



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

Deval L. Patrick, Governor ♦ Aaron Gornstein, Undersecretary

June 6, 2014

**Public Housing Notice # 2014-12**

Subject: DHCD 2014 Facility Condition and Accessibility Assessment-State-Aided Public Housing  
To: All Executive Directors of all Local Housing Authorities

Dear Executive Director,

The purpose of this letter is to inform you of the upcoming Facility Condition and Accessibility Assessment that will begin soon.

**Background**

From 2006 through 2010 DHCD conducted two procurements for consultants to conduct Facility Condition Assessments (FCA) on all state-aided public housing properties. The result of these assessments was a uniform, consistent and rich inventory of building and site components including lifecycle information for all facilities at all development at all LHAs entered into the Capital Planning System (CPS). In addition to this, proposed projects were created and entered into CPS based on the lifecycle information collected. Once this project was complete DHCD used this information to fairly and equitably allocate the remaining portion of the 2008 bond bill and formally launch its Formula Funding program.

**DHCD 2014 Facility Condition and Accessibility Assessment Project**

In order for DHCD to continue its successful Formula Funding Program, we must continue to plan for and allocate future bond authorization. To do this we will conduct another Facility Condition Assessment on the state-aided public housing portfolio and have recently procured a consultant, **EMG**, for this project. They have a wealth of experience in all types of real estate assessment projects including Facility Condition, Accessibility and Energy to mention a few and have worked in the past with several of the MA Local Housing Authorities.

By doing this DHCD will once again ensure that all LHAs are assessed uniformly and consistently and that we obtain the necessary data to be able to calculate future LHA Formula Funding Awards based on the lifecycle of the facility inventory components in CPS. This time around, in addition to assessing the lifecycle of the building and site inventory components, we will also be generally assessing the portfolio for accessibility in order to determine where the portfolio may be deficient with regard to meeting accessibility requirements. The accessibility assessment is not a comprehensive accessibility assessment but rather a limited broad assessment designed to identify, locate and quantify the order of magnitude need for accessibility improvements and modernization.

If you would like to know more about the procurement, please take a look at the COMMBUYS (formerly COMM-Pass) website by clicking on the link below:

<https://www.commbuys.com/bs0/external/bidDetail.sdo?docId=S168793-vCurrent&external=true&parentUrl=bid>

Look for and click on the document titled: "[CPS 2014 FCA ADA RFR 1-31-14](#)". This is the main Request for Responses document that will explain what the project scope is on pages 6-10. The other sample attachments shown are referenced in the main RFR document.

The name of the consultant that DHCD has chosen is **EMG**, [www.emgcorp.com](http://www.emgcorp.com). **EMG** is a nationally recognized facilities consulting firm with deep experience with public and affordable housing.

If you have any questions regarding the procurement, please contact Rick Brouillard at [Richard.brouillard@state.ma.us](mailto:Richard.brouillard@state.ma.us).

### **Key Facts**

- This is a Facility Condition and Accessibility Assessment on the state-aided public housing portfolio only for purposes of DHCDs Formula Funding program and accessibility data collection. It does not include Federal Developments or Section 8 New Construction/Substantial Rehab developments.
- Two weeks' notice will be provided to all LHAs prior to any onsite work
- The project will start in July 2014 and continue until completion
- Access will be required at 10% of all dwelling units, common areas and all site areas.

EMG contacts are:

1. **Program Manager**, Marge Mitnick at: [mmitnick@emgcorp.com](mailto:mmitnick@emgcorp.com) for questions concerning project information.
2. **Scheduling Coordinator**: Richard Caldwell at: [rcaldwell@emgcorp.com](mailto:rcaldwell@emgcorp.com) for scheduling questions or concerns.

### **Questions the LHA may have**

1. **What will the assessment consist of?**
  - a. A Facility Condition Assessment of 10% of the dwelling units and common areas at each LHA development to identify proper installation year and expiration year for all CPS inventory components.
  - b. A general Accessibility Assessment of 100% of the identified "Accessible Units" and a general accessibility assessment of 100% of the site elements and applicable interior common areas of each LHA development to classify the units/areas as Accessible, Adaptable or Modified and to identify ease of conversion to fully accessible.
2. **What will be the process?**
  - a. EMG will make Initial contact with LHA to schedule
  - b. EMG & LHA Schedule LHA Kickoff meeting and site visits
  - c. LHA to identify Unit sampling and notify tenants as necessary
  - d. LHA to determine who will escort EMG staff as necessary
  - e. EMG emails the following to LHA prior to kickoff meeting for initial review:
  - f. LHA Kickoff meeting agenda
  - g. LHA specific CPS existing data attachments
  - h. Pre-Assessment questionnaire
  - i. LHA reviews attachments (generally) and completes Pre-Assessment questionnaire
  - j. EMG & LHA Conduct LHA Kickoff meeting
  - k. EMG Conducts assessment work in the field (w/escort as necessary)
  - l. EMG sends LHA Revised data attachments for review, approval and signature. (DHCD requires LHA approval of work product).
  - m. LHA reviews and approves attachments.
  - n. EMG transmits final approved work product to DHCD.

**3. When will my LHA be contacted?**

- a. An exact schedule of when each LHA will be contacted and assessed is not yet developed.
- b. By August of 2014 EMG will have assessment teams deployed in all regions of the state. EMG's scheduler for this project is Richard Caldwell and Richard will coordinate with you mainly based on the efficiency of each assessment teams' geographical location and movement.
- c. If you have questions or concerns or black-out dates that your LHA cannot engage, please contact Richard at [rcaldwell@emgcorp.com](mailto:rcaldwell@emgcorp.com) . Please reference the "**DHCD FCA ADA Assessment Project**" so that Richard can effectively respond.

**4. How long will the process take for my LHA?**

- a. From Kickoff meeting through approval of the work product, this process is estimated to take 1-2 weeks for small LHAs up to 4 weeks for large LHAs. These times frames are contingent upon the LHAs diligence in reviewing and approving the work product.
- b. The entire project has an initial project duration of 12 months to complete all 237 LHAs. The project will start in July, 2014. If additional time is necessary, DHCD and EMG will negotiate this as necessary.

**5. How should the LHA prepare for the assessment?**

- a. Read the RFR document that was posted on COMMBUYS
- b. The LHA should take the time to fill out the Pre-assessment questionnaire once they receive it.
- c. Review the Kickoff meeting agenda and existing CPS data attachments when they are sent to you to generally familiarize yourself with the data.
- d. Compile inspections summaries and maintenance summaries for your developments. (DHCD has already provided EMG with a summary of Capital Improvements)
- e. Prepare a list of any/all current capital and/or maintenance problems/issues. Assemble any photographs you may have to help communicate the respective problems/issues.
- f. Organize any blueprints you may have in case EMG may need to look at them while on site.
- g. Identify 10% of the dwelling units (plus a couple more for contingency) that are generally most representative of the condition of the units as a whole.
- h. Notify the affected tenants at least 48 hours before unit access.
- i. Arrange for an LHA escort for EMG as necessary.

**6. What will be expected of the LHA?**

- a. The LHA will be expected to prepare as outlined above to the best of their ability.
- b. The LHA will be expected to respond to and coordinate with EMG in a timely manner when contacted.
- c. The LHA will be expected to review and approve/sign off on all work product. If there are expected delays then these should be communicated and coordinated with EMG.

**7. Who do I call if I have questions or concerns?**

- a. For general questions or concerns about the background and scope of the project contact Rick Brouillard at DHCD at [Richard.brouillard@state.ma.us](mailto:Richard.brouillard@state.ma.us)
- b. For questions or concerns regarding Project specific information, contact the EMG Program Manager, Marge Mitnick at [mmitnick@emgcorp.com](mailto:mmitnick@emgcorp.com)
- c. For Scheduling questions or concerns, contact Richard Caldwell at [rcaldwell@emgcorp.com](mailto:rcaldwell@emgcorp.com)
- d. If there are any other questions or concerns please contact Rick Brouillard at DHCD at [Richard.brouillard@state.ma.us](mailto:Richard.brouillard@state.ma.us)

**8. What happens after EMG is done with my assessment?**

- a. When EMG has concluded their assessments of your developments the following will occur:
- b. EMG will send the LHA the same attachments with revised data for the LHA to review and approve/sign off on.
- c. Once the LHA approves the work product, EMG will send this information to DHCD.
- d. DHCD will then have the CPS development programmer load it into the CPS database. (The LHA will not have to do any data entry) (DHCD will inform each LHA when this has happened)
- e. DHCD will then begin the process of developing proposed projects based on this revised CPS lifecycle data and entering these into the CPS to establish an ongoing pipeline of preservation and modernization projects. This will be done with LHA input.
- f. Once all assessments are complete and the final LHA has approved its data and DHCD has entered it into the CPS, DHCD will run calculations that will determine each LHAs future Formula Funding award based on current and future deficiency.

DHCD and EMG intend to conduct a pilot test of the process at one LHA in June and deploy two of six assessment teams in July and then fully ramp up to six full time assessment teams from August 2014 until completion. This implementation strategy will allow us to find efficiencies and retool the process. We are excited about this project and continuing our successful Formula Funding program and look forward to working collaboratively with each of you.

Remember, this project is your opportunity to ensure that the data that goes into the CPS is an appropriate representation with regard to the lifecycle of the building and site inventory components. Once all of the data is updated in the system and DHCD runs the Formula Funding calculations for all LHAs based on this lifecycle data, each LHAs calculation result will be final. Your participation in this project is fundamental to ensuring that your LHA receives its proper proportion of future bond funding.

Sincerely,

**Steve Carvalho**

Acting Associate Director, Division of Public Housing and Rental Assistance



**Roberta Strongin**

Director, Project Management Unit, Bureau of Housing Development and Construction



**Rick Brouillard**

Primary Project contact/Developer of Capital Planning Programs/Regional Planner



CC: All DHCD public housing staff, EMG