

BOSTON HOUSING AUTHORITY

Performance Management Review (PMR) Report

Fiscal Year End 3/31/2024

*For a detailed report of the Performance Management Review (PMR), please contact the Local Housing Authority

Executive Office of Housing and Livable Communities (EOHLC)

PMR Desk Audit Ratings Summary Official Published PMR Record

For a detailed report of the Performance Management Review (PMR), please contact the Local Housing Authority

Housing Authority	BOSTON HOUSING AUTHORITY
Fiscal Year Ending	Mar 2024
Housing Management Specialist	Melanie Loveland-Hale
Facilities Management Specialist	Wilzor Exantus

Criteria	Score/Rating			
	Management			
	c.667	c.705	c.200	Cumulative
Occupancy Rate	Operational Guidance	No Findings	No Findings	No Findings
	c.667	c.705	c.200	Cumulative
Tenant Accounts Receivable (TAR)	Corrective Action	Corrective Action	Corrective Action	Corrective Action
Board Member Training	Not Applicable			
Certifications and Reporting Submissions	No Findings			
Annual Plan	No Findings			
	Financial			
Adjusted Net Income	Corrective Action			
Operating Reserves	Operational Guidance			

**EXECUTIVE OFFICE OF HOUSING AND LIVABLE COMMUNITIES (EOHLC)
Staff Certification & Training Rating**

LHA Name	BOSTON HOUSING AUTHORITY
FYE	Mar 2024
HMS Name	Melanie Loveland-Hale
FMS Name	Wilzor Exantus

Criteria	Rating
Staff Certification and Training	No Findings

EXECUTIVE OFFICE OF HOUSING AND LIVABLE COMMUNITIES (EOHLC)
CFA Submission

LHA Name	BOSTON HOUSING AUTHORITY
FYE	Mar 2024
HMS Name	Melanie Loveland-Hale
FMS Name	Wilzor Exantus

CFA Submission (Planning Year)

Rating: Not Applicable

Recommendations: 1. No Recommendations

EXECUTIVE OFFICE OF HOUSING AND LIVABLE COMMUNITIES (EOHLC) PMR Desk Audit Recommendations Report

LHA Name	BOSTON HOUSING AUTHORITY
FYE	Mar 2024
HMS Name	Melanie Loveland-Hale
FMS Name	Wilzor Exantus

Occupancy

Rating All: No Findings

Rating 667: Operational Guidance

Rating 705: No Findings

Rating 200: No Findings

1. Use online vacancy system, see user guide if need help. All vacancies must be reported; and quarterly certifications must be completed certifying all data is in system. Request waivers when applicable.
2. Review turnovers with staff weekly or biweekly to monitor status of vacant units.
3. Develop plan for updating units with long term occupancy to limit turn over time at vacancy; family units may need consistent attentions o when lease up, condition is not affecting vacancy turnover time.

Tenant Accounts Receivable (TAR)

Rating All: Corrective Action

Rating 667: Corrective Action

Rating 705: Corrective Action

Rating 200: Corrective Action

1. Adhere to your rent collection policy and lease, i.e. sending notices, reminder letters, 14 day notice to quit, 30 day notice etc. Send notices to tenants early and frequently.
2. Report to credit bureau when resident has vacated unit with past due rent balance.
3. Create written repayment agreements, either in house or court ordered, and ensure they are adhered to.
4. Evaluate vacated balances to better understand what is collectible and what is unlikely to be collected. Don't allow tenant balances to build-up before doing lease enforcement. Review aged receivables report regularly.
5. Set reasonable thresholds for commencing legal action.

Board Member Training

Rating: Not Applicable

1. No Recommendations

Certifications and Reporting Submissions

Rating: No Findings

1. No Recommendations

Annual Plan Submission

Rating: No Findings

1. No Recommendations

Adjusted Net Income/Revenue

Rating: Corrective Action

Revenue

1. No Recommendations

Expense

Salaries

1. Monitor expenses throughout the year; over or underspending in certain budget lines, can be fixed by reducing or increasing other lines to ensure you stay within your ANUEL.

Legal

1. No Recommendations

Utilities

1. No Recommendations

Maintenance

1. No Recommendations

Other

1. The Authority should work with HMS and EOHLC Finance staff to review the ANI metric and identify criteria to monitor spending throughout the fiscal year.

Operating Reserve

Rating: Operational Guidance

1. Please refer to 2019-01 Revisions to PMR Criteria for 1st Publishing Year and 2018-04 PHN 2018-04 Operating Reserve Augmentation and New Spending Thresholds and current budget guidelines.
2. An LHA may spend down to 35% of maximum reserve level without consulting EOHLC, but the LHA must budget these expenses in the correct line items of their annual operating budget. If the expense occurred after EOHLC approval of the annual operating budget, the LHA should submit a budget revision with these expenditures.
3. Any expenditures from the operating reserve that will result in a projected operating reserve of less than 35% of maximum reserve level, requires prior written approval from EOHLC, unless the expenses are to resolve health and safety issues.

EXECUTIVE OFFICE OF HOUSING AND LIVABLE COMMUNITIES (EOHLC)
CHAMP Close Out Report

LHA Name	BOSTON HOUSING AUTHORITY
FYE	Mar 2024
HMS Name	Melanie Loveland-Hale
FMS Name	Wilzor Exantus

CHAMP Criteria 1a

Rating: No Findings

Recommendations: 1. No Recommendations

CHAMP Criteria 1b

Rating: Corrective Action

Recommendations: 1. Prioritize the intake of CHAMP Paper Applications to ensure that all CHAMP Paper Applications are date and timestamped.
2. Prioritize the data entry of CHAMP Paper Applications to ensure that all CHAMP Paper Applications are entered into CHAMP accurately.
3. Ensure that the applicant ID number recorded in the HAFIS Vacancy system reflects the CHAMP applicant ID number.

CHAMP Criteria 1c

Rating: Operational Guidance

Recommendations: 1. Prioritize CHAMP Paper Application data entry to ensure that your LHA reduces the number of CHAMP Paper Applications entered more than 30 days from receipt. No more than 2% of CHAMP Paper Applications can be entered more than 30 days after date/timestamp.

CHAMP Criteria 2a

Rating: Corrective Action

Recommendations: 1. Ensure that all vacancies are recorded in the EOHLC Housing Apps Vacancy Reporting System within 30 days of the vacancy date.
2. Ensure that you are entering vacancy data correctly within 30 days.
3. Establish reoccurring calendars reminders to help ensure vacancy data is entered into the EOHLC Housing Apps Vacancy Reporting System within 30 days.

CHAMP Criteria 2b

Rating: Corrective Action

Recommendations: 1. Ensure that all offers of housing were made using CHAMP for all units occupied in the Fiscal

Year (Excluding Admin Transfers).

2. Ensure that all unit offer data is correctly entered into the EOHLC Housing Apps Vacancy Reporting System (Including Application ID, List Pull ID, Applicant Priority/Preference, and Lease Start date)

3. Ensure that the CHAMP ID number is entered correctly into HAFIS Vacancy system.

CHAMP Criteria 3a

Rating: No Findings

Recommendations: 1. Other

CHAMP Criteria 3b (Planning Year)

Rating: Not Applicable

Recommendations: 1. No Recommendations

CHAMP Criteria 3c (Planning Year)

Rating: Not Applicable

Recommendations: 1. No Recommendations

**EXECUTIVE OFFICE OF HOUSING AND LIVABLE COMMUNITIES (EOHLC)
PMR Physical Condition Report**

For any questions on your FMS PMR Ratings, please contact your FMS.

LHA Name	BOSTON HOUSING AUTHORITY
FYE	Mar 2024
HMS Name	Melanie Loveland-Hale
FMS Name	Wilzor Exantus

Criteria 1: 100% of units inspected during FYE under review

Rating: Corrective Action

- Recommendations:
1. Ensure that Units are Inspected per EOHLC guidance
 2. Ensure Inspection Reports are created for each Unit Inspection
 3. Ensure that all deficiencies found at the time of unit inspection are included in Inspection Reports including tenant violations
 4. Ensure that work orders are created, tracked, and completed for all deficiencies identified during unit inspection
 5. Train staff on work order types and how to input them into your work order system/If you use web-based software, reach out to your vendor for training/training materials/changes to the software See Handout K + Software Handouts (M, N, or O) If Applicable
 6. BHA should be conducting annual inspections of all units producing W/O's labeled as Inspection and having work completed within 30 days.
BHA should consider spreading out inspections far enough apart to be able to complete all work orders within 30 days. If an inspection work order cannot be completed within 30 days because of back-ordered parts or some other valid reason, then that work order should be moved to your deferred list.

Criteria 2: Unit inspection Reports create, track, and report Work Orders for inspection repairs, and Work Orders are completed within 30 days or added to DM/CIP

Rating: Corrective Action

- Recommendations:
1. Ensure that Units are Inspected per EOHLC guidance
 2. Ensure Inspection Reports are created for each Unit Inspection
 3. Ensure that all deficiencies found at the time of unit inspection are included in Inspection Reports including tenant violations
 4. Ensure that work orders are created, tracked, and completed for all deficiencies identified during unit inspection
 5. Train staff on work order types and how to input them into your work order system/If you use web-based software, reach out to your vendor for training/training materials/changes to the software See Handout K + Software Handouts (M, N, or O) If Applicable
 6. BHA should be conducting annual inspections of all units producing W/O's labeled as Inspection and having work completed within 30 days.
BHA should consider spreading out inspections far enough apart to be able to complete all work orders within 30 days. If an inspection work order cannot be completed within 30 days because of back-ordered parts or some other valid reason, then that work order should be moved to your deferred list.

Criteria 3: Unit Inspection Reports accurately reflect necessary repairs

Rating: Corrective Action

- Recommendations:
1. Ensure that all Notices of Lease Violation are issued for all tenant related deficiencies identified during unit inspection
 2. Ensure that all Lease Violations are resolved per EOHLC guidance

Criteria 4: Work Orders created for every vacancy and completed within 30 days (or waiver requested)

Rating: Corrective Action

- Recommendations:
1. Ensure that all work required for a Vacancy Turn Over is recorded in a Vacancy Turn Over Work Order
 2. Ensure that all Vacancy Turn Over Work Orders are created and tracked per EOHLC guidance
 3. Refer to Property Maintenance Guide - Chapters 1 to 3 on Work Order Systems See Handout B
 4. LHA should establish a system of move out inspections for all vacant units. Produce work orders from those move out inspection reports, and list on work order time spent working on turnover, date turnover was started and date finished, list of work done, and material used.
 5. BHA should establish a system of move-out inspections for all units that become vacant. Producing W/O from the move-out inspection report, and list on W/O time spent working on turnover, date turnover was started, and date finished, list of work done, and material used. Turnovers should be completed within 30 days or less. If cannot complete work within 30 days, BHA should contact the Housing Management Specialist to see if eligible for a waiver.

Criteria 5: Vacancy Turnover Work Orders accurately reflect necessary repairs

Rating: Corrective Action

- Recommendations:
1. Ensure that all work required for a Vacancy Turn Over is recorded in a Vacancy Turn Over Work Order

Criteria 6: LHA Preventive Maintenance Plan accurately reflects all necessary work to maximize life of LHA components

Rating: No Findings

- Recommendations:
1. No Recommendations

Criteria 7: All emergency work orders are created, tracked, reported and completed within 48 hours

Rating: No Findings

- Recommendations:
1. Ensure that all Emergency Work Orders are created, tracked, and reported per EOHLC guidance
 2. Ensure that all Emergency Work Orders are completed within 48 hours

3. Refer to Property Maintenance Guide (Pages I-5 to I-10) on Emergencies and System Setup
See Handout B

Criteria 8: All requested work orders are created, tracked, reported and completed within 14 days or added to DM/CIP

Rating: No Findings

Recommendations:

1. Ensure that all Tenant Requested Work Orders are created, tracked, and reported per EOHLC guidance
2. Ensure that all Tenant Requested Work Orders are completed within 14 days or are added to the DM/CIP
3. Refer to Property Maintenance Guide - Chapters 1 to 3 on Work Order Systems See Handout B
4. Consider software (web-based applications) or Excel/Access to help you generate/track/close out work orders See Handout H

Health & Safety Deficiencies

Inspection reports were provided to the LHA at the time of the EOHLC site visit. There were no Health and Safety deficiencies identified during the PMR Inspection.