

Managing your Maintenance and Working out your Work Orders

Overview:

1. Common Maintenance Goals for All Housing Authorities
2. Prioritizing Your Maintenance System
3. PMR
 - a. Process Overview
 - b. Inspection Criteria
 - c. Work Order System Criteria
 - d. Maintenance Reports
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Maintenance Objectives and Goals:

The goal of good property maintenance at a public housing authority is to serve the residents by assuring that the homes in which they live are decent, safe, sanitary and in good repair.

To achieve these goals, you need to have a clearly defined set of Priorities and then develop Procedures and Policies to achieve those objectives.

Keys to an Effective Maintenance Operation:

- Strong Organization
- Consistent Procedures
- Careful Follow Through

DHCD developed and distributed a Property Maintenance Guide (PMG) to all LHAs. The PMG provides a framework for organizing and measuring the effectiveness of your maintenance operation. Copies of the PMG are available upon request from DHCD. An online version will also be available for download on the DHCD website. For immediate download, there is a temporary version available here: <https://goo.gl/FYixel>

(Last letter is a capital i, not a lower case L)

Each Housing Authority may have developed their own strategies that differ from those that are suggested in the PMG. DHCD recommends that LHAs realign their maintenance priorities in accordance with the Property Maintenance Guide (PMG).

Maintenance Priorities

The following list of maintenance categories in suggested order of priority has proven to be the most efficient method for State Housing Maintenance. (Citation: PMG page 1-1)

One of the most significant mistakes you can make in conducting your maintenance operation is to allow it to be driven by requests from people outside the staff rather than by management generated work orders that are part of a planned program.

The following is a list of Maintenance Categories listed in order of suggested priorities for efficiency:

- I. Emergencies - Work which must be done immediately
 - a. Emergencies should be narrowly defined as only those conditions which are immediately threatening to the life or safety of your residents, staff, or structures.
 - b. Examples of Emergencies are: fires of any kind, gas leaks, electric power failure, broken water pipes, sewer blockage, roof drain blockage, roof leak, security lock failure, no heat, inoperative refrigerator, snow or Ice storm, elevator stoppage.
 - c. An Emergency Procedure Guide should include procedures for each type of emergency and be available at each development for the responding worker(s).
 - d. A good Inspection and Preventive Maintenance Program will reduce the occurrence of emergencies.
 - e. The LHA must have a plan for dealing with each type of emergency. (PMG page 1-6)
- II. Vacancy Refurbishment - Work necessary to make empty units ready for new tenants.
 - a. After emergencies the refurbishment of vacancies for immediate re-occupancy should have the highest priority for staff assignments. Everyday a unit is vacant is a day of lost rent.
 - b. A Move-out inspection should be conducted as soon as a notice is given or the vacancy is discovered so cost estimating and scheduling can begin.
 - c. The LHA should consider scheduling improvements that can only be completed during a vacancy. Upgrades to the unit will reduce required maintenance due to emergencies and tenant calls.
 - d. Vacancy work should not be abandoned when a resident makes a maintenance request that is not an emergency.
 - e. The average maintenance time for completing turnovers is 14 days.

- III. Preventive Maintenance - Work which must be done to preserve and extend the useful life of various elements of your physical property and avoid emergency situations.
- a. Develop a thorough Preventive Maintenance Program and Schedule that deals with all elements of the physical property.
 - b. Preventive Maintenance work orders need to be part of your work order delivery system.
 - c. Preventive Maintenance inspections should include all systems, public areas, buildings and grounds.
 - i. Every element of your physical property should be maintained based on manufacturer's suggested schedules, industry standards and technical consultants.
 - ii. When your staff does not include the expertise for a particular system then a professional should be hired to inspect and maintain that system.
 - d. Your Preventive Maintenance Program should be reviewed and updated annually and as new systems and facilities are installed.
- IV. Programmed Maintenance - Work which is important and should be completed to the greatest extent possible within time and budget constraint. Programmed maintenance should be grouped and scheduled to make their completion as efficient as possible.
- a. Sources of programmed maintenance
 - i. Routine Work includes those tasks that need to be done on a regular basis to keep your physical property in good shape.
 - Some examples of routine maintenance would be: picking up litter, sweeping public spaces, cleaning and sharpening tools, attending training sessions, shoveling snow and plowing, raking leaves, maintaining inventory, washing windows, replacing common area light bulbs.
 - ii. Inspections are the other source of programmed maintenance.
 - Inspections are visual and operational examinations of parts of your property to determine their condition.
 - All dwelling units, buildings and properties must be inspected at least annually.
 - a. Inspections should be conducted on a schedule that allows for the work generated by the inspection to be completed in two weeks. (PMR assessment will allow 30 days before operational guidance rating)
 - b. Inspections need to include lease enforcement violations.
 - Public and exterior components should be inspected more frequently as needed.
 - Some examples of inspection generated tasks would include broken windows, dripping faucets, broken or raised tiles, repainting, damaged trees, shrubs, lawns, graffiti on walls, damaged cabinetry, wind damage from storm, rusted pipes in boiler room, broken site furniture or equipment.

Scheduling Programmed Maintenance efficiently:

- Group the work according to location
- Group the work according to particular tasks
- Group the work according to particular employees or contractors
- Group the work according to seasonal or other considerations
- Group the work with similar tasks

- V. Requested Maintenance - Work which is requested by residents or others, does not fall into any category above, and should be accomplished as time and funds are available.
- a. Requests from residents or others for maintenance work which does not fall into one of the other categories should have the lowest priority for staff assignment, but should ideally be attended to within three to seven days.
 - b. Conducting careful inspections at least once a year will catch many potential problems before a resident needs to call. This will reduce the necessity of many resident calls.

Performance Management Review (PMR):

DHCD will use the following Performance Management Review (PMR) criteria to measure the effectiveness of the LHA's maintenance procedures.

During the PMR, the Facilities Management Specialists (FMS) will accompany the Housing Management Specialists (HMS) to complete a thorough review and provide a summary report before they leave.

Samples of inspections and work orders chosen as a part of the PMR evaluation are based on LHA size per the groupings below:

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

Criterion 1: Annual Inspections

1. Annual Inspections – The core of your maintenance delivery system. LHAs must conduct annual inspections in all units to ensure all units are safe, decent, sanitary, and in good repair.
 - Be prepared to provide a random sampling of your last Inspection Reports for the fiscal year under review.
 - DHCD FMS will verify that inspections were completed at least annually for the random sampling of Inspection Reports that are chosen.
 - Small LHA - Pull 7 inspection reports, inspect 3 units;
 - Medium - 10 inspection reports, inspect 4 units;
 - Large & Very Large - 15 inspection reports, inspect 6 units.
 - In addition, DHCD will inspect vacant units (if maintenance ready): Small-1 unit, Medium-2 units, and Large/Very Large-4 units.
 - Be prepared to provide completed work orders for the random sampling of inspections.

Note: Sources of programmed maintenance are inspection work orders and routine maintenance. Programmed maintenance should be grouped and scheduled to make their completion as efficient as possible.

 - DHCD FMS will verify that the LHA can identify, track and provide reports for inspection work orders.
 - DHCD FMS will compare work orders with inspection results to ensure that the deficiencies noted during inspections resulted in work orders.
 - DHCD FMS will check that inspection work orders were completed within 30 calendar days, or placed on a Deferred Maintenance Plan or Capital Improvement Plan (CIP) in the case of qualifying capital repairs.

- Inspection work orders not completed within this timeframe will result in an operational guidance (31 to 45 calendar days) or corrective action (over 45 days) rating.
- LHAs should strive to complete inspection work orders in 2 weeks.
- DHCD FMS will inspect units that are chosen from the inspection reports and corresponding work orders to ensure all units selected are safe, decent, sanitary, and in good repair.
 - Since the particular units that will be inspected will not be known until the day of the inspection, ALL tenants MUST be notified that they may be inspected.
 - DHCD FMS will provide a report of their findings before they leave on the day of the PMR.

Criterion 2: Work Order Systems

2. Emergencies – Emergencies should be narrowly defined as only those conditions which are immediately threatening to the life or safety of your residence, staff, or structures. If a deficiency meets this definition any time of day, it needs to be identified as an emergency.

- Be prepared to provide a list of past and current emergency work orders.
 - DHCD FMS will inspect a sample of Emergency Work Orders (Small LHA – 2; Medium LHA – 4; Large & Very Large LHA – 6) to ensure the items were initiated in 24-48 hours.
 - Emergency work orders not initiated within this timeframe will result in a corrective action rating.

Note: Regular, thorough inspections and a preventive maintenance program that deals with all elements of the LHA property will keep emergencies to a minimum.

3. Vacancy Turnaround – Vacancies should be reoccupied as soon as possible.

- Be prepared to provide DHCD FMS with a list of past and current vacancy work orders.
 - DHCD FMS will inspect a sample of Vacancy Work Orders (Small LHA – 2; Medium LHA – 4; Large & Very Large LHA – 6) to ensure the items were completed within 30 calendar days unless there is an approved waiver for that unit.
 - Vacancy work orders not completed within this timeframe will result in operational guidance (31 to 60 calendar days) or corrective action (over 60 calendar days) rating.

4. Preventive Maintenance (PM) Program - Every LHA has a working preventive maintenance program 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.

- If there is no Preventive Maintenance Program and / or No Preventive Maintenance Work Orders then the LHA will receive a Corrective Action rating.

5. Routine Work Orders – Routine Work includes those tasks that need to be done on a regular basis to keep your physical property in good shape. Some examples of routine maintenance would be: picking up litter, sweeping public spaces, cleaning and sharpening tools, attending training sessions, shoveling snow and plowing, raking leaves, maintaining inventory, washing windows, replacing common area light bulbs.

Note: Sources of programmed maintenance are inspection work orders and routine maintenance. Programmed maintenance should be grouped and scheduled to make their completion as efficient as possible.

- Be prepared to provide DHCD FMS with a list of past and current routine work orders.

6. Requested Work Orders - Work which is requested by residents or others, does not fall into any category above, and should be accomplished within 14 calendar days as time and funds are available.

- Be prepared to provide DHCD FMS with a list of past and current requested work orders.

- DHCD FMS will inspect a sample of Requested Work Orders (Small LHA – 2; Medium LHA – 4; Large & Very Large LHA – 6) to ensure the items were completed within 14 calendar days, or placed on a Deferred Maintenance Plan or Capital Improvement Plan (CIP) in the case of qualifying capital repairs.

- Requested work orders not completed within this timeframe will result in an operational guidance (15 to 30 calendar days) or corrective action (over 30 calendar days) rating.

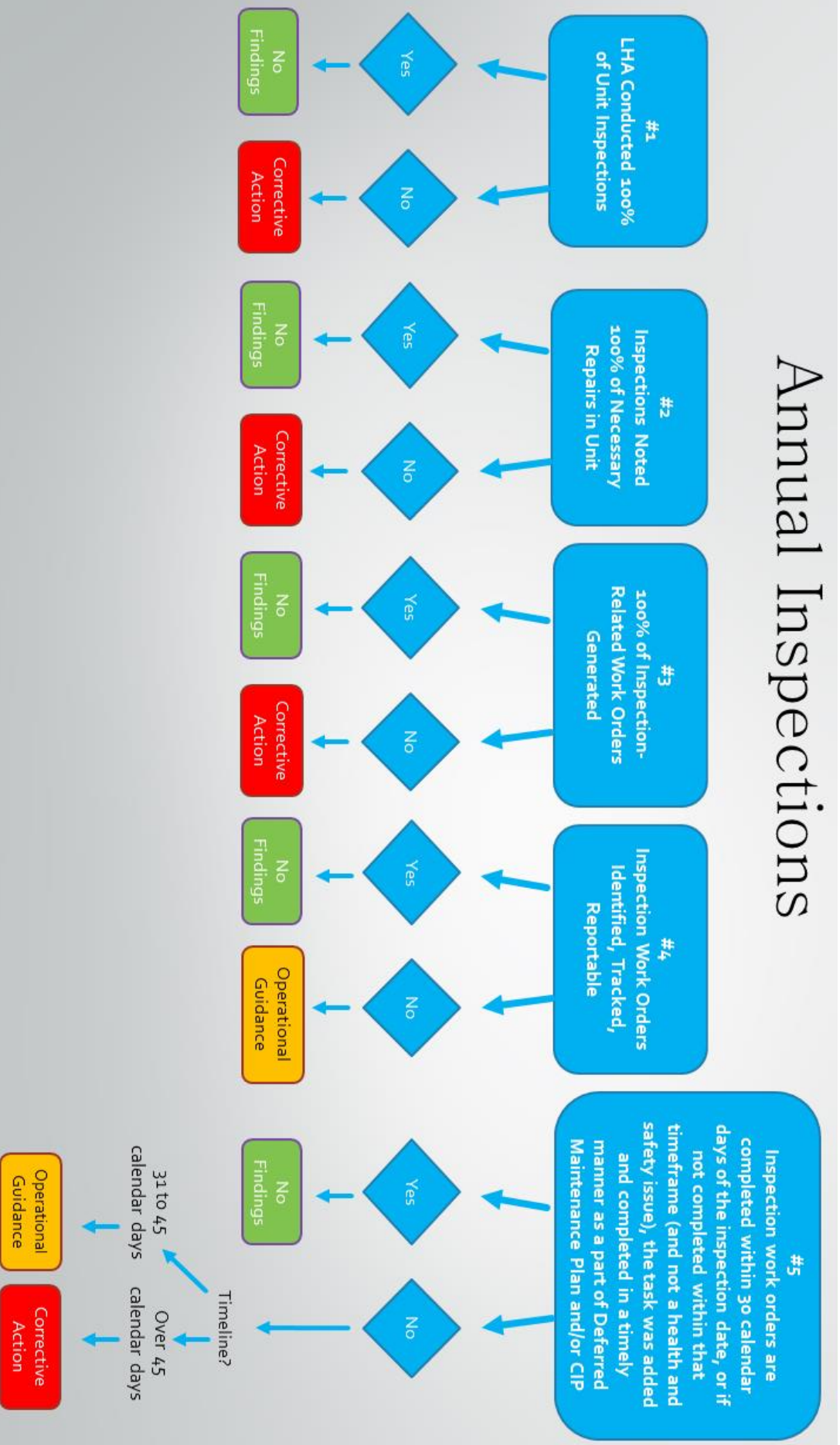
7. Emergency Response System – There exists an after-hours on call system to respond to emergency maintenance requests 24 hours a day and document the results of that response. Residents, staff and call service should have a clear definition of what an emergency is.

- If there is not a 24 hour emergency response system, the LHA will receive a corrective action rating.

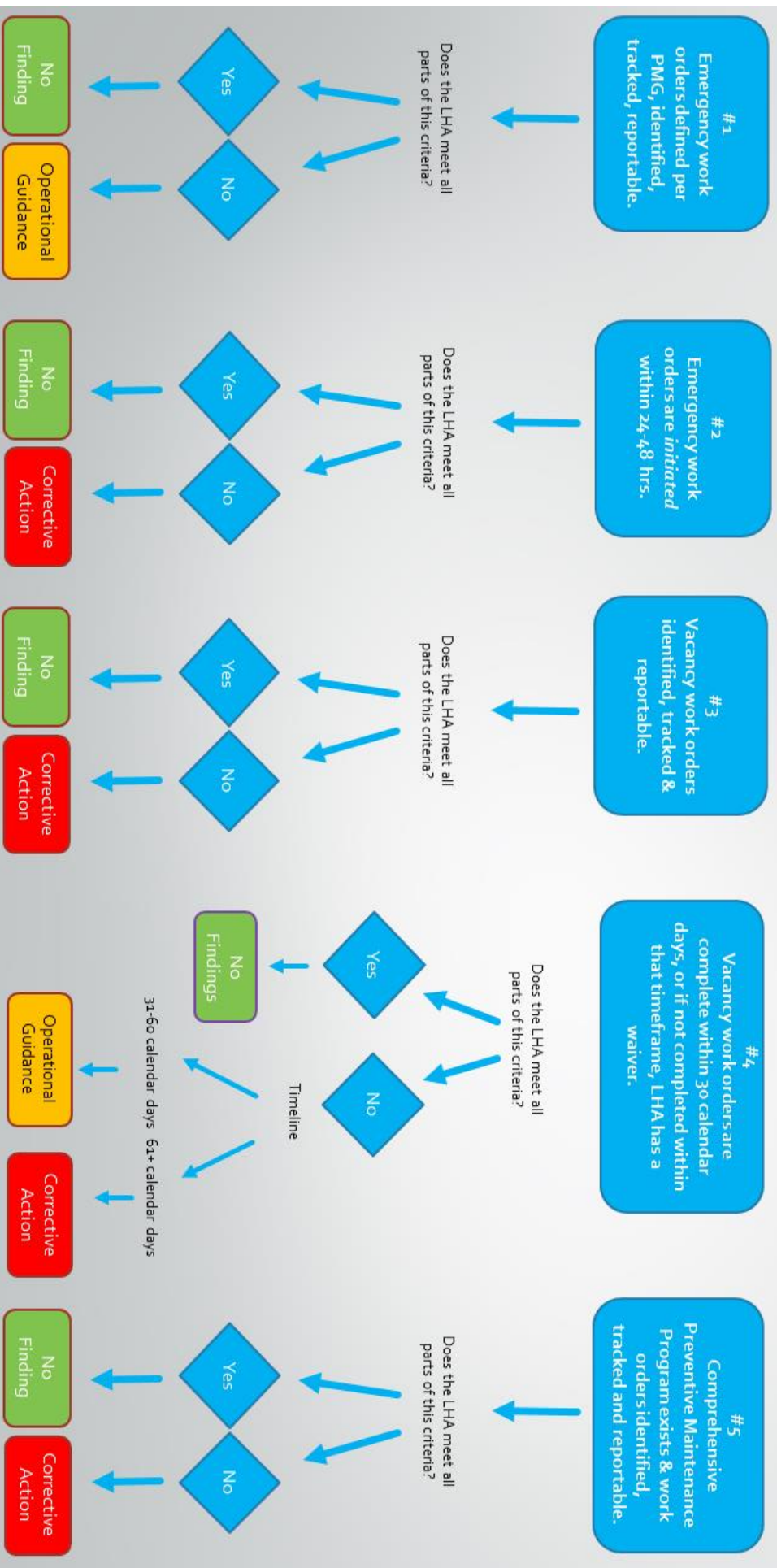
For further questions, please contact your Facilities Management Specialist:

Southeastern MA	Mayungbe Adeniyi, Facilities Management Specialist	617-571-7581
Western MA	Bruce Budrick, Facilities Management Specialist	617-780-5332
South Central MA	Harry Avery, Facilities Management Specialist	508-868-5077
Northeastern MA	Bruce McCarrier, Facilities Management Specialist	617-791-3491

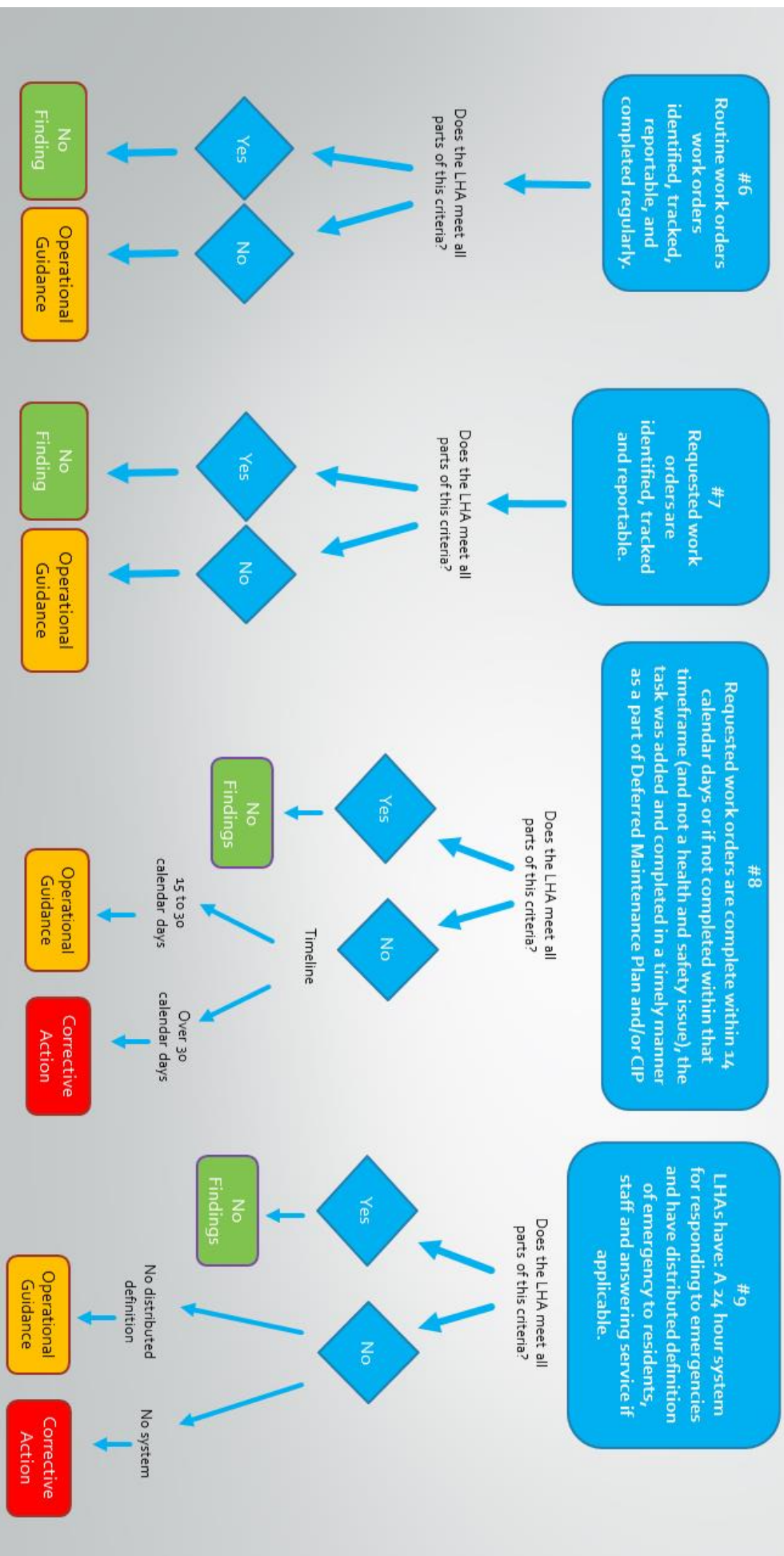
Annual Inspections



Systems



Systems (Continued)



Definition of Deferred Maintenance

By definition, **Deferred Maintenance** is **maintenance**, upgrades, or repairs that are **deferred** to a future budget cycle or postponed for some other reason. Sometimes it is referred to as extraordinary maintenance.

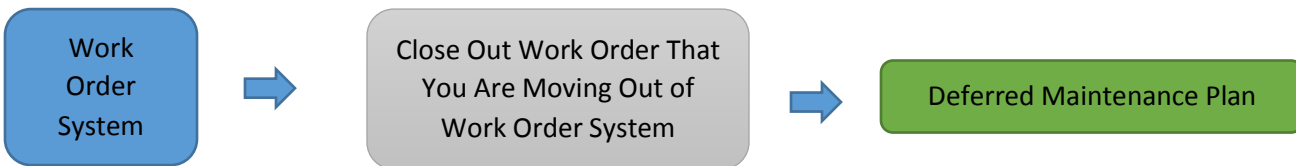
Deferred Maintenance should not be confused with capital projects that would be included in your Capital Improvement Projects (CIP). Large projects that will fall under your “Formula Funding” are still added to your CIP project list.

There are two ways that an item might be added to your Deferred Maintenance Plan.

#1: Originating From Work Order System

As you reconcile your work order system, work orders are closed out as the work is completed.

There are two categories of maintenance tasks that might occur over an extended timeframe. One is any qualifying capital maintenance items that can be grouped together and added to your CIP. The second group of longer-term maintenance tasks can be added to your Deferred Maintenance Plan. The purpose of a Deferred Maintenance Plan is to ensure that an identified deficiency, that cannot be addressed immediately, is not overlooked.



#2: Maintenance Item Added Directly to Deferred Maintenance Plan

Perhaps in the course of walking the property or checking units, you find a maintenance task that needs to be done, such as landscaping or painting but snow prevents immediate attention. If these items are not urgent, but still important and can be done at a later date, these maintenance tasks can be added directly to the Deferred Maintenance Plan.

Situations That Might Warrant Using the Deferred Maintenance Plan

1. **Items Best Completed When Unit is Vacant**

- Example: A unit should have its heating pipes replaced, or heat and smoke detectors hard wired, or electrical service upgraded. Any of these items for one unit would likely be too small a project to be added to CIP but should be done when the unit becomes vacant. They would be added to your Deferred Maintenance Plan and then completed when the unit becomes vacant.

2. **Seasonal Items are items that cannot be completed because of the season.**

- Example: Tree and shrub trimming would not be done while there is snow on the ground. This would be added to your Deferred Maintenance Plan and completed when the weather permits.

3. **Lack of Funding**

- Example: During an inspection, the property manager noticed that the common hallway needs to be repainted. Because of a severe winter, the operating budget does not have sufficient funds to complete all the necessary painting at this time. The Capital Improvement Plan is already maxed out for the next 4 years. The work order is closed out and the item is moved to the “Deferred Maintenance Plan”. It will be completed as the operating budget is built back up and the maintenance staff are able to commit time for the minor project.

4. **Efficiency – Items can be grouped together by location, task or trade**

- Example: A plumber is required to repair 10 leaking diverter valves that were discovered during inspections. It is more efficient to group these work orders together for your plumber.

5. **Organizational and Upkeep Tasks**

- Example: Stockroom needs to be cleaned out and reorganized. Any tasks that occur infrequently enough that they don't fall under the category of routine work orders.

When and How the Deferred Maintenance Plan Should Not Be Used

1. **Life & Safety Items:** If the deficiency is a life and safety hazard, it must not be moved to a Deferred Maintenance Plan. Emergency repairs are top priority and must be repaired before any other maintenance.
2. **Work Order Backlog:** The deferred maintenance list is not to be used as a catch all for work orders that are not completed in a timely manner.
3. **Small/Minor Items:** for example, one cracked tile would not be an item worth adding to the Deferred Maintenance Plan.

What Information to Include in the Deferred Maintenance Plan

Suggested column headings for your Deferred Maintenance Plan spreadsheet include:

- Item
- Date Added to Deferred Maintenance Plan
- Item Description
- Location or Unit Number
- Reason Deferred
- Estimated Costs
- Materials Needed
- Original Work Order Number
- Target Completion Date
- Actual Completion Date
- Other Comments

When You Add An Item to Deferred Maintenance Plan:

Fill in all the fields mentioned in the list above. It is particularly important that an estimation of resources and materials needed to complete the job is done, and that a target completion date for the project is set.

It is also important that the Deferred Maintenance Plan be revisited weekly or biweekly in a meeting that involves the lead maintenance person and the Property Manager or Executive Director.