

Performance Management
Review (PMR) Updates effective
6/30/2025

All LHA Call
June 18, 2025



Welcome new EOHLC staff!

- ▶ Sean Pope, Facilities Management Supervisor
- ▶ Adreinne Danner, Facilities Management Specialist
- ▶ Gerson Citron, Facilities Management Specialist
- ▶ Charmaine Massey, Housing Management Program Operations Supervisor

Thank you for being here!

Please mute yourself. Please be advised that recording meetings, by any means, including the use of any A.I. applications, without prior permission is strictly prohibited.

- ▶ Yes, we will share the slide deck after the call :)

Questions

- ▶ Please drop questions in the chat during the presentation
- ▶ We will pause periodically for questions during the presentation
- ▶ There is Q&A time at the end
- ▶ Specific and unique questions about your LHA, may be answered individually after the presentation- outside of the chat

Housekeeping



▶ **Presenter**

Courtney Curran (she/hers)

Assistant Director, Bureau of Housing
Management

Introductions



Performance Management Review (PMR)

- ▶ Provide overview of context
- ▶ Review overall LHA performance across the state
- ▶ Highlight changes to PMR effective 6/30/2025

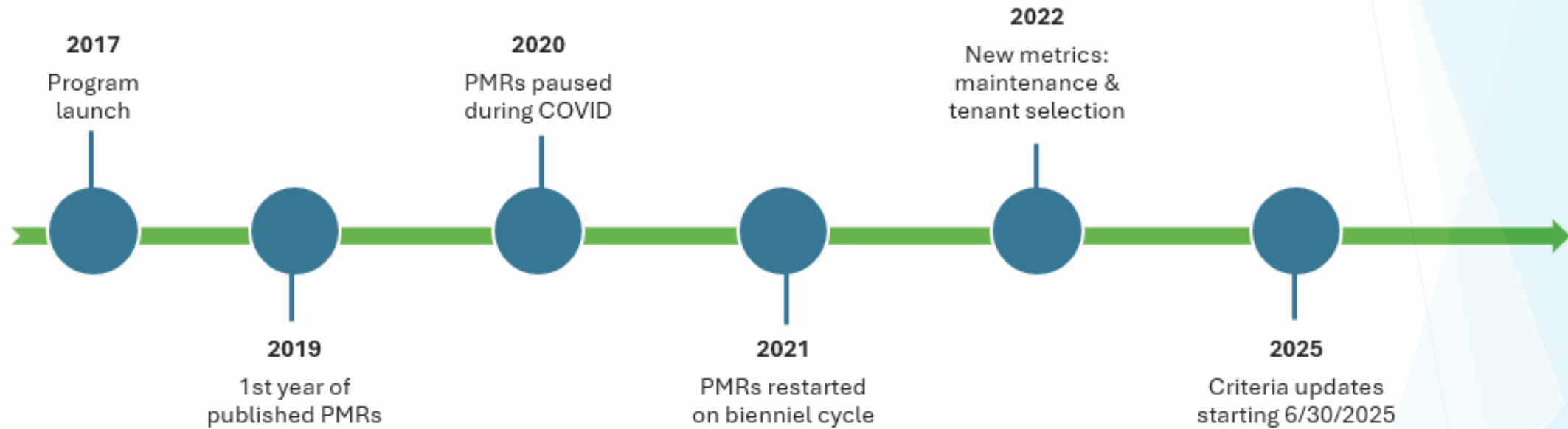
Goals

PMR Legislative Context

In 2014, Chapter 235, “[An Act Relative to Local Housing Authorities](#)” was signed included a new law (M.G.L. Ch. 121B, Sec. 26B)

- ▶ Required the Executive Office of Housing and Livable Communities (EOHLC) establish and implement an annual performance-based monitoring program that evaluates key operational benchmarks at Local Housing Authorities (LHAs).
- ▶ EOHLC, in conjunction with external stakeholders, developed the Performance Management Review (PMR) program.

Evolution of the PMR



Divided into two main sections:

- ▶ Administrative
 - Desk review – based on data and reports submitted through out the year to EOHLC
 - Tenant Selection/ CHAMP
 - Staff Training
 - Capital CFA submission

- ▶ Physical Conditions/ Maintenance
 - On-site inspections
 - Review of Inspection Reports and Work Orders – emergency, vacancy, inspection, preventive maintenance, tenant requested

Overview of PMR

- ▶ Shifted focus from work order administration to a blended review that placed higher emphasis on actual property conditions.
- ▶ Consolidated PMR facilities criteria, going from originally 14 to 9 metrics.
- ▶ Programming change to eliminate cascading resulting from late report submissions and in maintenance criteria
- ▶ Changed the Budget to Actual criterion to Adjusted Net Income
 - ▶ Continued to refine Adjusted Net Income, effective 6/30, based on Fee Accountant and LHA comments
- ▶ Adopted new strike assignment threshold – moving from bottom 10% per quarter to a threshold score

Impact of your feedback

- ▶ Completing the Fair Housing Form in CHAMP in the final quarter of the FY
- ▶ Uploading documents, required for PMR assessment
 - ▶ Tenant Selection/ CHAMP Applications
 - ▶ Maintenance
 - Inspection Reports- Inspections should fall within FY under review
 - Work Order Reports
 - Preventive Schedule

Key Challenge

Uploading documents

Authority Review Tool

Inspection Reports and Corresponding Work Orders/Issued Notices of Lease Violation

Development	Facility	Unit	Drop file(s) here	Browse...	Filename
[Redacted]	[Redacted]	36	Drop file(s) here	Browse...	3600m WO prep.pdf
[Redacted]	[Redacted]	64	Drop file(s) here	Browse...	6400m WO prep.pdf
115-117 CENTER STREET	115-117 CENTER STREET	Unit # 117	Drop file(s) here	Browse...	117 center st.pdf
DEPOT COURT	DEPOT CT - 1	13	Drop file(s) here	Browse...	13DC WO prep.pdf
DEPOT COURT	DEPOT CT - 6	63	Drop file(s) here	Browse...	63DCWO prep.pdf

Vacancy Work Orders

Development	Facility	Unit	Drop file(s) here	Browse...	Filename
[Redacted]	[Redacted]	- 3 21	Drop file(s) here	Browse...	
DEPOT COURT	DEPOT CT - 4	44	Drop file(s) here	Browse...	

Emergency Work Orders

Drop file(s) here	Browse...	Filename
Drop file(s) here	Browse...	emergency wo fy2025.pdf

Tenant Requested Work Orders

Drop file(s) here	Browse...	Filename
Drop file(s) here	Browse...	tenant rq wo fy2025.pdf

Deferred Maintenance Work Order Report/Spreadsheet

Drop file(s) here	Browse...	Filename
Drop file(s) here	Browse...	Deferred WO FY2025.pdf

12 Month Preventive Maintenance Schedule

Drop file(s) here	Browse...	Filename
Drop file(s) here	Browse...	

Authority Review Tool

- Inspection Reports ✓
- Vacancy Work Orders ✓
- Emergency Work Orders ✓
- Tenant Requested Work Orders ✓
- Deferred Maintenance Work Order Reports/Spreadsheets ✓
- 12 Month Preventive Maintenance Schedule ✓
- LHA Staff Training Certification ✓
- DHAMP Criteria TB ✓
- DHAMP Criteria DR ✓
- LHA Questionnaire ✓

Send Feedback
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Uploading documents

Top

- Inspection Reports
- Emergency Work Orders
- Emergency Work Orders
- Special Resourced Work Orders
- Deferred Maintenance Work Order Report/QueueSheet
- 12 Month Periodic Maintenance Schedule
- LHA Staff Training Certification
- CHAMP Criteria 1B
- CHAMP Criteria 2A
- LHA Questionnaire

Previous PRAs

- Mar 2023
- Mar 2022
- Mar 2021

LHA Staff Training Certification

By clicking entering my name below, I certify that this LHA has correctly completed the Staff Training and Certification requirements of this PRA as outlined in PHS 2022-08 and other related guidelines. Scan the receipt of SO-SC, I will provide copies of the associated verification materials as outlined in PHS 2022-01.

Certified By: _____

[Save](#)

CHAMP Criteria 1B (Paper Applications)

Applicant ID	Applicant Name	Filename	Drop file(s) here	Print...
608171883	██████████		Upload	Print...
608905878	██████████		Upload	Print...
418000880	██████████		Upload	Print...
824176204	██████████		Upload	Print...
640091880	██████████		Upload	Print...

CHAMP Criteria 2A (Tenant Management Files)

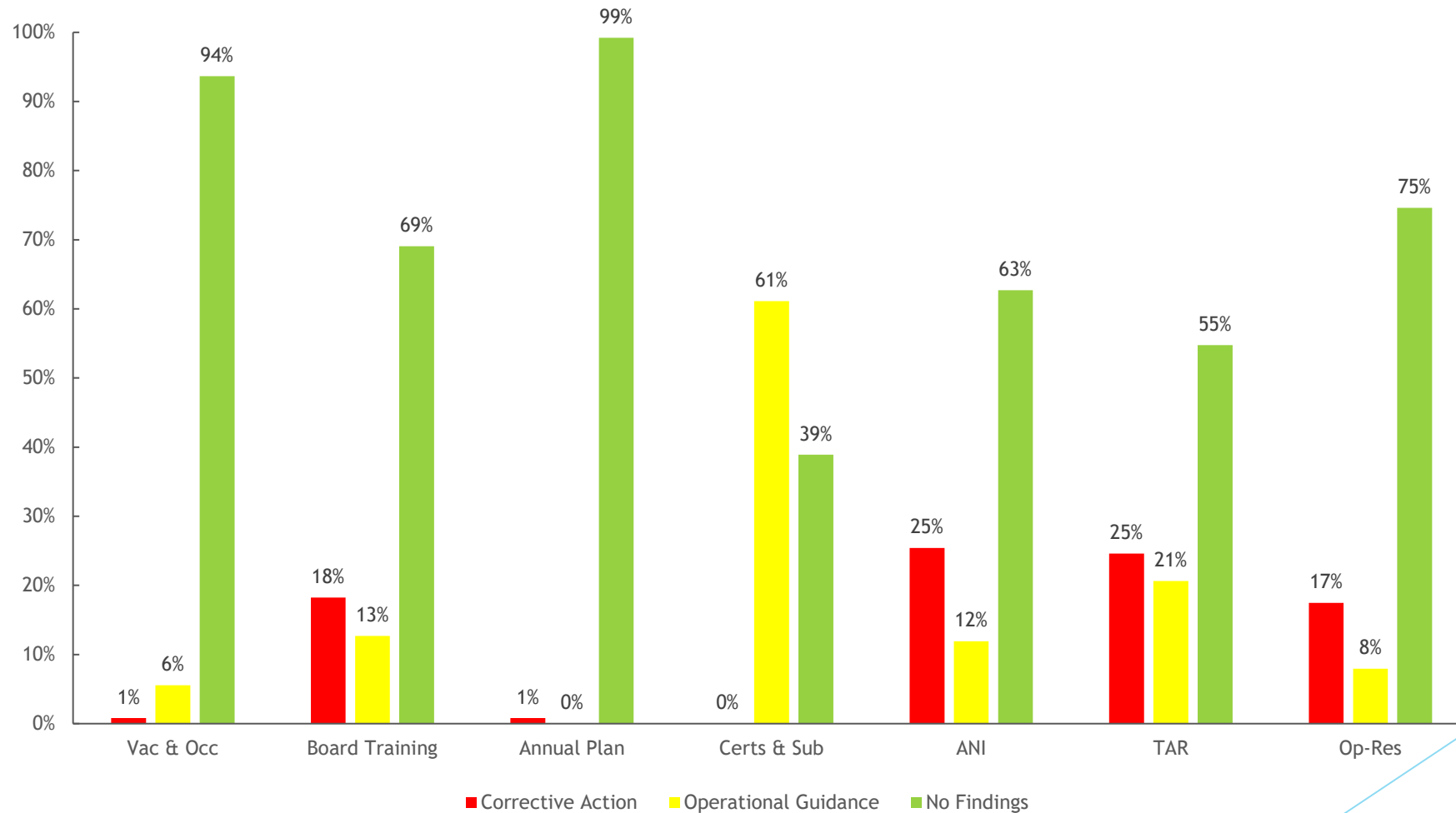
Filename	Uploaded On	Drop file(s) here	Print...
File Tenant Management Files uploaded: 0/4		Upload	Print...

Uploading documents

- ▶ Instructions are in the announcement letter and the scheduling letter
- ▶ CyberSense can provide one on one assistance if needed
- ▶ Best practice: most successful when one person is the point person to do the task or to confirm that assigned staff are completing the task.
- ▶ What else can we do to encourage uploading documents without EOHLC staff prompting?
 - ▶ Drop ideas in the chat or email your HMS or FMS

PMR Administrative Performance

Desk Audit PMR Ratings 3/31/23 - 12/31/24 FYEs

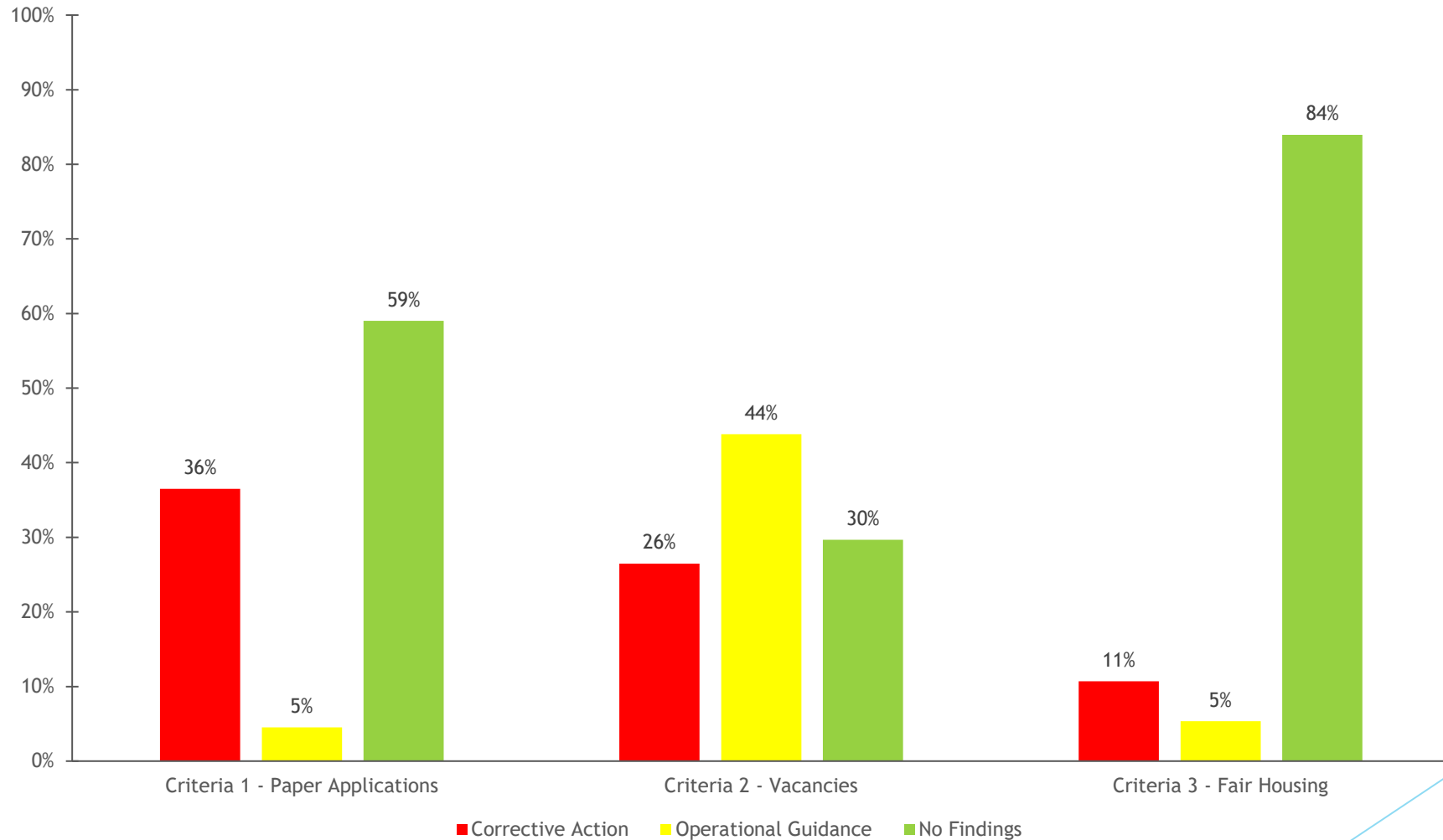


PMR Administrative Performance Recap

- ▶ LHA perform best:
 - Timely Annual Plan submission
 - Cumulative Adjusted Occupancy Rates above 98%
- ▶ Areas needing continued support and technical assistance:
 - Consistent timely entry of Certification and Submissions
- ▶ Area to watch: Will overall ANI, TAR, OR ratings improve when late reporting has less impact on the calculation?
 - May see the impact in data in a year (reviewing data for 6/30/2025 - 3/31/2026)

Tenant Selection/CHAMP Performance

CHAMP PMR Ratings 6/30/23-12/31/24 FYEs

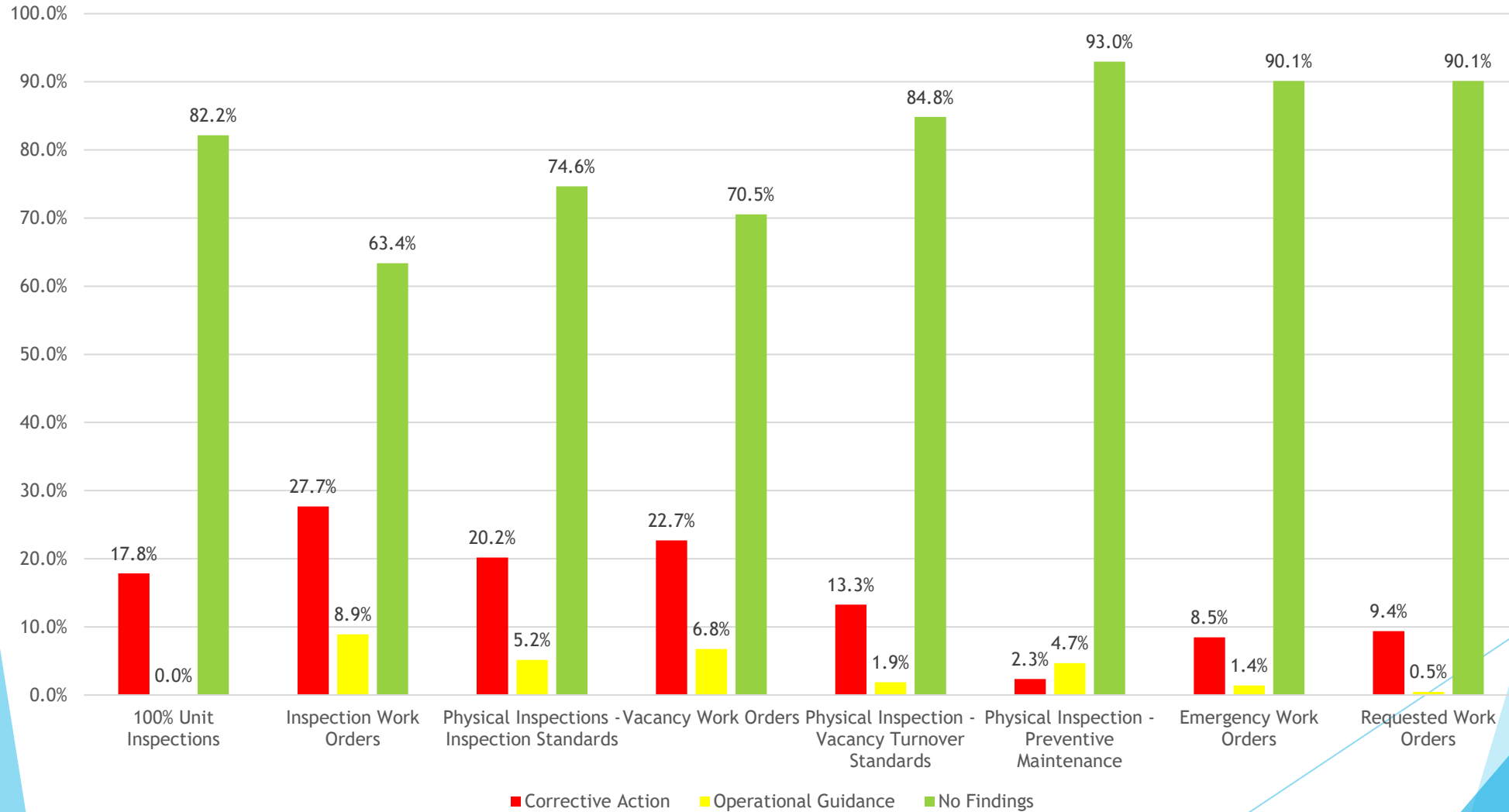


Tenant Selection/CHAMP Performance Recap

- ▶ Tenant Selection metrics are newer to PMR
- ▶ Criteria rolled out through a series of planning years
- ▶ Varied performance across LHAs
- ▶ Consistent data entry across two systems is challenging (i.e., between the Vacancy Ledger and CHAMP)
- ▶ Continued EOHLC technical assistance and guidance needed

PMR Facilities Performance

PMR Maintenance Criteria 6/30/23-12/31/24



Physical Condition Performance Recap

- ▶ LHAs scored VERY well in 3 criteria!
 - ▶ Preventive Maintenance
(Inspections of Exteriors, Building Systems, Common Areas)
 - ▶ **93% No Findings**
 - ▶ Tenant Requested Work Orders
(Work Completed within 14 days)
 - ▶ **90% No Findings**
 - ▶ Emergency Work Orders
(work completed within 48 hours)
 - ▶ **90% No Findings**

PMR Facilities Performance Recap

- ▶ Inspection Forms and Work Orders
 - Use acceptable form
 - Dated within FY under review
 - All work cited during an inspection results in a work order and/or lease follow-up.
 - All work is completed within correct timeframe
- ▶ Vacancy Work Orders
 - All work performed in a vacant unit must be reflected on a vacancy work order.
 - Vacancy must be turned over in less than 30 days (c.667), 45 days (family), or have an approved waiver in place.

PMR in the Future

- ▶ Cycle 25 Changes (effective 6/30/25)
- ▶ Announced in October 2024
 - ▶ [Public Housing Notice 2024-19](#): Updates to Performance Management Review (PMR) for 2025 Cycle (FYE 6/30/2025 - 3/31/2026)
- ▶ Further guidance for new Preventive Maintenance Criteria issued May 2025
 - ▶ [Public Housing Notice 2025-06](#): Preventive Maintenance Planning Year Criteria

PMR in the Future

- ▶ Cycle 25 Changes (effective 6/30/25)
 - ▶ ANI changes – updating the calculation and threshold
 - Change will remove penalty for variability of retained revenue
 - ▶ Address PMR score cascading
 - ▶ Changes to scoring weighting
 - Maintenance from 44% to 50% of total score
 - Physical conditions on site from ~25% to ~33% of total score
 - ▶ EOHLC physical inspection sample size will increase based on LHA size
 - ▶ Units inspected by EOHLC will be selected at random on the day of the PMR
 - ▶ New Criteria: planning year for Preventive Maintenance administrative review

Updates to Desk Audit Criteria effective 6/30/2025 PMRs



KEY CHANGE:

Adjusted Net
Income

DETAILS

▶ Changing Threshold

- ▶ Change threshold from 10% to 15% variance
- ▶ No longer looking at those with a negative variance

▶ Updating Calculation

- ▶ Adjust the calculation by reducing income by revenue listed in:
 - ▶ a/c #3693 in - Other Revenue - Energy Net Meter
 - ▶ a/c #3691 Other Revenue Retained
- ▶ These accounts are hard to forecast and changes due to utility prices and weather led to LHAs exceeding the variance threshold.

Adjusted Net Income (ANI) New Calculation

Account #		Class
2700		Net Income
3691	- (subtract)	Other Revenue Retained *CHANGE*
3693	- (subtract)	Other Revenue - Energy Net Meter *CHANGE*
4611	+ (add)	Equipment Purchases - Non Capitalized
4541	+ (add)	GASB- Employee Benefits
4542	+ (add)	GASB- Pension Expense
4610	+ (add)	Extraordinary Maintenance
4801	+ (add)	Depreciation Expense
	= (equals)	Adjusted Net Income
4000	/ (divide)	Total Expenses
	= (equals)	Adjusted Net Income as a % of Total Expenses

KEY CHANGE:

Address PMR score cascading

DETAILS

- ▶ Currently, not performing in one measure may cause a ripple or cascade to receive Corrective Action in another measure
- ▶ EOHLC will minimize the cascading effect of late submissions of reports has on PMR criteria – ANI, Operating Reserve, TAR, and certain inspection criteria.

KEY CHANGE:

Update our scoring methodology

DETAILS

- ▶ Total PMR score =
 - ▶ 50% - Physical Conditions and Procedures
(an increase from 44%)
 - ▶ 50 % - Administrative Functions
(a decrease from 56%)
- ▶ Values for Individual measures will have consistency, with few criteria weighted
- ▶ Weighted criteria include:
 - ▶ Overall Occupancy and 3 Physical Conditions criteria, which are based on inspections performed by EOHLC staff

Updates to Maintenance Criteria effective 6/30/2025 PMRs



KEY CHANGE:

The sample size for physical inspection will increase, based on LHA size.

WHY?

- ▶ Greater number of units inspected ensures safe and sanitary housing
- ▶ Biennial cycle allows EOHLC staff more time on-site for additional review and technical assistance

Physical Inspection Sample by LHA Size

LHA SIZE	CURRENT	NEW
Small (1-199 Units)	7 administrative reports 3 physical inspections	7 administrative reports <i>7 physical inspections</i>
Medium (200-499 Units)	10 administrative reports 4 physical inspections	10 administrative reports <i>10 physical inspections</i>
Large (500-999 Units)	15 administrative reports 6 physical inspections	15 administrative reports <i>15 physical inspections</i>
Very large (1000+ units)	15 administrative reports 6 physical inspections	15 administrative reports <i>Physical Inspection- Minimum of 2 units per development</i>

KEY CHANGE:

Units for inspection will be selected at random on the day of the site visit.

WHY?

- ▶ Industry standard and align with the inspection practices of HUD and other affordable housing funders
- ▶ **All residents must be notified of the upcoming PMR and the possibility of inspection.**
- ▶ Units listed in the announcement letter notice are for administrative review and are unlikely to be selected for the physical inspection

KEY CHANGE:

New Criteria/Planning Year

EOHLC administrative review
of LHA Preventive Schedule

This criteria is not yet final
and subject to change.

WHY?

- ▶ Every LHA should have a comprehensive Preventive Maintenance Plan and schedule of work that includes all the tasks necessary to maximize and preserve existing LHA components
- ▶ Every LHA preventive maintenance schedule must contain the six (6) core components
- ▶ Resource: [PHN 2025-06 Preventive Maintenance Planning Year Criteria](#)

PHN References - PMR

PHN #	SUBJECT	DATE
<u>2016-06</u>	Performance Management Review Preparation	4/6/2016
<u>2016-08</u>	Tenant Satisfaction Survey	4/19/2016
<u>2016-16</u>	Preparing for the PMR: LHA Annual Inspections and Work Order System	6/2/2016
<u>2016-36</u>	Performance Management Review Launch	11/10/2016
<u>2017-15</u>	Tracking PMR in Real Time	7/13/2017
<u>2018-08</u>	PMR Second Year Clarifications	3/21/2018
<u>2019-01</u>	Revisions to PMR Criteria for 1st Publishing Year	1/18/2019
<u>2020-17</u>	Extension of Certain DHCD Required Certifications and Submissions Deadlines	4/13/2020
<u>2020-19</u>	Changes to 12/31/2019 FYE Performance Management Review due to State of Emergency	4/23/2020
<u>2020-25</u>	Temporary Changes to Performance Management Review (PMR) Program	7/1/2020
<u>2020-38</u>	Tenant Selection Criteria in Performance Management Review	11/19/2020
<u>2021-13</u>	Updates to Performance Management Review	2/23/2022
<u>2021-14</u>	CHAMP Fair Housing PMR Criteria	7/14/2021
<u>2021-17</u>	Reasonable Accommodation Policy	8/9/2021
<u>2021-21</u>	Language Access Plan	10/27/2021
<u>2022-03</u>	Fair Housing Marketing Plan	2/10/2022
<u>2022-09</u>	Updates to Performance Management Review (PMR) for 2022 Cycle	6/14/2022
<u>2022-10</u>	Revised PMR Maintenance Metrics	9/28/2022
<u>2023-09</u>	Updates to Performance Management Review (PMR) for 2023 Cycle	7/12/2023
<u>2024-10</u>	Changes to Chief Administrative and Financial Officer (CAFO) Program for AUP starting with FYE 2024 and Updates to Performance Management Review (PMR) for 2024 Cycle	6/27/2024
<u>2024-19</u>	Update to Performance Management Review (PMR) for 2025 Cycle (FYE 6/30/2025 - 3/31/2026)	10/29/2024
<u>2025-06</u>	Preventive Maintenance Planning Year Criteria	5/21/2025

What's next...

- ▶ Goal: Easily accessible, one spot for all PMR info LHAs need
- ▶ EOHLC is combing through the 20+ PHNs and reorganizing into one comprehensive document
- ▶ Anticipated this Fall



Thank you!

Questions?



Need more support

- ▶ Facilities-related
 - ▶ Contact your assigned FMS (quickest response) or EOHLCFMSSupport@mass.gov
- ▶ Administrative-related
 - ▶ Contact your assigned HMS