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

12/31 FYE Large LHAs PMR Facilities Results (n=3)
PMR Data – Medium LHA’s - Sample size = 12

12/31 FYE Medium LHAs PMR Facilities Results (n=12)
PMR Data – Small LHA’s - Sample size = 44

Small LHAs <199 Units PMR Facilities Results (n=44)
PMR Data – FYE 12/31/16 – Sample size = 57

Distribution of Facilities Site Visit Ratings: 12/31 FYE  
n=57 LHAs
• 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
DHCD FMS will look at a random sampling of Inspection Reports and corresponding Work orders.

**PMR Inspection Criteria**

- Conducted 100% of Annual Inspections
- 100% of Inspection-Related Work Orders Generated
- Inspections Noted 100% of Necessary Repairs
PMR Data – Annual Inspections

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

- 100% Inspection Reports: 44
- 100% Inspection WO: 40
- Reports are Accurate: 34
**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

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

- **Vacancy Work Orders**: 27
- **Inspection WO**: 39
- **Emergency WO**: 31
- **Routine WO**: 27
- **Requested WO**: 32

#### Tracking and Reporting

- **Vacancy Work Order Completion**: 25
- **Inspection WO Completion**: 30
- **Emergency WO Completion**: 46
- **Requested WO Completion**: 35

#### Timeliness of Completion
**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)

Preventive Program
- Number of LHAS: 16

Emergency System
- Number of LHAS: 13

Total LHAS:
- Preventive Program: 41
- Emergency System: 44
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)

Preventive Program

Number of LHAS

16

Emergency System

Number of LHAS

44

13
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!