



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

Charles D. Baker, Governor ♦ Karyn E. Polito, Lieutenant Governor ♦ Jennifer D. Maddox, Undersecretary

To: Local Housing Authority (LHA) Executive Directors
From: Ben Stone, Director, Division of Public Housing
Date: June 30, 2021
Re: Updates to Performance Management Review (PMR)

Need to Know

COVID PMRs

1. There will be ratings and site visits for PMRs starting with FYE 6/30/2021.
2. Due to the impact of COVID-19, several metrics will be “paused” for four quarters starting with FYE 6/30/2021.

Biennial PMRs

3. DHCD will begin conducting PMRs biennially (every other year) for most LHAs, starting with the FYE 6/30/2021 LHAs.
4. During the first two years of Biennial PMRs, all LHAs will be “Biennial PMR LHAs.” The bottom 10% in PMR ratings will have their PMR again the following year.
5. See Appendix A for the list of LHAs that will have their PMR conducted in Biennial Year 1 and in Biennial Year 2.

New Certifications and Trainings Criteria

6. Each LHA must have at least one staff member complete a relevant certification or training; the number of required trainings will vary by LHA size. This will be introduced as a planning year starting with FYE 6/30/21 – FYE 3/31/22 LHAs.

Adjusted Maintenance Metrics

7. DHCD is introducing new and consolidated maintenance metrics, emphasizing physical condition, which will be piloted during FYE 6/30/21 – FYE 3/31/22 PMRs.
8. Ratings will be published for the new maintenance metrics starting with the FYE 06/30/2022 PMRs.

Chief Administrative and Financial Officer (CAFO) Program

9. DHCD establishing framework for designating an LHA as “chronically poor performing” based on public PMR and Agreed Upon Procedures (AUP) findings.
10. “Three Strike”/Three Year process could result in appointment of CAFO pursuant to [c.235 of the Acts of 2014](#).

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Introduction

In the four and a half years since [its introduction with the FYE 12/31/16 planning year](#), the Performance Management Review (PMR) has provided LHA leaderships, Boards, DHCD, community members, and public housing residents with standardized, transparent metrics of LHA performance. PMR has helped boards and residents hold LHA management accountable, given DHCD data to provide technical assistance, and has highlighted areas for improvement in LHA operations. The pause in ratings to account for COVID gave DHCD the opportunity to take stock of how PMR has worked in its first years and to develop a framework to make it more effective at improving LHA performance while reducing frequency of site visits for most LHAs.

Over the past several months DHCD has worked on a comprehensive update of PMR and our oversight of housing authorities as authorized by the [Public Housing Reform legislation of 2014](#). We have incorporated feedback from a Working Group consisting of several LHA Executive Directors, Board members, and tenant representatives. This updated framework, for the first time, implements the *Chief Administrative and Financial Officer (CAFO)* appointment authority in that legislation, which provides for DHCD to issue guidelines for identifying a Housing Authority as “chronically poor-performing” and to appoint a CAFO to manage the affairs of the Housing Authority for a set time until issues are addressed. Additionally, DHCD will update PMR by consolidating maintenance metrics from 14 to 8 criteria while bringing new focus to physical condition, rather than administrative procedures. Finally, PMR will change from an annual to biennial review for most LHAs; rather than DHCD staff visiting every LHA and issuing published ratings each year, DHCD will now issue PMR ratings and visit LHAs on a biennial basis except in the case of poor results on the previous year’s PMR that would lead to a site visit and ratings in the subsequent year.

These changes will begin with the FYE 6/30/21 LHAs, with site visits beginning in September 2021. In this first year of the resumption of the PMR (FYE 6/30/21- FYE 3/31/22), DHCD will pause issuing ratings on several metrics where COVID-19 significantly affected LHA operations.

Table 1. Schedule Overview

FYE	6/30/21	9/30/21	12/31/21	3/31/22	6/30/22	9/30/22	12/31/22	3/31/23
COVID PMRs	X	X	X	X				
Maintenance Metrics Updates	Pilot	Pilot	Pilot	Pilot	X	X	X	X
Biennial Year 1	X	X	X	X				
Biennial Year 2					X	X	X	X

COVID PMRs

Per [PHN 2020-25](#), DHCD made Temporary Changes to the PMR program including no ratings for the four FYE cohorts starting with FYE 3/31/20 LHAs. This section delineates how DHCD will adjust the PMR program to reflect the impact of COVID-19 on LHA operations.

The FYE 3/31/21 LHAs will have a remote PMR/Desk Audit with no published ratings (same process as previous 4 FYE quarters). The CHAMP PMR Criteria Planning Year will start with the FYE 3/31/21 as planned ([see PHN 2020-38](#) and [PHN 2020-38 Addendum #1](#)).

For the four PMRs for FYE 6/30/2021 – 3/31/2022, LHAs will have an adjusted “COVID PMR.” This will include a site visit and unit inspection by DHCD staff, as well as published ratings. Upon receipt of the DHCD Scheduling Letter, the LHA is required to notify all LHA residents of the DHCD Site Visit and inform them of the possibility that their unit could be inspected. At least 72 hours before the Site Visit, LHAs will receive notification from DHCD listing units that could be selected for possible inspection. Note that while DHCD will conduct unit inspections on a sample of units, DHCD will not publish ratings relative to inspections for the COVID PMRs.

Table 2. COVID PMR Criteria FYE 6/30/2021 – 3/31/2022. DHCD will only publish ratings for metrics marked “Keep” or “Adjust”.

	Criteria	COVID PMR Status	Details
Desk Review	Occupancy Rate	Keep	
	Board Member Training	Keep	
	Certifications and Reporting Submissions	Keep	
	Operating Reserves	Keep	
	TAR	Pause	
	Adjusted Net Income	Pause	
Capital	CIP Submitted on Time	Adjust	Change to Annual Plan submitted on time*
	Capital Spending	Pause	
Maintenance	Emergency WOs Properly Defined	Keep	
	Emergency WOs Initiated	Keep	
	Vacancy WOs	Keep	
	Vacancy WOs Completed	Keep	
	Preventative Maintenance Program	Keep	
	Emergency Response System	Keep	
	Routine WOs	Adjust	Check WOs tracked, not completed
	Requested WOs	Adjust	Check WOs tracked, not completed
	100% Unit Inspections	Pause	
	Inspection reports noted 100% of the necessary repairs in each unit	Pause	This will not be rated, but DHCD will still conduct unit inspections
	Inspection WOs generated	Pause	
	WO system identifies, tracks, and produces inspection WO	Pause	
	Inspection-generated WOs completed in 30 days or added to DM/CIP	Pause	
	Requested WOs Completed	Pause	
CHAMP	CHAMP Criteria 1 (Planning)	Keep	
	CHAMP Criteria 2 (Planning)	Keep	

*Permanent change.

Changes to CIP Criteria

The Capital Improvement Plan (CIP) submission criteria will change to Annual Plan Submission. See details below.

Table 3. Annual Plan Submission PMR Criteria

Performance Area	No Findings	Operational Guidance	Corrective Action
Annual Plan Submission	Annual Plan submitted on time	Annual Plan submitted up to 45 days late	Annual Plan not submitted/submitted more than 45 days late

New Certifications and Trainings Criteria

[Chapter 235 of the Acts of 2014](#) required the monitoring program to include assessment of executive director and senior staff training. Under this new metric, which will be rolled out as a *planning year* for the 6/30/21-3/31/22 LHA cohorts, each LHA must have at least one staff member complete professionally related training and certifications within the year. The total number of required trainings varies according to the size of an LHA. Small LHAs must complete at least one training, medium LHAs must complete at least two trainings, and large/very large LHAs must complete at least three trainings (across any number of staff members) as part of their PMR assessment.¹ See Appendix C for a non-exhaustive list of certification and training suggestions.

Verification

In order to receive credit for the training classes, the LHA must provide copies of certifications (if available), date(s) of class(es), the name of trainer and/or agency providing training, and the title of the class.

PMR Assessment

- LHAs that have completed the number of trainings as required above will receive no findings.
- LHAs that have partially completed the number of trainings as required above will receive operational guidance.
- LHAs that have not completed any trainings will receive corrective action.

Biennial PMRs

DHCD is introducing Biennial PMRs. Under the Biennial PMR process, most LHAs will have PMRs every other year.

Biennial PMRs

LHAs that are assigned to have Biennial PMRs will have a PMR every other year. During the off year, when an LHA is not having a Biennial PMR, DHCD will only run the PMR Desk Audit and share the data with the ED and LHA Board. If there are significant issues that come to light in the Desk Audit, an LHA's HMS will reach out to schedule a conversation. Every other year, LHAs assigned to have Biennial PMRs

¹ Small 1 – 199 units; Medium 200 – 499 units; Large 500 to 999 units; Very Large 1,000 or more units.

will have a full PMR with the Desk Audit, Site Visit, and ratings officially published to the LHA's Annual Plan. These ratings will not be published in the off year.

Annual PMRs

LHAs that are assigned to have Annual PMRs will have a full PMR each year, including the Desk Audit, Site Visit, and ratings published to the LHA's Annual Plan.

Table 4. Biennial PMR Schedule

	FYEs	How Biennial Status Determined	Year 1 LHA Group	Year 2 LHA Group
Biennial Year 1	6/30/2021 – 3/31/2022	DHCD assigns to Year 1 or Year 2 Group	Have PMR	Off year
Biennial Year 2	6/30/2022 – 3/31/2023	Biennial Year 1 Score Model (based on previous year data)	Depending on Biennial Year 1 Score Model: off year or have PMR	Have PMR
Biennial Year 3	6/30/2023 – 3/31/2024	Biennial Year 2 Score Model (based on previous year data)	Have PMR*	Depending on Biennial Year 2 Score Model: off year or have PMR

*Unless had a repeat PMR in Biennial Year 2 and scored above threshold.

Determining Biennial v. Annual PMR for Biennial Year 1 (6/30/21-3/31/22)

For Biennial Year 1, all LHAs will be assigned as to have Biennial PMRs. Half of LHAs will have their PMR in Biennial Year 1 and half will have their PMR in Biennial Year 2 (see Appendix B for Biennial assignments). Based on performance during these two years, LHAs will either be assigned to have Biennial PMRs or Annual PMRs for the next year. LHAs will stay on a biennial schedule until they score in the bottom 10% in the PMR scoring model, and will return to a biennial schedule after surpassing that threshold in a subsequent PMR.

Determining Biennial v. Annual PMR for Biennial Year 2 (6/30/22-3/31/23)

Year 1 LHA Group (see Table 4): Whether the Year 1 Group has a PMR in Biennial Year 2 will depend on performance in Biennial Year 1. LHAs in the bottom 10% of scores on the Biennial Scoring Model will have a PMR in Biennial Year 2. LHAs not in the bottom 10% of scores on the Biennial Scoring Model will have an off year in Biennial Year 2.

Year 2 LHA Group (see Table 4): Because these LHAs did not have a PMR in Biennial Year 1, all LHAs in the Year 2 Group will have a PMR in Biennial Year 2.

Biennial Year 1 Scoring

This model will be applied to LHAs that have a PMR in Biennial Year 1 (due to DHCD assignment; see Appendix B). To determine whether these LHAs will be skipped during Biennial Year 2 the following model will be applied:

- LHAs that score on Biennial Year 1 Score Model in lowest 10% of LHAs in their cohort will become “Annual LHAs” and will have PMR in Biennial Year 2
 - o See Table 5 for details on Biennial Score Model
- New ED or Management Agent (who started employment after the previous year's PMR Site Visit) will have PMR in Biennial Year 2

Table 5: Year 1 Scoring Model (COVID PMR)

	Criteria	Total Points	Point Breakdown
Desk Review	Occupancy Rate	15	No Findings - 15 Operational Guidance - 7.5 Corrective Action - 0
	Board Member Training	5	No Findings - 5 Operational Guidance - 2.5 Corrective Action - 0
	Certifications and Reporting Submissions	5	No Findings - 5 Operational Guidance - 2.5 Corrective Action - 0
	Operating Reserves	12	No Findings - 12 Operational Guidance - 6 Corrective Action - 0
	Annual Plan Submitted on Time	15	No Findings - 15 Operational Guidance - 7.5 Corrective Action - 0
Physical Condition	Emergency WOs Properly Defined	6	For each of the 8 included Physical Condition Criteria: No findings - 6 points Operational Guidance - 3 points Corrective Action - 0 points
	Emergency WOs Initiated	6	
	Vacancy WOs	6	
	Vacancy WOs Completed	6	
	Preventative Maintenance Program	6	
	Emergency Response System	6	
	Routine WOs	6	
	Requested WOs	6	
Total		100	

The next year, for PMRs conducted in Biennial Year 2, DHCD will use an updated scoring model based on all metrics, including the adjusted maintenance metrics and metrics paused for the COVID PMR quarters. After the 1st two years, DHCD will reassess whether “bottom 10%” is the appropriate cutoff or if an absolute scoring threshold better represents the need for an annual PMR.

Adjusted Maintenance Metrics

Key Highlights

- PMR Maintenance Metrics are changing. These changes will be piloted for FYE 6/30/2021 – FYE 3/31/2022 and have ratings published starting in FYE 6/30/2022. DHCD may make further adjustments based on the pilot; these criteria are not yet final.
- Maintenance Metric criteria will be reduced from 14 to 8.
- Focus will shift from the administrative aspects of LHA maintenance operations to inspection based, physical condition criteria.

Why?

- Enhancing DHCD review of physical inspection components will help further verify LHA residents live in safe and sanitary housing.
- LHAs have been largely successful establishing and implementing current administrative DHCD PMR criteria for Facilities Management (work order software, types, timeliness, tracking).
- LHA success allows DHCD to broaden overall view and adopt a multi-dimensional physical assessment of LHA maintenance operations.
- LHA capacity - Reduce required paperwork that LHA must produce for PMR.

- Reduced frequency of PMRs (from every year to every other year in most cases) allows DHCD staff time on site for expanded physical condition review and enhanced technical assistance.

What will change?

- A significant decrease and consolidation of DHCD administrative work order review.
- Increased scope of DHCD FMS physical inspections.
- Certain scores now based on actual condition through number of health and safety deficiencies found. See Appendix A for detailed scoring of findings.
- Greater emphasis and further evaluation of LHA maintenance operations through physical inspection components, with focus on:
 - LHA Inspection Program
 - LHA Vacancy Turnover standards
 - LHA Preventive Maintenance Program
 - Common Areas
 - Mechanical Rooms
 - Building Exterior and Grounds

Table 6: Adjusted Maintenance Metric Criteria Overview (see Appendix A for detailed scoring model)

Criteria	General Summary
1. 100% Unit Inspections	All units inspected at LHA during FYE under review.
2. LHA Inspection Reports/Work Orders	Any Deficiencies/Lease Violations associated with sample Inspection Reports have generated work orders/correspondence and work is completed within established timeframe or moved to DM.
3. Vacancy Turnover Work Orders	All Vacant Units have work orders that itemize performed work. Work is completed within established timeframe or unit has an approved waiver.
4. Emergency Work Orders	Emergency work orders are created, tracked, reportable and completed within forty-eight (48) hours.
5. Requested Work Orders	Requested work orders are created, tracked, reportable and completed within fourteen (14) days or moved to DM/CIP.
6. Accuracy of LHA Inspections	FMS Physical Inspection of unit based on review of sample inspection reports.
7. Accuracy and Standard of Vacancy Turnovers	FMS Physical Inspection of maintenance ready unoccupied unit or unit occupied within FYE under review. Inspection of unit based on review of sampled vacancy work orders.
8. LHA Preventive Schedule Accuracy and Implementation of Preventive Schedule	FMS Physical Inspection of LHA exteriors, common areas, mechanical rooms, equipment based on review of LHA preventive maintenance schedule. DHCD will conduct these inspections at each building where it conducts a unit inspection.

DHCD will adjust the number of inspection and vacancy work order reports pulled, as well as physical inspections conducted, based on LHA size. See table below reflecting current practices and upcoming PMR changes.

Table 7: Required Reporting for Adjusted Maintenance Metrics

LHA Size	Current	New
Small	7 inspection reports 3 unit inspections	<ul style="list-style-type: none"> • 5 inspection reports + • 2 vacancy work orders • 3 unit + building inspections
Medium	10 inspection reports 4 unit inspections	<ul style="list-style-type: none"> • 7 inspection reports + • 3 vacancy work orders • 4 unit + building inspections
Large/ Very Large	15 inspection reports 6 unit inspections	<ul style="list-style-type: none"> • 10 inspection reports + • 5 vacancy work orders • 6 unit + building inspections

DHCD is reducing the number of months and types of work orders an LHA must provide, based on LHA size. Please see table below reflecting current practice and upcoming changes.

Table 8: Number of Required Work Order Submissions

Work Order Type	LHA Size	Current	New
Emergency Work Orders	Small	12 months	9 months
	Medium		6 months
	Large/Very Large		3 months, non-consecutive
Requested Work Orders	Small	12 months	9 months
	Medium		6 months
	Large/Very Large		3 months, non-consecutive
Inspection and Vacancy Work Orders		12 months	Pre-selected as part of inspection criteria (see previous slide)
Routine Work Orders		12 months	DHCD <u>ceases</u> review
Preventative Work Orders		12 months	LHA provides 12 month-preventative schedule of work

What to expect?

To prepare for the adjusted PMR (starting with the FYE 6/30/2022 PMRs), LHAs should notify all residents of Site Visit and provide DHCD:

- Inspection reports and corresponding inspection workorders/lease enforcement for all units listed in 72-hour notice (determined by LHA size)
- Vacancy work orders for all units listed in 72-hour notice (determined by LHA size)
- Emergency work order reports (determined by LHA size)
- Requested work order reports (determined by LHA size)
- Preventative maintenance schedule of work

- Deferred maintenance schedule of work

Please note: DHCD FMS will be inspecting many areas and components of your LHA. Access will be required.

Chief Administrative and Financial Officer (CAFO) Program

[MGL c.121B Section 26B\(d\)](#), as enacted by c.235 of the Acts of 2014, authorizes DHCD to “establish guidelines for designating a housing authority as “chronically poor performing” under the monitoring program.” DHCD has established a monitoring program through PMR and AUP. DHCD is also empowered to “appoint a chief administrative and financial officer...who is responsible for the overall administration of the housing authority.” DHCD is now establishing those guidelines.

This designation of “chronically poor performing” housing authority and appointment of a Chief Administrative and Financial Officer (CAFO) is meant to further incentivize LHA management and boards to address poor performance and non-compliance with statutes and regulation. The designation is based solely on transparent, public findings in AUP and PMR, and will be invoked only in extreme cases of *chronic poor performance*.

Chronically Poor Performing Designation

LHAs are designated as *Chronically Poor Performing* based on a “3 strike” process resulting from poor performance on AUP and/or PMR over 3 successive years.

1. Strike 1/Year 1: Fall below Annual PMR Threshold (bottom 10% of scores) OR fall below AUP threshold (bottom 5% in terms of number of findings).
2. Strike 2/Year 2: Again, fall below Annual PMR Threshold (bottom 10% of scores) OR fall below AUP threshold (bottom 5% of scores).
 - a. Board notified that LHA is in final stage before being named *Chronically Poor Performing*. Board is required to file Corrective Action Plan to address findings with DHCD within 2 months of notification by DHCD. DHCD will provide in-depth technical assistance as needed based on findings.
 - b. Failure to file board-approved Corrective Action Plan will result in immediate designation as *Chronically Poor Performing* and appointment of a CAFO.
3. Strike 3/Year 3: For third consecutive year, fall below Annual PMR threshold OR fall below AUP threshold.
 - a. Designated as *Chronically Poor Performing* and appointment of a CAFO.

Scoring above both the AUP/PMR thresholds in any year or appointing a new Executive Director or Management Agent resets the count of “strikes” to zero.

After the first two years of this Biennial PMR and CAFO process (starting with FYE 6/30/2023 LHAs) DHCD may announce new, absolute scoring thresholds for PMR and AUP rather than the poorest performing 10% (on PMR) or 5% (on AUP) of LHAs receiving a CAFO strike.

Chief Administrative and Financial Officer (CAFO) Role

The CAFO will have overall responsibility for the work of the Housing Authority. This includes HUD-funded units, state-aided units, and vouchers. The CAFO legislation puts emphasis on fiscal management

of the Housing Authority, but does not limit the scope of work to specific job functions. The CAFO will act in a role similar to an Executive Director or Receiver.

The CAFO is appointed for a maximum three year duration, but the LHA can achieve an early end to the CAFO tenure and return to management by a board-appointed Executive Director through:

- Hiring New ED or management agent (this would trigger review that *MAY* lead to DHCD approval of early end to CAFO tenure).
- Surpassing the PMR/AUP thresholds noted above.
 - Note that, if AUP/PMR in year following end of CAFO tenure is below acceptable thresholds, DHCD may immediately designate as chronically poor performing and reappoint a CAFO.

The CAFO is also required to submit, annually, a 4-year financial plan and 5-year capital plan to DHCD.

The CAFO will be a consultant hired by the Housing Authority, but selected and appointed in consultation with DHCD. This cost will be funded by the LHA, with DHCD providing a budget exemption for some or all of the pro rata state-share of cost if LHA reserves are below 35% of operating budget.

The legislation enabling CAFO only gives DHCD the authority to remove the Executive Director "If the department finds clear and convincing evidence of a demonstrable threat to tenant safety attributable to the conduct of the executive director or financial misconduct or criminal activity by the executive director." DHCD, however, will not approve salary increases for an Executive Director while an appointed CAFO is in place.

DHCD will release more detailed guidance on selection, appointment, and oversight of CAFO in the future, before a CAFO may be appointed through the 3-year process above.

Please contact your Housing Management Specialist with any questions.

Appendices

Appendix A: Adjusted Maintenance Metrics Criteria Detail

Appendix B: Biennial PMR Assignments

Appendix C: Certifications and Trainings Options

Appendix A. Adjusted Maintenance Metrics Criteria Detail

CRITERIA	NO FINDINGS	OPERATIONAL GUIDANCE	CORRECTIVE ACTION
<p>1. 100% of units inspected during FYE under review*</p> <p>*Substitution of certain units allowed at discretion of FMS.</p>	All Units Inspected	No Operational Guidance for this criteria.	Fewer than 100% of sample unit inspections were conducted once during the FYE under review.
<p>2. Unit inspection reports create, track, and report work orders for inspection repairs, and complete WOs within 30 days or add to DM/CIP</p> <p>Note – Health and Safety work orders cannot be deferred to DM/CIP.</p>	<p>All inspection work orders/lease violations are created, tracked, and reported.</p> <p>AND</p> <p>Work orders for inspection repairs are completed within 30 days or added to DM/CIP.</p> <p>AND</p> <p>Lease violations are addressed within 30 days.</p>	<p>All health and safety inspection work orders/lease violations are created, tracked and reported.</p> <p>AND</p> <p>LHA missed no more than 1 or 2 (Based on LHA size) Non-EHS deficiencies.</p> <p>OR</p> <p>All Non-EHS work orders/lease violations for inspection repairs are not completed/addressed within 30 days or added to DM/CIP.</p>	<p>Any EHS work orders/lease violations not created, tracked, reported, completed.</p> <p>OR</p> <p>1 of the following:</p> <ul style="list-style-type: none"> LHA missed more than 1 Non-EHS deficiency (Small) LHA missed more than 2 Non-EHS deficiency (Medium/Large)
<p>3. Unit inspection reports accurately reflect necessary repairs.</p> <p>Findings if that number of Exigent Health Safety (EHS) Deficiencies at ANY unit inspected at site visit.</p>	LHA inspection report and work orders align with FMS physical Inspection of unit.	<p>667- 2 EHS Deficiencies</p> <p>705/200- 3 EHS Deficiencies</p>	<p>667- Equal to or greater than 3 EHS Deficiencies</p> <p>705/200- Equal to or Greater than 4 EHS Deficiencies</p>
<p>4. Vacancy Turnover Work Orders: Work orders created for every vacancy and completed within 30 days (or waiver requested).</p>	<p>Vacancy Work Orders are created, tracked and reported for every unit</p> <p>AND</p> <p>Vacancy Work Orders are “Maintenance Ready” <30 days for 667 or <45 days for 200/705 or have approved waiver</p>	<p>Vacancy Work Orders are created, tracked and reported for every unit</p> <p>AND</p> <p>Work Orders do not reflect all work completed in unit. (E.g., Work order says “turned over unit” but lacks further detail.)</p> <p>OR</p> <p>Vacancy Work Orders are not Maintenance Ready in 30-45 days for 667 and 45-60 days for 200/705 and no approved waiver.</p>	<p>Vacancy Work Orders are not created, tracked and reported for every unit.</p> <p>OR</p> <p>Vacancy Work Orders are not Maintenance Ready and exceed 45 days for 667 or 60 days for 200/705 and have no approved waiver.</p>

5. Vacancy turnover work orders accurately reflect necessary repairs. Findings if that number of EHS at ANY unit inspected at site visit. If not tenant occupied, threshold is one fewer EHS per unit.	667-Less than 2 EHS Deficiencies 705/200- Less than 3 EHS Deficiencies	667- 2 EHS Deficiencies 705/200- 3 EHS Deficiencies	667- Equal to or greater than 3 EHS Deficiencies 705/200- Equal to or Greater than 4 EHS Deficiencies
6. LHA Preventive Schedule Accuracy and Implementation of Preventive Schedule: LHA Preventive Maintenance schedule accurately reflects all necessary work to maximize life of LHA components. Findings if that number of EHS at ANY building inspected at site visit.	667-Less than 2 EHS Deficiencies 705/200- Less than 3 EHS Deficiencies	667- 2 EHS Deficiencies 705/200- 3 EHS Deficiencies	667- Equal to or greater than 3 EHS Deficiencies 705/200- Equal to or Greater than 4 EHS Deficiencies
7. Emergency work orders created, track, and report in accordance with PMG and necessary repairs are completed within 48 hours	All emergency work orders under review are created, tracked, reported and completed within 48 hours.	All Emergency Work Orders completed within 48 hours. AND Fewer than 100% of Work Orders under review are correctly tracked and reported administratively.	Emergency Work Orders are not completed within 48 hours. OR Fewer than 80% of Work Orders under review are correctly tracked and reported administratively.
8. Requested Work Orders are created, tracked and reported. All work orders are completed within 14 days or added to DM/CIP.	All requested work orders under review are created, tracked, reported. All work is complete within 14 days or added to DM/CIP.	All Requested Work Orders completed within 14 days or added to DM/CIP. AND Fewer than 100% of Work Orders under review are correctly tracked and reported administratively.	Requested work orders are not completed within 14 days or added to DM/CIP. AND Fewer than 80% of work orders under review are correctly tracked and reported administratively.

Appendix B. Biennial PMR Assignments

<u>BIENNIAL YEAR 1</u> LHAs that will have full PMR published in FYE 6/30/2021 – FYE 3/31/2022	<u>BIENNIAL YEAR 2</u> LHAs that will have full PMR published in FYE 6/30/2022 – 3/31/2023
Abington Housing Authority Amesbury Housing Authority Amherst Housing Authority Ashland Housing Authority Athol Housing Authority	Acton Housing Authority Acushnet Housing Authority Adams Housing Authority Agawam Housing Authority Andover Housing Authority

Attleboro Housing Authority	Arlington Housing Authority
Ayer Housing Authority	Auburn Housing Authority
Barnstable Housing Authority	Avon Housing Authority
Barre Housing Authority	Bedford Housing Authority
Belchertown Housing Authority	Bellingham Housing Authority
Belmont Housing Authority	Braintree Housing Authority
Beverly Housing Authority	Bridgewater Housing Authority
Billerica Housing Authority	Burlington Housing Authority
Blackstone Housing Authority	Canton Housing Authority
Boston Housing Authority	Carver Housing Authority
Bourne Housing Authority	Chatham Housing Authority
Brewster Housing Authority	Chelmsford Housing Authority
Brimfield Housing Authority	Clinton Housing Authority
Brockton Housing Authority	Concord Housing Authority
Brookline Housing Authority	Danvers Housing Authority
Cambridge Housing Authority	Dartmouth Housing Authority
Charlton Housing Authority	Dedham Housing Authority
Chelsea Housing Authority	Dennis Housing Authority
Chicopee Housing Authority	Dighton Housing Authority
Cohasset Housing Authority	Dracut Housing Authority
Dalton Housing Authority	East Bridgewater Housing Authority
Dudley Housing Authority	Easthampton Housing Authority
Duxbury Housing Authority	Essex Housing Authority
East Longmeadow Housing Authority	Fairhaven Housing Authority
Easton Housing Authority	Fitchburg Housing Authority
Everett Housing Authority	Foxborough Housing Authority
Fall River Housing Authority	Gloucester Housing Authority
Falmouth Housing Authority	Grafton Housing Authority
Framingham Housing Authority	Greenfield Housing Authority
Franklin Housing Authority	Halifax Housing Authority
Franklin County Regional Housing Authority	Hampden Housing Authority
Gardner Housing Authority	Hatfield Housing Authority
Georgetown Housing Authority	Holliston Housing Authority
Granby Housing Authority	Holyoke Housing Authority
Great Barrington Housing Authority	Hopedale Housing Authority
Groton Housing Authority	Hopkinton Housing Authority
Groveland Housing Authority	Lawrence Housing Authority
Hadley Housing Authority	Leicester Housing Authority
Hamilton Housing Authority	Lenox Housing Authority
Hampshire County Regional Housing Authority	Leominster Housing Authority
Hanson Housing Authority	Lexington Housing Authority
Harwich Housing Authority	Lowell Housing Authority
Haverhill Housing Authority	Ludlow Housing Authority
Hingham Housing Authority	Lunenburg Housing Authority
Holbrook Housing Authority	Lynnfield Housing Authority

Holden Housing Authority	Malden Housing Authority
Hudson Housing Authority	Manchester Housing Authority
Hull Housing Authority	Marlborough Housing Authority
Ipswich Housing Authority	Mattapoisett Housing Authority
Kingston Housing Authority	Melrose Housing Authority
Lancaster Housing Authority	Merrimac Housing Authority
Lee Housing Authority	Middleborough Housing Authority
Littleton Housing Authority	Middleton Housing Authority
Lynn Housing Authority	Montague Housing Authority
Mansfield Housing Authority	Nantucket Housing Authority
Marblehead Housing Authority	Needham Housing Authority
Marshfield Housing Authority	New Bedford Housing Authority
Mashpee Housing Authority	Newton Housing Authority
Maynard Housing Authority	Norfolk Housing Authority
Medfield Housing Authority	North Attleborough Housing Authority
Medford Housing Authority	North Brookfield Housing Authority
Medway Housing Authority	North Reading Housing Authority
Mendon Housing Authority	Northampton Housing Authority
Methuen Housing Authority	Northborough Housing Authority
Milford Housing Authority	Norwood Housing Authority
Millbury Housing Authority	Oxford Housing Authority
Millis Housing Authority	Peabody Housing Authority
Milton Housing Authority	Pembroke Housing Authority
Monson Housing Authority	Plainville Housing Authority
Nahant Housing Authority	Provincetown Housing Authority
Natick Housing Authority	Quincy Housing Authority
Newburyport Housing Authority	Randolph Housing Authority
North Andover Housing Authority	Raynham Housing Authority
Northbridge Housing Authority	Reading Housing Authority
Norton Housing Authority	Rockport Housing Authority
Norwell Housing Authority	Rowley Housing Authority
Orange Housing Authority	Salisbury Housing Authority
Orleans Housing Authority	Sandwich Housing Authority
Palmer Housing Authority	Scituate Housing Authority
Pepperell Housing Authority	Seekonk Housing Authority
Pittsfield Housing Authority	Shelburne Housing Authority
Plymouth Housing Authority	Shrewsbury Housing Authority
Revere Housing Authority	Southbridge Housing Authority
Rockland Housing Authority	Southwick Housing Authority
Salem Housing Authority	Spencer Housing Authority
Saugus Housing Authority	Stockbridge Housing Authority
Sharon Housing Authority	Stoneham Housing Authority
Somerset Housing Authority	Stoughton Housing Authority
Somerville Housing Authority	Swansea Housing Authority
South Hadley Housing Authority	Taunton Housing Authority

Southborough Housing Authority	Templeton Housing Authority
Springfield Housing Authority	Tewksbury Housing Authority
Sterling Housing Authority	Wakefield Housing Authority
Sudbury Housing Authority	Walpole Housing Authority
Sutton Housing Authority	Watertown Housing Authority
Swampscott Housing Authority	Webster Housing Authority
Topsfield Housing Authority	West Bridgewater Housing Authority
Tyngsborough Housing Authority	West Brookfield Housing Authority
Upton Housing Authority	West Springfield Housing Authority
Uxbridge Housing Authority	Westborough Housing Authority
Waltham Housing Authority	Westfield Housing Authority
Ware Housing Authority	Whitman Housing Authority
Wareham Housing Authority	Wilbraham Housing Authority
Warren Housing Authority	Williamstown Housing Authority
Wellesley Housing Authority	Wilmington Housing Authority
Wenham Housing Authority	Winchendon Housing Authority
West Boylston Housing Authority	Winchester Housing Authority
West Newbury Housing Authority	Winthrop Housing Authority
Westford Housing Authority	Woburn Housing Authority
Westport Housing Authority	Worcester Housing Authority
Weymouth Housing Authority	Wrentham Housing Authority
Yarmouth Housing Authority	

Appendix C. Certifications and Trainings Options

Suggested Certifications

1. Massachusetts Public Housing Administrator (MPHA) Certification
2. Massachusetts Certified Public Purchasing Officials (MCPPO)
3. ICORI

Additional Training Options

- Conflicts of Interest/Ethics
- Open Meeting Law
- Public Records/Privacy
- CHAMP
- Sexual Harassment
- Reasonable Accommodations
- Housing/Employment Discrimination
- Diversity Awareness/Unconscious Bias
- Conflict Resolution/Mediation
- Management/Supervision of Employees
- Lease Enforcement
- Maintenance Planning/Procedures
- Rent Calculation
- Fiscal Management/Budget
- Tenant Selection Screening
- Computer Literacy/Skills