



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

Charles D. Baker, Governor ♦ Karyn E. Polito, Lieutenant Governor ♦ Janelle L. Chan, Undersecretary

June 19, 2019

Public Housing Notice # 2019-17

Subject: DHCD 2019 Facility Condition, Accessibility and Sustainability Assessment of State-Aided Public Housing

To: All Executive Directors of all Local Housing Authorities

Dear Executive Director,

The purpose of this letter is to inform you of the upcoming Facility Condition, Accessibility and Sustainability Assessment project that will begin soon.

Background

From 2006 through 2015, DHCD conducted three procurements for consultants to conduct Facility Condition Assessments (FCA) on all state-aided public housing properties. The result of each of these assessments was a uniform, consistent inventory of building and site components, including lifecycle information for all facilities, at each developments, at all LHAs entered into the Capital Planning System (CPS). In addition, during the 2008 FCA, proposed projects were created and entered into CPS based on the lifecycle information collected. This established the basis for and starting point of the Formula Funding program. DHCD used the information obtained from the FCAs to equitably allocate annual Formula Funding awards and to plan capital initiatives and programs.

DHCD 2019 Facility Condition and Accessibility Assessment Project

In order for DHCD to continue its successful Formula Funding program plan for the long-term maintenance of the state-funded public housing portfolio, and request and allocate bond authorizations, we must continue to obtain updated and accurate data on facility condition. DHCD has recently engaged **EBI Consulting**, <https://www.ebiconsulting.com>, to conduct a Facility Condition Assessment on the state-aided public housing portfolio. EBI has a wealth of experience in all types of real estate assessment projects including facility condition, accessibility, and energy to mention a few.

This assessment project, will allow DHCD to once again ensure that all LHAs are assessed uniformly and consistently, and that we have obtained the necessary data to be able to calculate future LHA Formula Funding awards based on the lifecycle of the inventory components in CPS. This time around, in addition to assessing the lifecycle of the building and site inventory components, EBI will also 1.) Conduct an assessment of units that are not marked as "Accessible" or "Adaptable" in the 2015 FCA but which the LHA characterizes as accessible (based on recent survey results), and 2.) Conducting a sustainability assessment to identify and quantify information related to the energy efficiency of building systems, building envelopes and building operations. The accessibility assessment is not a comprehensive accessibility assessment, but rather a limited, broad-brush assessment designed to identify, locate and quantify the order of magnitude needed for accessibility

improvements and modernization. The data collected and updated during these two assessments will be used by DHCD as the basis for future program awards and initiatives.

If you would like to know more about the procurement, please take a look at the COMMBUYS posting by clicking on the link below:

<https://www.commbuys.com/bso/external/bidDetail.sdo?docId=BD-19-1076-OCDDE-OCD01-36981&external=true&parentUrl=bid>

Look for and click on the document titled: **"DHCD 2019-26 Facility Condition Assessment RFR.pdf"**. This is the main Request for Responses document that will explain what the project scope is on pages 5-10. The other sample attachments shown in COMMBUYS are referenced in the main RFR document.

If you have any questions regarding the procurement, please contact Rick Brouillard at Richard.brouillard@mass.gov or David McClave at David.McClave@mass.gov.

Key Facts

1. This is a Facility Condition Assessment on the state-aided public housing portfolio only for purposes of DHCDs Formula Funding program, accessibility data collection, and sustainability component assessment. It does not include Federal Developments, but it does include Section 8 New Construction/Substantial Rehab developments.
2. At least one week's notice will be provided to all LHAs prior to any onsite assessment.
3. The project will start mid-June 2019 and continue until completion (approximately 1 year).
4. Minimum access will be required at 10% of all dwelling units, all common areas and all site areas. More access may be required based on the accessibility or sustainability assessments. Developments with greater than 100 units will only require inspections of 5% of units or 10 units, whichever is greater.

DHCD Contacts are:

1. Project Manager, Rick Brouillard, at Richard.brouillard@mass.gov

EBI contacts are:

1. Project Manager, Peter Pratt, ppratt@ebiconsulting.com for questions concerning project information.
2. Project Scheduling Coordinators/Deputy Project Managers:
 - a. Keith Spolan, kspolan@ebiconsulting.com
 - b. Susan Phillips, sphillips@ebiconsulting.com

Questions the LHA may have

1. **What will the assessment consist of?**
 - a. A Facility Condition Assessment of 10% of the dwelling units and all common areas at each LHA development to identify proper installation year and expiration year for all CPS inventory components.
 - b. A general accessibility assessment of 100% of the identified "Accessible Units" of each LHA development to classify the units as "Accessible, Adaptable or Modified" and to identify ease of conversion to fully accessible.
 - c. A sustainability assessment to collect and quantify information and components to help identify the energy efficiency of public housing developments and opportunities for improvement.

2. What will be the process?

- a. EBI will make initial contact with LHA to schedule a visit. EBI will also contact Regional Capital Assistance Team (RCAT) PM if LHA is in an RCAT. RCAT will attend kickoff meeting or site visit if able and at LHA discretion.
- b. EBI & LHA schedule LHA Kickoff meeting and site visits
- c. LHA to identify unit sampling and notify tenants as necessary
- d. LHA to determine who will escort EBI staff as necessary
- e. EBI emails the following to LHA prior to Kickoff meeting for initial review:
 - i. LHA Kickoff meeting agenda
 - ii. LHA specific CPS existing data attachments
 - iii. Pre-assessment questionnaire
- f. LHA reviews attachments (generally) and completes as necessary.
- g. EBI & LHA conduct LHA Kickoff meeting
- h. EBI conducts assessment work in the field (w/escort as necessary)
- i. EBI sends LHA revised data attachments for review, approval and signature. (DHCD requires LHA approval of work product).
- j. LHA reviews and approves attachments.
- k. EBI transmits final approved work product to DHCD.

3. When will my LHA be contacted?

- a. An exact schedule of when each LHA will be contacted and assessed is not yet developed.
- b. By August of 2019, EBI should have assessment teams deployed in all regions of the state. EBI's schedulers for this project are referenced above and they will coordinate with you mainly based on the efficiency of each assessment teams' geographical location and movement.
- c. If you have questions or concerns or black-out dates during which your LHA cannot engage, please contact one of EBI's project scheduling coordinators via email and copy Rick Brouillard at Richard.brouillard@mass.gov. Please reference the **"DHCD Facility Condition Assessment Project"** so that they can effectively respond.

4. How long will the process take for my LHA?

- a. From Kickoff meeting through approval of the work product, this process is estimated to take 1-2 weeks for small LHAs and up to 4 weeks for large LHAs. These time frames are contingent upon the LHA's diligence in reviewing and approving the work product.
- b. The entire project has an initial project duration of 12 months to complete. The project will start in June, 2019. If additional time is necessary, DHCD and EBI will negotiate this as necessary.

5. How should the LHA prepare for the assessment?

- a. **Read the RFR document that was posted on COMMBUYS**
<https://www.commbuys.com/bso/external/bidDetail.sdo?docId=BD-19-1076-OCDD-OCDD01-36981&external=true&parentUrl=bid>
- b. The LHA should take the time to fill out the pre-assessment questionnaire once they receive it.
- c. Review the Kickoff meeting agenda and existing CPS data attachments when they are sent to you by EBI to generally familiarize yourself with the data.
- d. Compile inspections summaries and maintenance summaries for your developments. (DHCD has already provided EBI with a summary of capital improvements)
- e. Prepare a list of any/all current capital and/or maintenance problems/issues. Assemble any photographs you may have to help communicate the respective problems/issues.
- f. Organize any blueprints you may have in case EBI may need to look at them while on site.
- g. Identify 10% of the dwelling units (plus a couple more for contingency) at each development that are generally most representative of the condition of the units as a whole for each development.
- h. Ensure that unit inspections are possible for all units included in the accessibility assessment.
- i. Notify the affected tenants at least 48 hours before unit access.
- j. Arrange for an LHA escort for EBI as necessary.

6. What will be expected of the LHA?

- a. The LHA will be expected to prepare as outlined above to the best of their ability.
- b. The LHA will be expected to respond to and coordinate with EBI in a timely manner when contacted.
- c. The LHA will be expected to review and approve/sign off on all work product. If there are expected delays then these should be communicated and coordinated with EBI.

7. Who do I call if I have questions or concerns?

- a. For general questions or concerns about the background and scope of the project contact Rick Brouillard at DHCD at Richard.brouillard@mass.gov
- b. For questions or concerns regarding project specific information, contact the EBI Project Manager.
- c. For scheduling questions or concerns, contact one of EBI's Project Scheduling Coordinators via email as provided above.
- d. If there are any other questions or concerns please contact Rick Brouillard at DHCD at Richard.brouillard@mass.gov

8. What happens after EBI is done with my assessment?

- a. When EBI has concluded their assessments of your developments the following will occur:
 - i. EBI will send the LHA the same attachments with revised data for the LHA to review and approve/sign off on.
 - ii. Once the LHA approves the work product, EBI will send this information to DHCD.
 - iii. DHCD will then have the CPS developer load it into the CPS database. (The LHA will not have to do any data entry.) DHCD will inform each LHA when this has happened.
 - iv. Once all assessments are complete and the last LHA has approved its data and DHCD has entered it into the CPS, DHCD will analyze the data for future funding awards for the Formula Funding program and other set-aside programs such as Accessibility and Sustainability.

Pilot Assessments

DHCD and EBI intend to conduct a pilot of the process at three LHAs in June/July of 2019, then deploy the balance of the assessment teams (10 to 12) starting in July, and then fully ramp up, as necessary, from August 2019 until completion. This implementation strategy will allow us to find efficiencies and retool the process. We are excited about this project which will help us continue our successful Formula Funding program, as well as other programs, and look forward to working collaboratively with each of you.

Remember, this project is your opportunity to ensure that the data that goes into the Capital Planning System (CPS) is an appropriate representation with regard to the lifecycle of the building and site inventory components.

Once all of the data is updated in CPS and DHCD runs the Formula Funding calculations for all LHAs based on this lifecycle data, each LHA's calculation result will be final. Your participation in this project is fundamental to ensuring that your LHA receives its proper proportion of future bond funding.

Sincerely,



Ben Stone

Director, Bureau of Housing Development & Construction



Rick Brouillard

Project Manager and Primary Project contact

CC: All DHCD public housing staff,
Peter Pratt, PE, LEED AP, Project Manager, EBI