



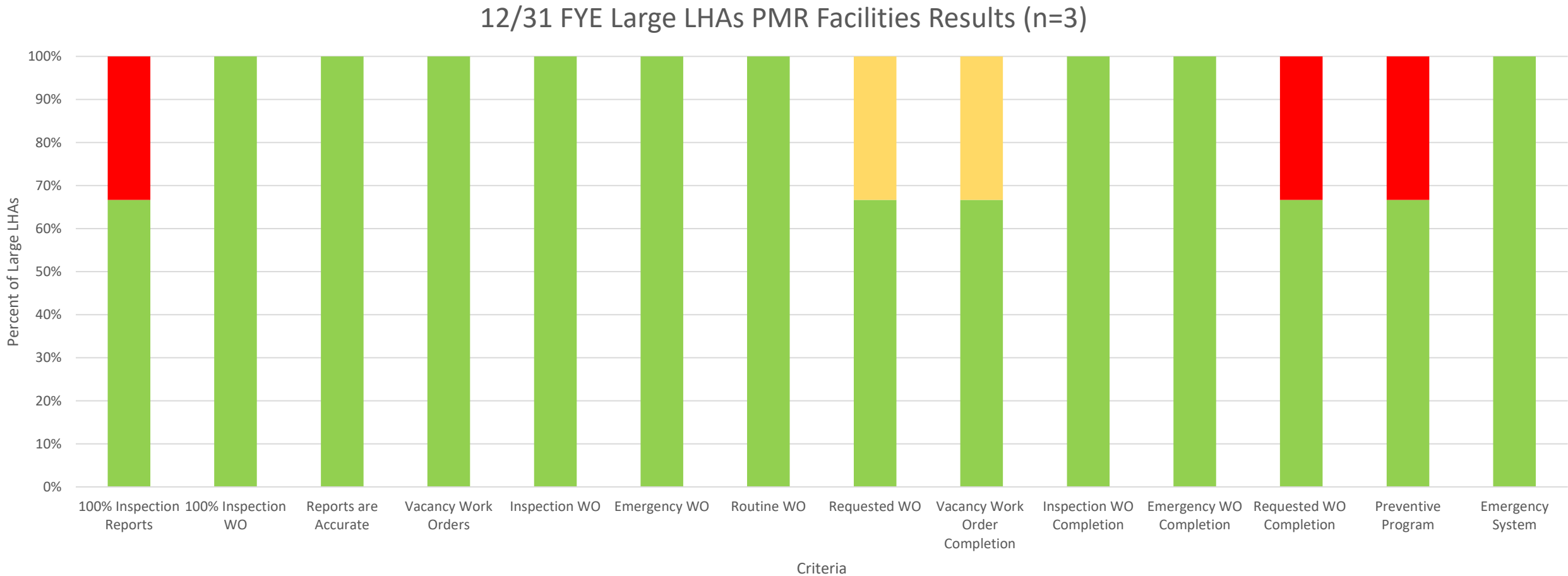
The PMR – First impressions of the first results.

Common Quote: “That wasn’t as bad as I thought it would be!”

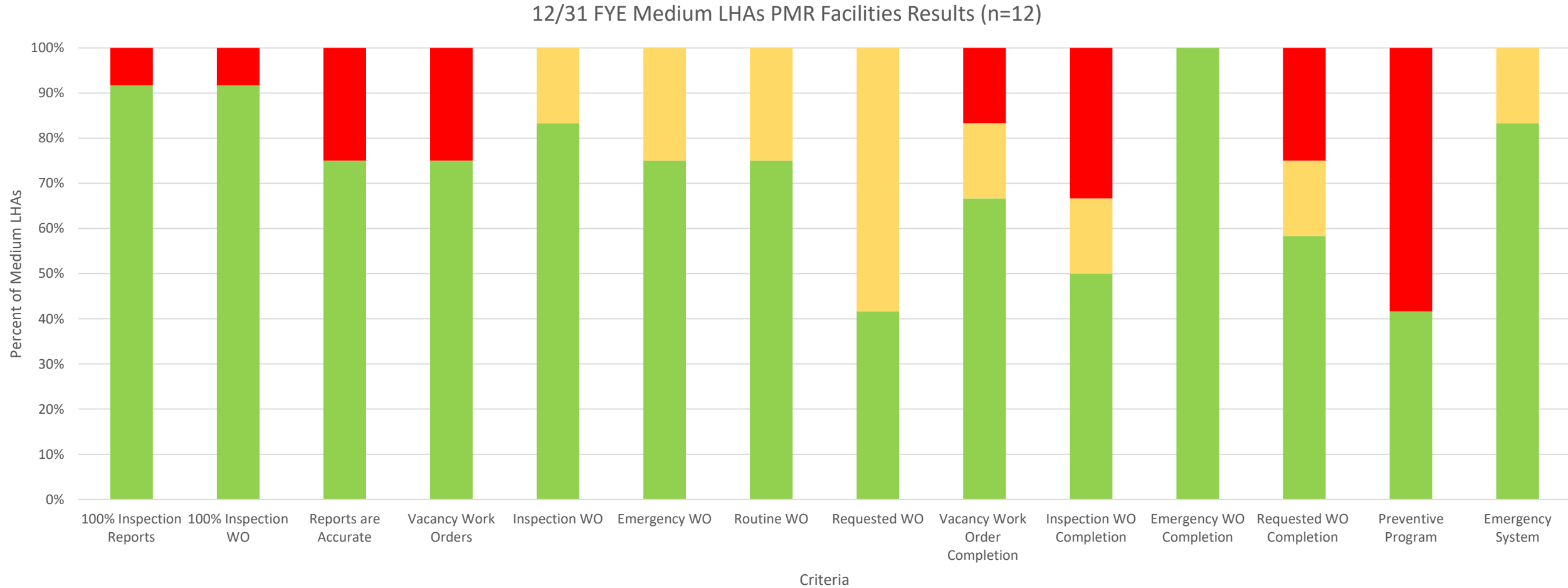
# Performance Management Review - Data

- Agenda
  - Now that the PMR has kicked off - Lets look at the data
  - Compare each criteria with the results so far.
  - Where do we need the most work?
  - What are some positive takeaways?
  - Question and Answer's.

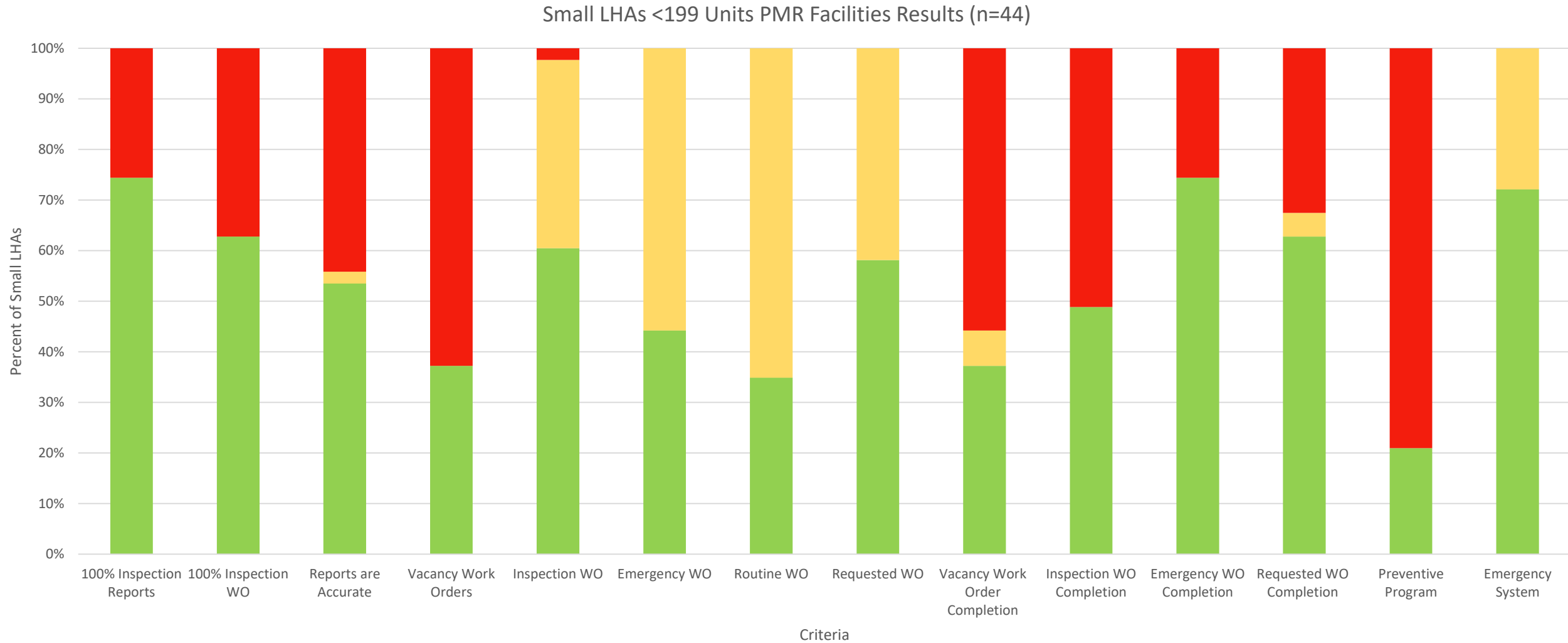
# PMR Data – Large LHA’s - Sample size = 3



# PMR Data – Medium LHA's - Sample size = 12

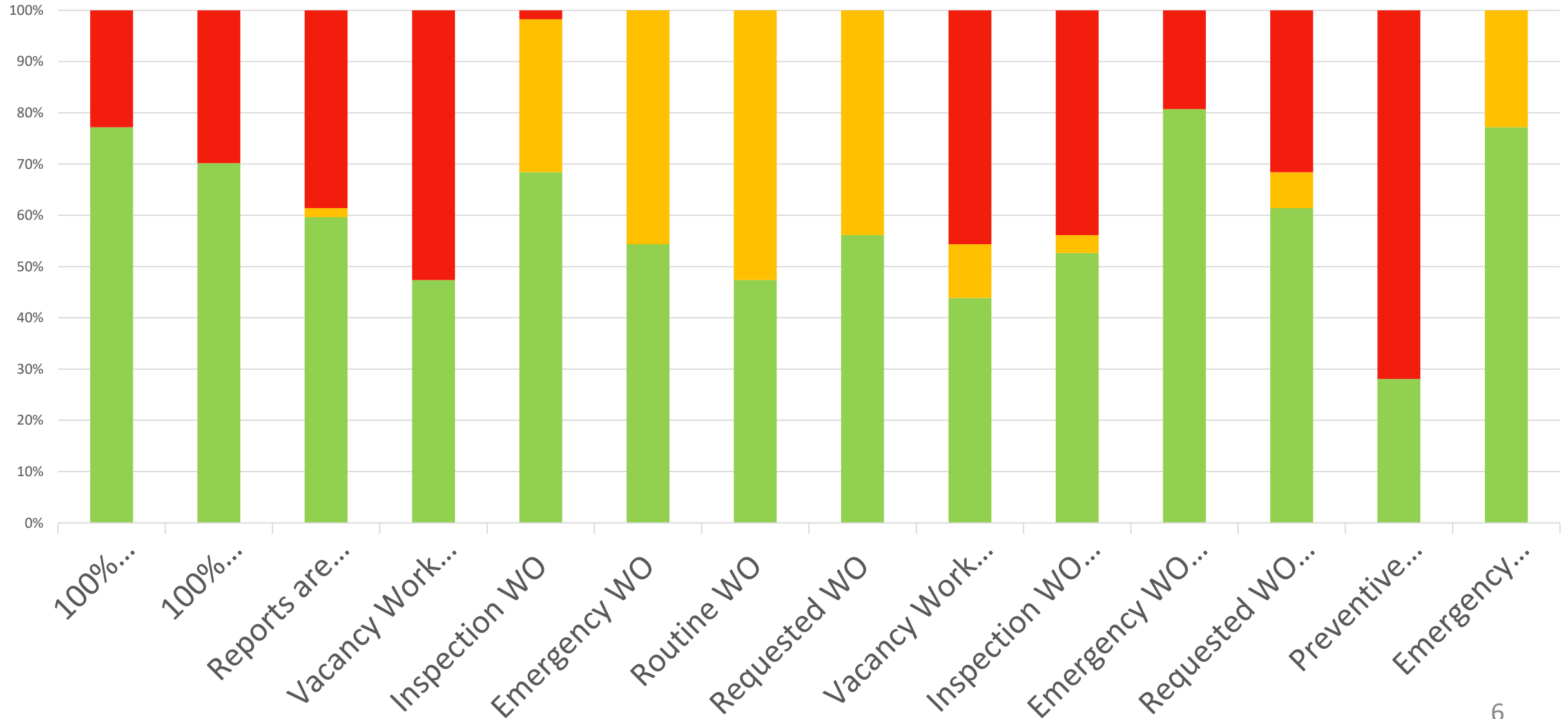


# PMR Data – Small LHA's - Sample size = 44

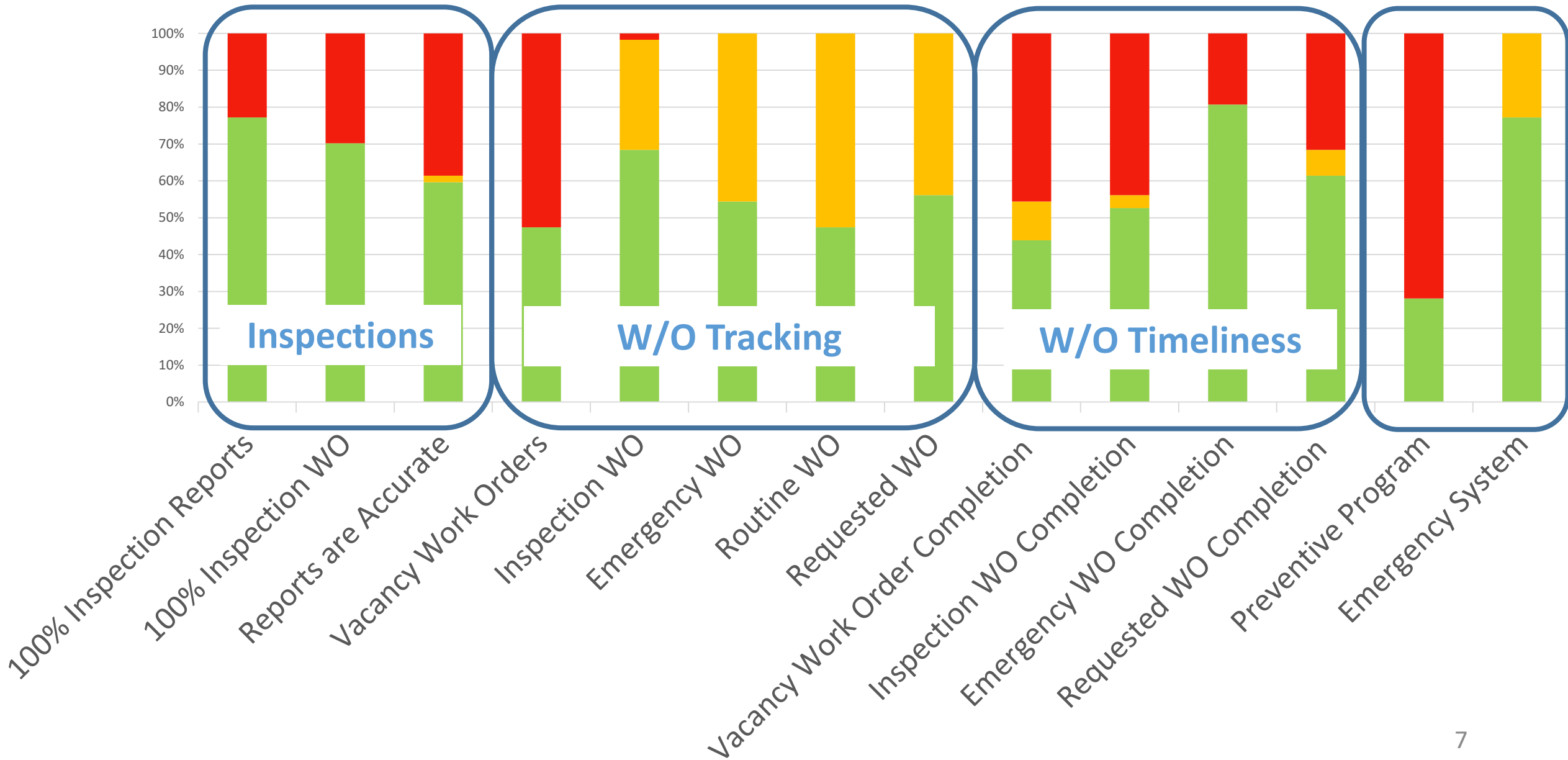


# PMR Data – FYE 12/31/16 – Sample size = 57

Distribution of Facilities Site Visit Ratings: 12/31 FYE n=57 LHAs



# PMR Data – Group Results



# Performance Management Review

- Annual Inspection Requirement
  - 760 CMR
    - **38.09: Responsibilities of the LHA**
      - The LHA shall:
        - (5) Inspect the Unit on an annual basis.
- 44 Out of 57 LHA's were able to show that they completed Annual Inspections



# PMR Inspection Criteria

**DHCD FMS will look at a random sampling of Inspection Reports and corresponding Work orders.**

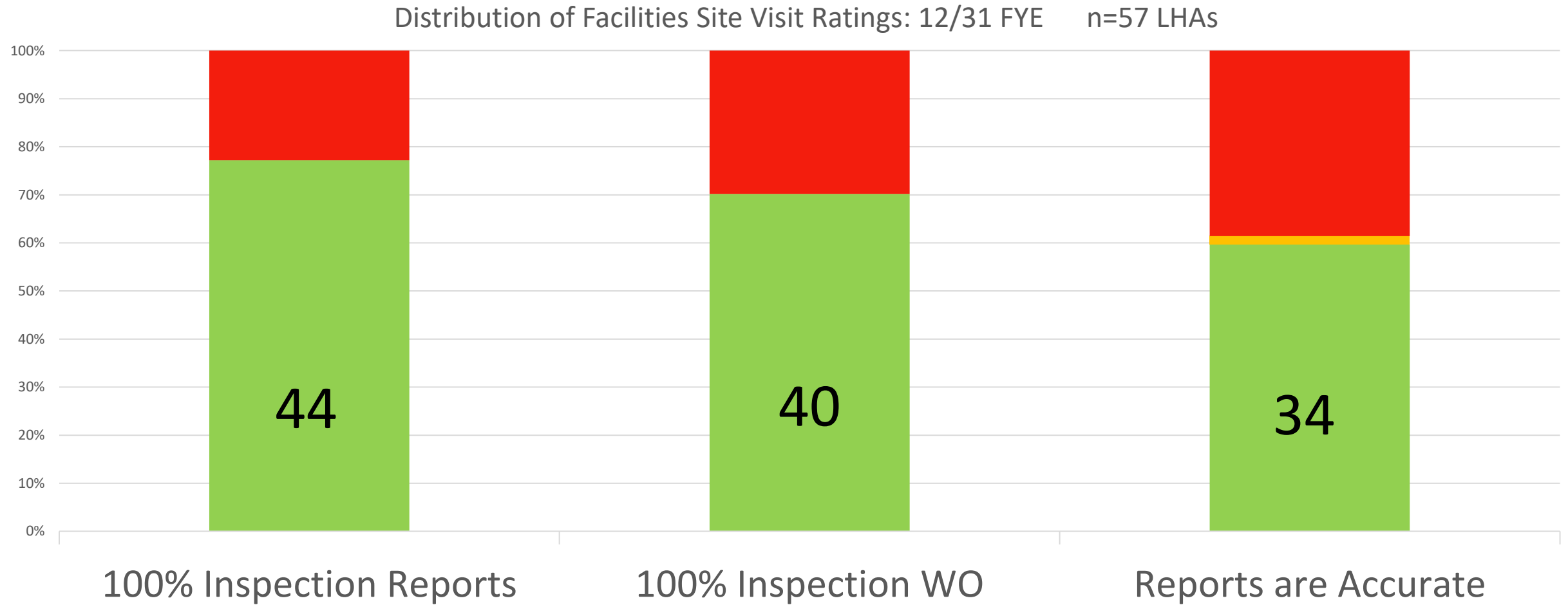
**Annual  
Inspections**

**Conducted 100% of Annual Inspections**

**100% of Inspection-Related Work Orders Generated**

**Inspections Noted 100% of Necessary Repairs**

# PMR Data – Annual Inspections



# Work Order Tracking and Timeliness

Vacancy Work Orders - Identified, Tracked & Reportable

Vacancy Work Orders are Completed Within 30 Calendar Days or LHA has a Waiver

Inspection Work Orders - Identified, Tracked & Reportable

Inspection Work Orders are Complete Within 30 Calendar Days

Emergency Work Orders Identified, Tracked, Reportable

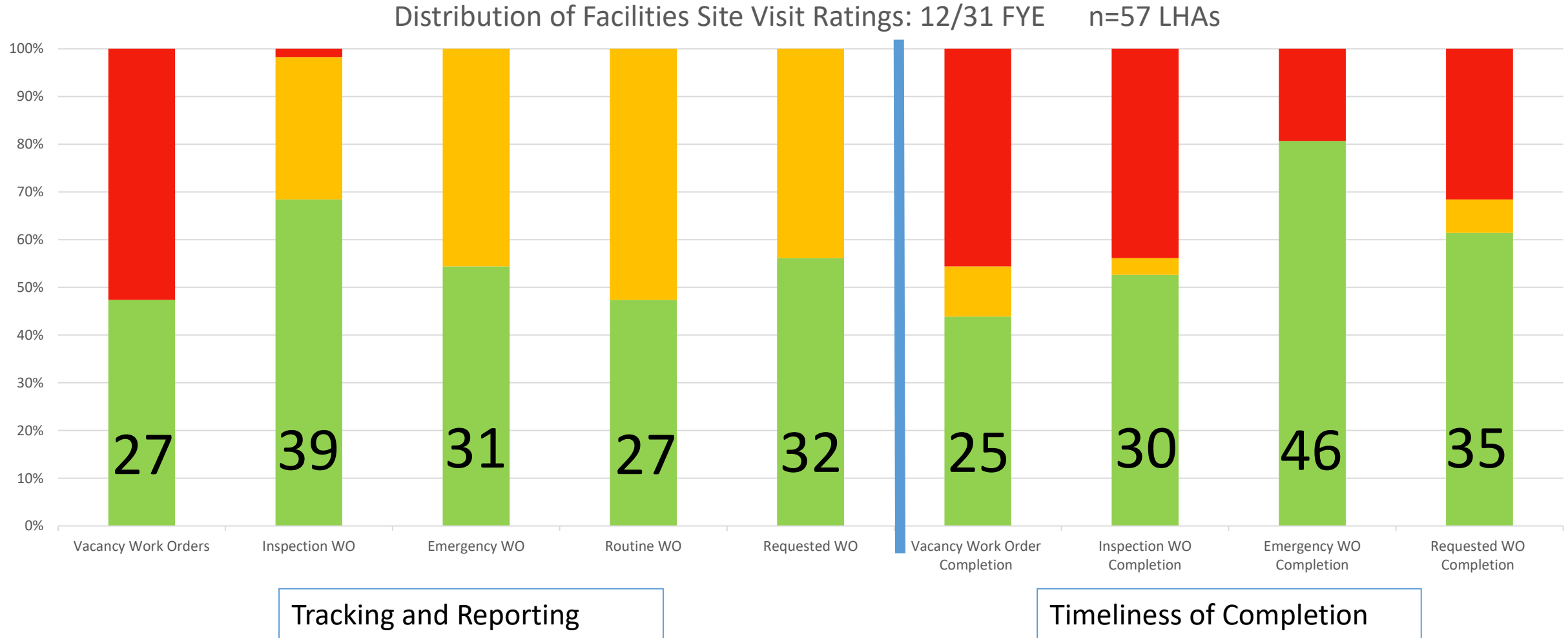
Emergency Work Orders are Initiated Within 24-48 Hours

Routine Work Orders Identified, Tracked, Reportable, and Completed Regularly

Requested Work Orders are Complete Within 14 Calendar Days

Requested Work Orders are Identified, Tracked and Reportable

# PMR Data – Work Order Tracking and Timeliness



# Preventive Maintenance Plan and Work Orders

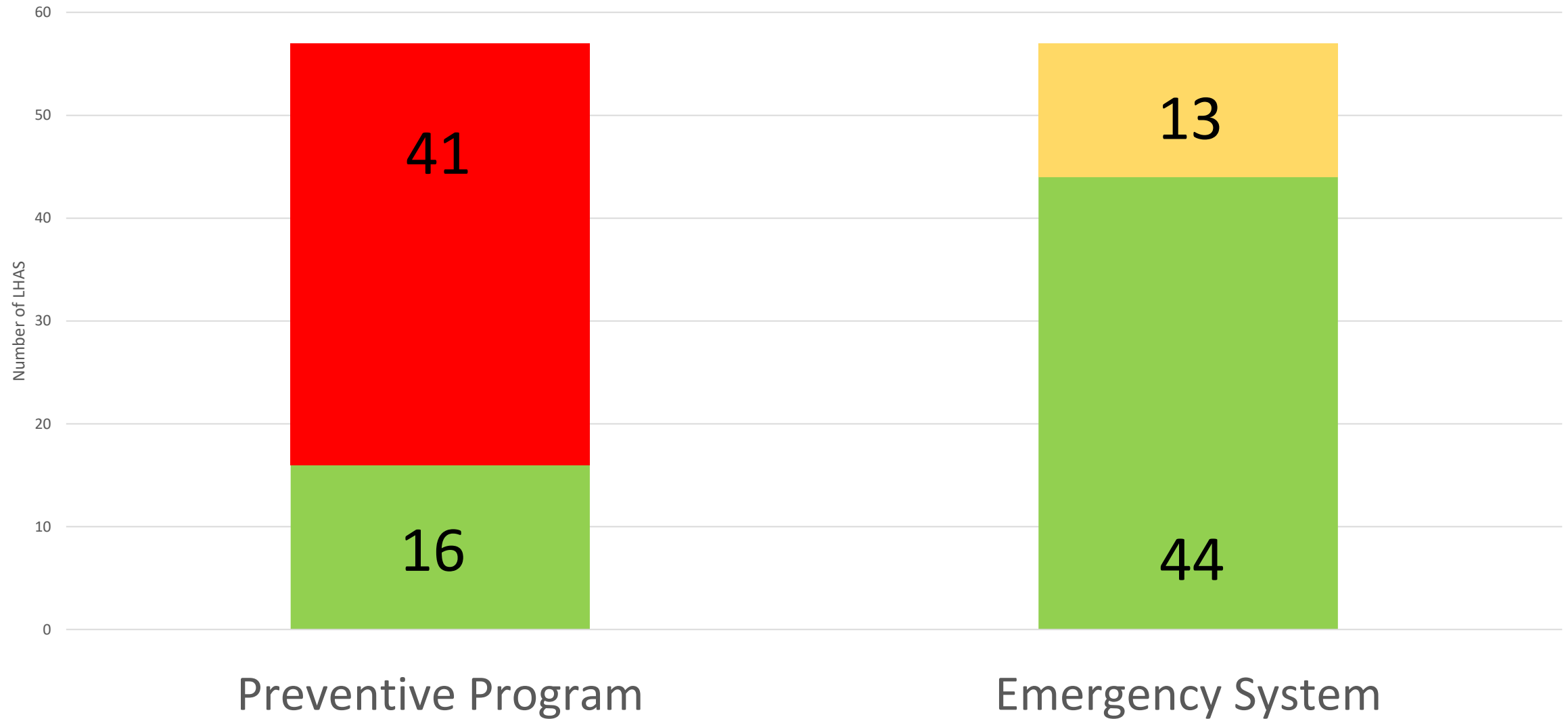
**Preventive Maintenance (PM) Plan** - Every LHA should have a working preventive maintenance plan in order to preserve and extend the useful life of materials, equipment, fixtures and other elements of a housing development.

Be prepared to provide DHCD FMS with your PM plan.

Be prepared to provide DHCD FMS with a list of work orders from your PM plan.

# PMR Data – Preventive Maintenance and Emergency System

12/31 FYE PMR Facilities Review Results (n=57)



# PMR Work Order Systems Criteria

**24 Hour Emergency System** – There exists an after-hours on call system to respond to emergency maintenance requests 24 hours a day and document the results of that response.

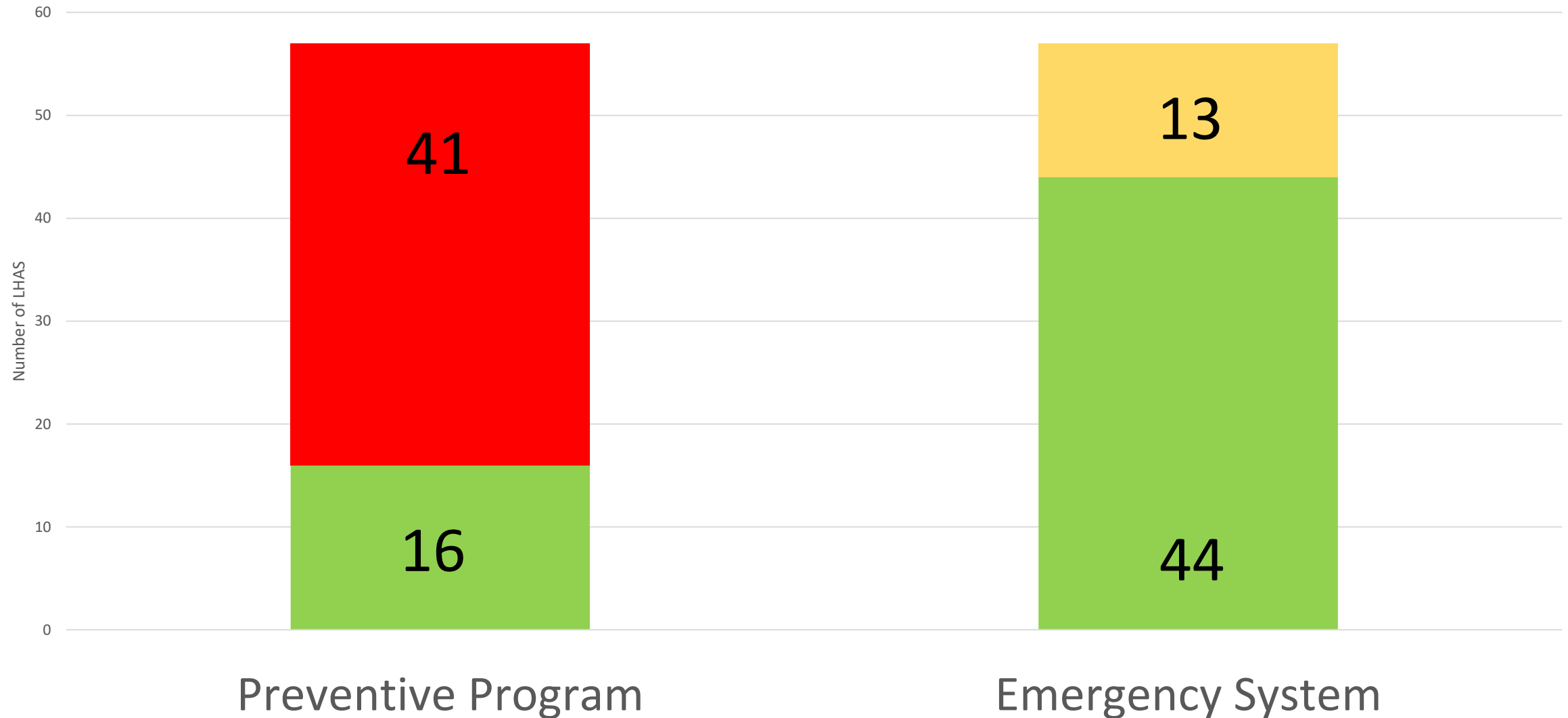
Residents, staff and call service should have a clear definition of what an emergency is.

PMR Question:

Has LHA Distributed A Definition of An Emergency to ALL Tenants, Staff, and Answering Service If Have One?

# PMR Data – Preventive Maintenance and Emergency System

12/31 FYE PMR Facilities Review Results (n=57)





# Property Maintenance Guide - PMG

## Chapter 2 – Work Orders

A Work Order System records What Needs to Be Done and What was Done.

- A Planning and Monitoring Tool for Management
- Documents needs and quantifies personnel and material
- Provides a Database for projecting Staff and Material needs

## **Work Order System Advantages**

**When a maintenance program is fully developed and conducted exclusively through work orders, you will realize the following benefits:**

- 1. Efficient and timely service to residents through good scheduling, accurate task description and economical assignment of work force and materials.**
- 2. Effective personnel administration through documentation of work assignments and the generation of a data base which will support sound personnel decisions.**
- 3. Accountability of task performance for person requesting work; and for supervisors and actual workers.**
- 4. The generation of data that supports a careful and cost effective inventory and purchasing system.**
- 5. Accurate information regarding costs that may be collectible from other parties because of identified misuse, neglect or vandalism, e.g. tenant damage billing.**
- 6. Data for updating the Capital Improvements Inventory System (CIIS) and generally planning for short and long range modernization activities.**

**(PMG Pg. 2-4)**

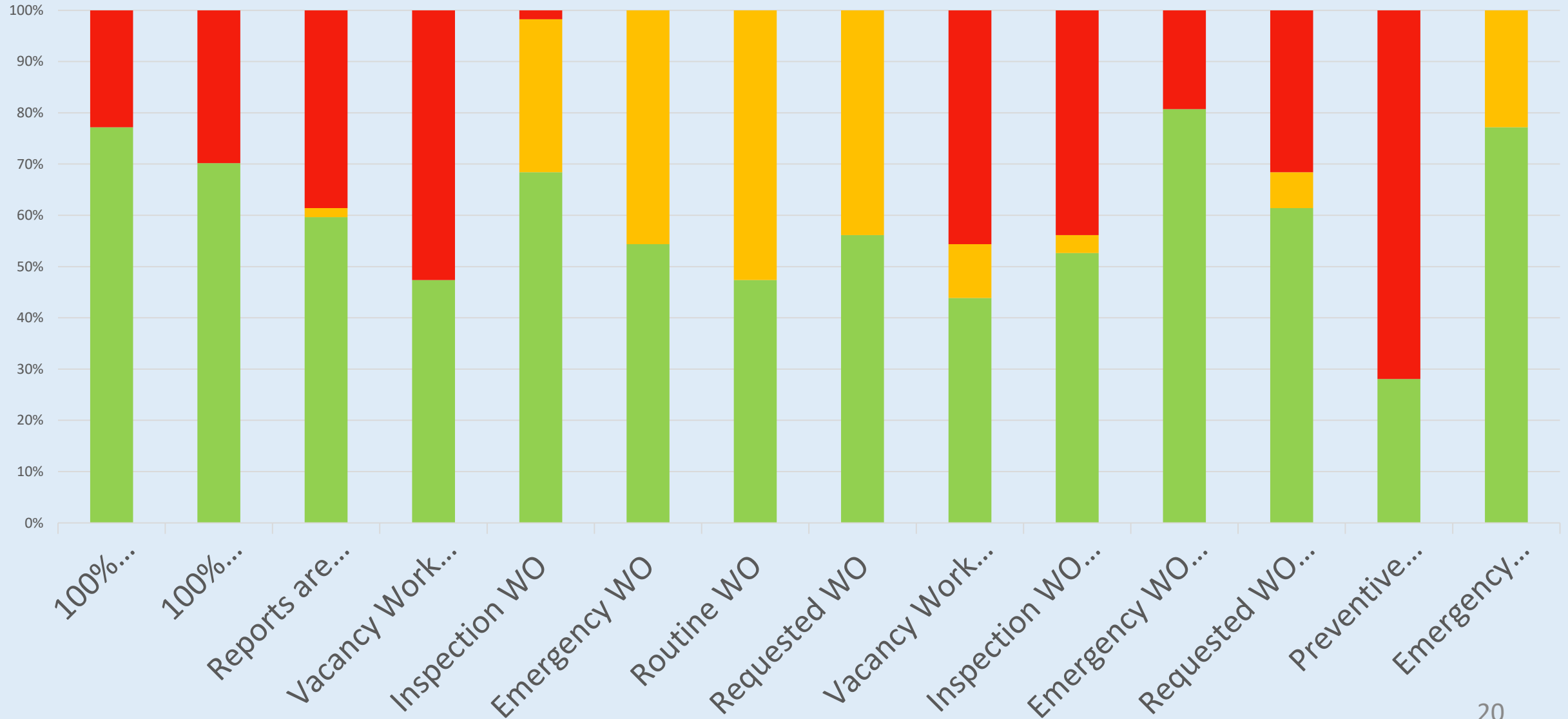
## **Work Order Systems Provide:**

**(PMG Pg. 2-20)**

- 1. Vacancy turnover time and cost**
- 2. Average work hours to complete work order activities**
- 3. Average calendar time from request to completion**
- 4. Productivity of staff**
- 5. Distressed physical components that need to be added to the modernization program**
- 6. Equipment needs and timing**
- 7. Timing of purchasing requirements**
- 8. Current inventory status**
- 9. Origination of work requests.(i.e. Emergencies, Inspections, Routine Maintenance, Preventive Maintenance Program, Requests)**
- 10. Staff skills needed**
- 11. Historical record of repairs by address**
- 12. The cost of maintenance services by priority category  
(e.g. Emergency, Preventive, Request), type  
(e.g. unit, grounds, mechanical space)**

# PMR Data – FYE 12/31/16 – Sample size = 57

Distribution of Facilities Site Visit Ratings: 12/31 FYE n=57 LHAs



# First Impressions

- Common quote – “That wasn’t as bad as I thought it would be”
  - Offering a helping hand not a citation
- Takeaways
  - A little tweaking is more likely than total revamping
  - No one likes change but there are benefits to good data input
  - Support will be tailored to the specific needs as more data is collected
  - It is likely that the ratings will improve now that expectations are clear

# Follow-Up

- DHCD staff to work with LHA on recommendations that were sent after site visit
- DHCD to provide technical support and follow-up, as needed
- First Year: Planning Year & the Results Will Not Be Published
- Will use data to identify trends (state-wide) and provide support—technical support, guidance and/or policy development.

QUESTIONS?

*THANK YOU!*