



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

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

PHN 2022-09

To: Local Housing Authority (LHA) Executive Directors
From: Ben Stone, Director, Division of Public Housing
Date: June 14, 2022
Re: Updates to Performance Management Review (PMR) for 2022 Cycle

Need to Know....

End of COVID PMRs

The following metrics will be **un-paused and published starting with FYE 6/30/2022 LHAs.**

- Tenant Accounts Receivable (TAR)
- Adjusted Net Income (ANI)
- Unit Inspections (See Section 3. New Maintenance Metrics for additional information)
- Capital Spending

New Certifications and Trainings Criteria (*Planning year concluded with the 3/31/2022 FYE LHAs*)

- This criteria will be **rated and published starting with FYE 6/30/2022 LHAs.**
- *See Appendix A for the list of certification and training options.*

CHAMP Criteria 1 & 2 (*The CHAMP PMR Criteria Planning Year will conclude with the 03/31/2022 FYE LHAs*).

- Criteria will be **rated and published starting with the FYE 06/30/2022 LHAs.**

CHAMP Criteria 3 (*Planning year 06/30/2022 through 03/31/2023*)

- **Beginning with PMRs for FYE 6/30/2022 LHAs,** DHCD will be reviewing LHA use of the Fair Housing page in CHAMP to assure that LHAs are recording information related to Fair Housing.

Biennial PMRs Year 2

- Starting with FYE 06/30/2022 through FYE 03/31/2023
- *See Appendix B for List*

Introduction:

DHCD is entering the 2nd year of the revised and biennial PMR process. This second year of biennial PMR builds on the first by resuming metrics paused for COVID, instituting new maintenance metrics focused on physical conditions, and updates to the scoring model that defines whether an LHA will receive a “strike” towards the chronically poor-performing designation. We also, for the first time, will incorporate tenant selection into PMR. These changes will help DHCD holistically assess LHA operations and use transparent, data-driven metrics to focus on LHAs that require further oversight and technical assistance.

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1. Unpausing All Metrics

Starting with FYE 6/30/2022 LHAs, DHCD will “unpause” all metrics deferred for COVID and will publish ratings for:

- Annual Net Income (ANI);
- Tenant Accounts Receivable (TAR);
- Unit Inspections; and,
- Capital Spending

DHCD will also resume full site visits, including unit inspections by a Facility Management Specialist and file review & meeting with a Housing Management Specialist.

2. Updated PMR Scoring

FYE 06/30/2022 through 03/31/2023 PMRs will continue the “biennial” model by which most LHAs undergo a PMR every other year. Only those falling below the threshold occurring to the below scoring model will receive a strike towards the “*chronically poor-performing*” designation and undergo a PMR the following year. See [PHN 2021-13 Updates to Performance Management Review](#) for more details on the biennial PMR and CAFO process.

In the 2022 cycle (6/30/22-3/31/23 PMRs), LHAs scoring **65% or below** on the scoring model will receive a “strike” and a PMR the following year.

We have updated the scoring model from PHN 2021-13 to reflect the metrics previously paused for COVID as well as the new maintenance metrics. **Please see, *Table 1 PMR Scoring Model.***

3. New Maintenance Metrics (*Published*)

As outlined previously in [Public Housing Notice \(PHN\) 2021-13](#), the Department of Housing and Community Development (DHCD) is changing Performance Management Review (PMR) criteria as it relates to Facilities Management. Beginning with the 6/30/22 FYE cohort, DHCD will be reducing certain aspects of the administrative review of work order systems and substantially increasing physical inspections at your local housing authority (LHA).

KEY CHANGE: Several PMR ratings will now be generated based on the number of health and safety findings cited during a DHCD physical inspection of LHA properties.

Please see [PHN 2022-10 Revised PMR Maintenance Metrics](#) for complete details on changes to PMR maintenance metrics.

Table 1. PMR Scoring Model

	Criteria	Total Possible Points	1Point Breakdown
Desk Review (44 points)	Occupancy Rate	6	NF = 6.0 OG = 3.0 CA = 0
	Board member Training	3	NF = 3.0 OG = 1.5 CA = 0
	Staff Certifications and Training Criteria	3	NF = 3.0 OG = 1.5 CA = 0
	Certification and Reporting Submissions	5	NF = 5.0 OG = 2.5 CA=not applicable
	Operating Reserves	7	NF = 7.0 OG = 3.5 CA = 0
	Annual Plan submitted on time	7	NF = 7.0 OG = 3.5 CA = 0
	Adjusted Net Income	7	NF = 7.0 OG = 3.5 CA = 0
	Tenant Accounts Receivable	6	NF = 6 OG = 3 CA = 0
CHAMP (8 points)	CHAMP Criteria 1	3	NF = 3.0 OG = 1.5 CA = 0
	CHAMP Criteria 2	5	NF = 5.0 OG = 2.5 CA = 0
Capital (4 points)	Capital Spending	4	NF = 4.0 OG = 2.0 CA = 0
Physical Conditions (44 points)	100% Unit Inspections	5	NF = 8.0
	LHA Inspection Reports/ Work orders	5	OG = 4.0
	Vacancy Turnover Work Orders	3	CA = 0
	Emergency work orders are created, tracked, reportable and completed	4	NF = 5.0
	Requested work orders are created, tracked, reportable and completed	3	OG = 2.5 CA = 0
	Accuracy of LHA Inspections	8	
	Accuracy and Standard of Vacancy Turnovers	8	NF = 4.0 OG = 2.0 CA = 0
	LHA Preventive Schedule Accuracy and Implementation of Preventive Schedule	8	NF = 3.0 OG = 1.5 CA = 0
Total		100%	

1 NF = No Finding; OG = Operational Guidance; CA = Corrective Action

4. Staff Certification and Training Criteria (*Published*)

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. ²See Appendix A for a non-exhaustive list of certification and training options.

Verification

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

5. CHAMP Criteria 1 & 2 (*Published*)

CHAMP PMR Criteria 1 and 2 will move on from a Planning Year to a Publishing Year beginning with FYE 06/30/2022. While these CHAMP criteria ratings will be published as part of an LHA's PMR record for the LHAs in an Official PMR biennial year, the unpublished, "off-year" LHAs will not have their ratings published.

These criteria evaluate if an LHA is providing and entering CHAMP paper applications and if an LHA is using CHAMP to fill all vacancies. A PMR rating of “No Findings” indicates that an LHA meets or exceeds expectations; “Operational Guidance” indicates that the LHA must make slight changes to improve in that performance area; “Corrective Action” indicates that an LHA must develop and implement a plan of action to correct any deficiencies noted in order to improve performance to a satisfactory level. Please see [PHN 2020-38](#) and [PHN 2020-38 Addendum #1](#) for criteria details.

DHCD can assess Criteria 1 and 2 remotely. DHCD will evaluate LHA data and let LHAs know their provisional ratings. In this publishing year, DHCD will publish ratings on DHCD's website and in the PMR section of LHA Annual Plans. See Table 2 for the timeline.

Table 2.

The first *publishing year* for CHAMP PMR Criteria 1 & 2 will be the FYE 6/30/2022 LHAs.

	Data Review Period for Publishing Year: 1st Cohort
Criteria 1: Paper applications are available, received and entered into CHAMP	07/01/2021-06/30/2022
Criteria 2: Vacancies are recorded correctly and occupied using CHAMP	07/01/2021-06/30/2022

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

6. **CHAMP Criteria 3: Fair Housing** (*Criteria 3a Publishing; Criteria 3b Planning*)

Overview

Local Housing Authorities (LHAs) have responsibilities regarding fair housing for tenant selection in state-aided public housing. These requirements are contained in Chapter 121B and DHCD regulations 760 CMR 4.02(1)(e), 760 CMR 4.07 and 760 CMR 5.00, as well as fair housing and anti-discrimination laws. DHCD is implementing this PMR criteria to reinforce and review housing authority compliance with fair housing requirements. See [PHN 2021-14](#) for more details on CHAMP Fair Housing criteria.

CHAMP PMR Criteria 3 has two components:

- (a) **Required Plans *Planning Year #1***: DHCD regulations require LHAs to have a drafted and Board Adopted Fair Housing Marketing Plan, Language Access Plan, and Reasonable Accommodation Plan uploaded in the Fair Housing Details Page in CHAMP by their next FYE on or after 6/30/22. DHCD provided template plans through [PHN 2021-17 \(Reasonable Accommodation Policy\)](#), [PHN 2021-21 \(Language Access Plan\)](#), and [PHN 2022-03 \(Fair Housing Marketing Plan\)](#). DHCD will evaluate in the 2022 cycle whether LHAs have adopted these plans by board vote and posted them to CHAMP.

- (b) **LHA Affirmative Action Goal and Minority Placement Rates *Planning Year #1***: Each LHA is required to determine an Affirmative Action Goal reflecting the goal share of minority households within the LHA's tenant population. LHAs must also enter current tenant data regarding the racial composition of their tenant population. CHAMP will automatically calculate a Placement Rate necessary to fulfill the LHA's Affirmative Action Goal based on the status of the LHA's current tenant data. For details on Affirmative Action Goals and Placement Rates, refer to [PHN 2021-14](#). For step-by-step instructions on how LHAs should use the Fair Housing Form in CHAMP, refer to CHAMP Technical Update 28 – CHAMP PMR Criteria 3.

It is important that LHAs complete this prior to the start of their next FYE on or after 6/30/22 so that they can implement any Minority Placement Rates during the following FY. Progress made towards the LHA's Affirmative Action Goal will be reviewed during the PMR for FYE 6/30/23-3/31/24 (CHAMP PMR Criteria 3 Planning Year #2).

Please contact your Housing Management Specialist with any questions.

Appendices

Appendix A: Certification and Training Options

Appendix B: Biennial Year 2 LHAs

Appendix A.
Certification and Training 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/Skill

Appendix B.
BIENNIAL YEAR 2

The following LHAs will have a PMR in the FY2022 (6/30/22-3/31/23) cycle. Additional LHAs identified per the scoring model in the bottom 10% of the 3/31/22 cohorts will join the below LHAs with PMRs in the 2022 cycle.

Biennial PMRs Year 2 LHAs FYE 06/30/2022-03/31/2023	
Acushnet Housing Authority	Acton Housing Authority
Agawam Housing Authority	Adams Housing Authority
Arlington Housing Authority	Andover Housing Authority
Avon Housing Authority	Auburn Housing Authority
Bellingham Housing Authority	Bedford Housing Authority
Blackstone Housing Authority	Braintree Housing Authority
Bridgewater Housing Authority	Burlington Housing Authority
Canton Housing Authority	Carver Housing Authority
Chatham Housing Authority	Chelmsford Housing Authority
Clinton Housing Authority	Concord Housing Authority
Danvers Housing Authority	Dartmouth Housing Authority
Dedham Housing Authority	Dennis Housing Authority
Dighton Housing Authority	Dracut Housing Authority
East Bridgewater Housing Authority	Easthampton Housing Authority
Essex Housing Authority	Fairhaven Housing Authority
Fitchburg Housing Authority	Foxborough Housing Authority
Gloucester Housing Authority	Grafton Housing Authority
Greenfield Housing Authority	Halifax Housing Authority
Granby Housing Authority	Hatfield Housing Authority
Hampden Housing Authority	Harwich Housing Authority
Holbrook Housing Authority	Holyoke Housing Authority
Holliston Housing Authority	Hopkinton Housing Authority
Hopedale Housing Authority	Leicester Housing Authority
Lawrence Housing Authority	Leominster Housing Authority
Lenox Housing Authority	Lowell Housing Authority
Lexington Housing Authority	Lunenburg Housing Authority
Ludlow Housing Authority	Malden Housing Authority
Lynnfield Housing Authority	Marlborough Housing Authority
Manchester Housing Authority	Melrose Housing Authority
Maynard Housing Authority	Middleborough Housing Authority
Mattapoissett Housing Authority	Montague Housing Authority
Mendon Housing Authority	Needham Housing Authority
Merrimac Housing Authority	Newton Housing Authority
Middleton Housing Authority	North Andover Housing Authority
Nantucket Housing Authority	North Attleborough Housing Authority
Natick Housing Authority	North Reading Housing Authority
New Bedford Housing Authority	Northborough Housing Authority
Norfolk Housing Authority	Oxford Housing Authority
North Brookfield Housing Authority	Pembroke Housing Authority
Northampton Housing Authority	Provincetown Housing Authority

Norwood Housing Authority	Randolph Housing Authority
Peabody Housing Authority	Rockport Housing Authority
Plainville Housing Authority	Salisbury Housing Authority
Quincy Housing Authority	Scituate Housing Authority
Raynham Housing Authority	Shelburne Housing Authority
Reading Housing Authority	Southbridge Housing Authority
Rowley Housing Authority	Spencer Housing Authority
Sandwich Housing Authority	Stoneham Housing Authority
Seekonk Housing Authority	Swansea Housing Authority
Sharon Housing Authority	Templeton Housing Authority
Shrewsbury Housing Authority	Wakefield Housing Authority
Southwick Housing Authority	Watertown Housing Authority
Stockbridge Housing Authority	West Bridgewater Housing Authority
Stoughton Housing Authority	West Springfield Housing Authority
Taunton Housing Authority	Westfield Housing Authority
Tewksbury Housing Authority	Wilbraham Housing Authority
Walpole Housing Authority	Wilmington Housing Authority
Webster Housing Authority	Winchester Housing Authority
Wellesley Housing Authority	Woburn Housing Authority
West Brookfield Housing Authority	Wrentham Housing Authority
Westborough Housing Authority	Winthrop Housing Authority
Whitman Housing Authority	Williamstown Housing Authority
Winchendon Housing Authority	Worcester Housing Authority