS
- CLOSING OF GAPS BETWEEN APT INTERIOR WALLS AND CEILINGS
- COMPLETION OF ASBESTOS REMOVAL
- SEVEN YEAR APARTMENT PAINTING SCHEDULE
- MODERNIZATION OF HEATING SYSTEM (INSUFFICIENT HEAT)
- COMPLETION OF INSTALLATION OF BATHTUB SUPPORT BARS; INSTALLATION OF TOILET SUPPORT BARS
- HALL EMERGENCY DOORS & STAIRWELL DOORS MADE CODE COMPLIANT — PUSH PLATES & PISTOL HANDLE (NON-MOVING)
- REPAIR OF ALARM AND LOCK ON REAR STAIRWELL OUTSIDE DOOR
- DECISION ON REMOVAL OF DEADBOLT LOCKS (16) AND DEADBOLT READY OPENINGS (41) OR IMMEDIATE PROVISION OF ADDITIONAL KEYS FOR FIRE DEPARTMENT USE (KNOX BOX)
- INSTALLATION OF KNOX BOX

4) TENANTS RIGHTS AND EXPECTATIONS

- TENANTS ARE TO BE TREATED WITH RESPECT, COURTESY, RECEPTIVITY, AND PARTICULAR REGARD FOR THEIR LIMITATIONS.
- THEIR DIGNITY AND SENIORITY WILL NOT BE IGNORED OR ABUSED.
- THE PROPERTY MANAGER ESPECIALLY SHALL BE HELD TO THESE REQUIREMENTS
- TRUTHFULNESS, ACCURACY, AND TIMELINESS ARE INVIOLATE. TENANTS ARE NOT TO BE MISLED OR "KEPT IN THE DARK".
- LIMITATIONS EXIST. THEY SHOULD CLEARLY AND POLITELY STATED.
- RESPECT FOR PRIVACY IS PARAMOUNT: 2 FULL BUSINESS DAYS NOTICE SHALL BE PROVIDED FOR NON EMERGENCY REPAIRS AND ENTRIES: THIS PRACTICE WAS STANDARD IN THE PAST. THE RESPONSIBILITY OF APPROPRIATE PLANNING AND TIME-TASK DISCIPLINE IS A REQUIREMENT OF THE PROPERTY MANAGER'S POSITION.
- ROUTINE (MONTHLY) TENANTS MEETINGS WITH THE PROPERTY MANAGER & STAFF
- ON-LINE RENT PAYMENT
- WITH ANSWERING SERVICE, THERE WILL BE A ONE HOUR (OR LESS) LIVE RETURN CALL BY APPROPRIATE STAFF
- FAXES WILL BE ELIMINATED; TENANT MESSAGES WILL RELAYED BY VOICE AND EMAIL.
- TENANT EMERGENCY INFORMATION SHOULD BE KEPT, WITH PROCEDURES FOR ITS USE MADE CLEAR.

4. TENANTS RIGHTS AND EXPECTATIONS

- ZERO TOLERANCE FOR THEFT; ASSURANCE THAT MANAGEMENT WILL ACT.
- PROMPT NOTIFICATION OF ALL CHANGES IN THE BUILDINGS STATUS
- REISSUANCE OF UPDATED BUILDING HANDBOOK.
- CLEAR, UP-TO-DATE INFORMATION ON ALL EMERGENCY PROCEDURES.
- ENFORCEMENT OF "RIGHT TO QUIET AND PEACEFUL" USE OF ONES APARTMENT.
- ONGOING UPDATES ON CONTAINMENT OF RATS, MICE, AND BED BUGS

5. MANAGEMENT

- "RESIDENTS FIRST" MEANS "BIOLOGY FIRST". MANAGEMENT MUST NOT IGNORE THE FACT THAT THE BUILDING IS AGING — 3 BUILDINGS 1. APARTMENT BUILDING; ASSISTED LIVING; NURSING HOME WHEN SEEN FROM PERSPECTIVE OF PHYSICAL AND MENTAL STATE OF TENANTS
- BUDGET DISCIPLINE; STRICT PRIORITY FUNDING — SECONDARY OUTLAYS MUST BE POSTPONED TO COVER PRIORITIES. DECREASING SECURITY SERVICE QUALITY, FOR EXAMPLE, AND INCREASING OUTLAYS FOR SHRUBBERY IS UNACCEPTABLE.
- RESPECT FOR TENANT PRIVACY; 2 FULL BUSINESS DAY NOTICE FOR NON EMERGENCY ENTRIES
- STAFF PRODUCTIVITY — NON ESSENTIAL TASKS MUST BE ELIMINATED, OR SUBSTANTIALLY CUT.
- PROPERTY MANAGER MUST PERFORM ANNUAL INSPECTIONS AND RESPOND ON SITE TO EMERGENCIES.
- PM MUST CARRY OUT ROUTINE BUILDING INSPECTIONS.
- PM MUST SUPERVISE, MONITOR, AND DISCIPLINE SECURITY SERVICE — [illegible]
- COMPUTER SERVICE SHOULD BE RETAINED TO "CLEAN" COMPUTER SYSTEM, AND CHECK FUNCTIONING
- TIMELINESS — PROCRASTINATION, DELAY, FORGETFULNESS ARE UNACCEPTABLE. TIME-TASK RESPONSIVENESS THAT IS RELIABLE IS A TENANT RIGHT
- VERACITY IN DEALING WITH TENANTS
- ROUTINE INVOLVEMENT WITH COMMUNITY POLICE