

Ashtabula Metropolitan Housing Authority

Strategic Plan

2026–2030

Executive Summary

The Ashtabula Metropolitan Housing Authority (AMHA) exists to provide safe, clean, and affordable housing for individuals and families in Ashtabula County. This Strategic Plan establishes a five-year roadmap that strengthens housing quality, expands resident opportunity, increases safety, builds organizational capacity, and positions AMHA for long-term sustainability.

The plan is grounded in AMHA’s mission and vision; informed by staff, resident needs, operational assessments, and current community dynamics; and aligned with HUD expectations and industry best practices. This document reflects AMHA’s commitment to excellence, integrity, and service to the community.

Mission, Vision, and Values

Mission

To provide Ashtabula County residents with clean and safe affordable homes. We strive to build strong relationships with residents and community stakeholders and serve families with honesty, dignity, and respect.

Vision

AMHA envisions a community where individuals and families in Ashtabula County have access to high-quality affordable homes that promote stability and opportunity for all.

Values

Responsiveness

Empathy

Integrity

Flexibility

Services

Affordable housing

Case management

Community advocacy

Community partnerships

Education

Safety and security

Organizational Overview

AMHA provides housing and supportive services across Ashtabula County, operating high-rise buildings, family sites, maintenance facilities, and administrative offices. The agency works closely with local government, nonprofit partners, and community stakeholders. Core operations include property management, maintenance, resident services, Housing Choice Voucher administration, and public engagement.

Environmental Scan (SWOT Analysis)

Strengths

- Ability to provide essential affordable housing
- Ethnic and socioeconomic diversity among staff and residents
- Experienced staff with deep institutional knowledge
- Full in-house maintenance team
- Clean audits and strong financial reserves
- Positive relationships with city and county officials
- Highly engaged Board of Housing Commissioners

Weaknesses

- Aging properties with significant capital needs
- Limited affordable housing supply across the county
- Ongoing security concerns, especially in high-rises
- Inconsistent tenant screening processes
- Gaps in organizational structure and span of control
- Staff resistance to change

Opportunities

- Leadership professional development and mentoring
- Comprehensive policy and procedure updates
- Enhancing property security and safety
- Strengthening staff alignment with mission and vision
- Improving tenant screening consistency
- Increasing responsiveness to resident concerns
- Developing a phased renovation or replacement plan

Threats

- Competing local housing developments
 - Potential reductions in HUD funding
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Strategic Priorities 2026–2030

Priority 1: Improve Housing Quality and Capital Infrastructure

Goal 1.1 — Develop a long-term Capital Improvement & Renovation Plan

Objectives

- Conduct full property assessments by 2026
- Create 5–10 year property renovation and replacement schedules
- Align capital plans with HUD funding opportunities and local partnerships

Key Actions

- Use Preventive Maintenance Plan and inspection data to identify critical needs
- Update physical needs assessments (PNAs)
- Pursue modernization funding, grants, and partnerships
- Implement a structured annual maintenance calendar

Key Performance Indicators (KPIs)

- Reduction in emergency repairs by 20%
- REAC/NSPIRE inspection scores improve year over year
- Completion of annual capital projects on schedule and within budget

Priority 2: Strengthen Resident Experience and Community Engagement

Goal 2.1 — Implement the Resident Relations Plan across all properties

Objectives

- Standardize communication processes and response times
- Increase resident participation in events and councils
- Improve transparency and trust between property managers and residents

Key Actions

- Monthly newsletters and communication updates
- Annual resident satisfaction surveys
- Quarterly community events
- Property Manager open office hours

KPIs

- 10% annual increase in resident satisfaction scores
- 25% increase in resident event participation
- Reduced grievances and complaints

Priority 3: Enhance Safety and Security Across All AMHA Properties

Goal 3.1 — Fully deploy the Comprehensive Security Plan

Objectives

- Establish consistent unarmed security coverage
- Improve incident reporting and response protocols
- Strengthen relationships with Ashtabula Police, Fire, and EMS

Key Actions

- 24/7 staffing at high-rise buildings
- Patrols at family sites during high-activity hours
- Monthly security audits and trend reviews
- Visitor check-in systems and improved access control

KPIs

- 20% reduction in security incidents within 2 years
- Increased resident perception of safety on surveys
- Full compliance with security reporting standards

Priority 4: Invest in Staff Training, Leadership Development, and Organizational Capacity

Goal 4.1 — Implement a structured agency-wide Training & Development Program

Objectives

- Ensure all staff meet HUD, Fair Housing, and safety training requirements
- Build leadership capacity and succession planning
- Strengthen internal communication, teamwork, and accountability

Key Actions

- Annual training calendar with required certifications
- Leadership mentoring for the Executive Director and managerial staff
- Performance evaluations tied to training completion
- Role-specific technical training for maintenance, HCV, finance, and property management

KPIs

- 100% compliance with annual training requirements
- Increased staff retention
- Improved internal communication survey scores

Priority 5: Improve Operational Excellence and Policy Compliance

Goal 5.1 — Update all AMHA policies, procedures, and operational workflows

Objectives

- Review and revise ACC, ACOP, tenant screening, procurement, and administrative processes
- Strengthen data reporting and documentation
- Increase transparency and internal accountability

Key Actions

- Conduct agency-wide policy review by 2026
- Standardize tenant screening across all properties
- Integrate CMMS and Yardi process flows into workflow procedures
- Establish quality assurance checks for file reviews

KPIs

- Completion of full policy update cycle
- Reduction in audit findings and compliance corrections
- Improved consistency in tenant screening

Priority 6: Strengthen Community Partnerships and Resource Connections

Goal 6.1 — Expand collaboration with local agencies, nonprofits, and service providers

Objectives

- Increase supportive services available to residents
- Build opportunities for youth, seniors, and families
- Strengthen AMHA's reputation as a community leader

Key Actions

- Formalize partnerships with schools, United Way, Job & Family Services
- Provide on-site resource fairs and education programs
- Establish a referral network for crisis assistance

KPIs

- Increase in residents connected to supportive services
- Positive feedback from partner organizations
- Measurable improvements in resident stability outcomes

Implementation Timeline (2026–2030)

Year	Focus Areas
2026	Launch training program; conduct property assessments; implement resident communication standards; strengthen security protocols
2026-2027	Complete policy updates; finalize capital plan; expand partnerships; initiate priority renovations
2027-2028	Continue renovations; expand resident engagement programs; deploy technology upgrades
2028-2029	Assess progress; adjust priorities; scale preventive maintenance and predictive systems
2029-2030	Full evaluation of strategic plan outcomes; publish accomplishments and next-cycle plan

Evaluation and Accountability

AMHA leadership will:

- Conduct **quarterly performance reviews** of each strategic priority
- Track KPIs through data dashboards, reports, and staff feedback
- Provide annual updates to the Board of Commissioners
- Adjust implementation steps based on needs, funding, and community conditions

A formal **Strategic Plan Review Report** will be completed each year.

Appendices

(These can be attached as standalone documents in the final formatted plan.)

- Comprehensive Security Plan
- Resident Relations Plan
- Employee Training and Development Outline
- Preventive Maintenance Plan
- Organizational Chart (if provided)
- Capital Needs / Property Assessments (once available)

Comprehensive Security Plan

ASHTABULA METROPOLITAN HOUSING AUTHORITY

(For Unarmed Security Operations – Gulfview Towers, Lakeview Towers, and All Other AMHA Sites)

1. Purpose and Objectives

The goal of this plan is to:

- Deter criminal activity and nuisance behavior.
 - Ensure resident, staff, and visitor safety.
 - Protect AMHA property and assets.
 - Build community trust through professional, respectful security presence.
 - Provide consistent procedures across all AMHA-managed properties.
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2. Scope of Security Coverage

Property	Type	Primary Security Hours	Security Focus
Gulfview Towers	High-rise residential	24/7 coverage	Access control, visitor monitoring, incident response, resident safety
Lakeview Towers	High-rise residential	24/7 coverage	Access control, lobby patrols, emergency response
Family Sites (e.g., West 58th, 52nd, etc.)	Family housing	Evenings & weekends	Patrols, trespassing prevention, noise/disturbance control
Administrative Offices	Offices	Business hours (with after-hours alarm monitoring)	Access control, visitor verification
Maintenance/Storage Facilities	Non-residential	After-hours patrols	Theft prevention, perimeter checks

3. Security Staffing and Deployment

- **Supervisor:** 1 full-time Security Supervisor (liaison with AMHA management and local law enforcement).
 - **Unarmed Security Officers:** Assigned per shift by location.
 - **Typical Shift Coverage:**
 - **Day Shift (8 AM – 4:30 PM):** Focus on resident interaction, visitor management, and parking enforcement.
 - **Evening Shift (8 PM – 6 AM M-F):** Focus on deterrence, noise complaints, and resident support.
 - **Weekends (9 PM – 5 AM):** Patrols, lock checks, and surveillance monitoring.
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4. Duties and Responsibilities

General Duties for All Unarmed Security Guards

- Conduct foot patrols of lobbies, hallways, stairwells, and grounds.
 - Maintain a **daily activity log** (electronic or paper).
 - Enforce AMHA property rules (e.g., loitering, visitor hours, noise).
 - Check doors, locks, and lighting during patrols.
 - Respond to resident complaints or requests for assistance.
 - Monitor CCTV and access control systems (if available).
 - Report maintenance and safety hazards.
 - Liaise with the Ashtabula Police Department during incidents.
 - Never use physical force—use **verbal de-escalation** and request law enforcement when necessary.
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5. Site-Specific Procedures

Gulfview Towers

- Maintain presence in the lobby at all times.
- All visitors sign in and out (photo ID required).
- Monitor security cameras covering elevators, entrances, and parking areas.
- Conduct hourly stairwell and floor checks.
- Check that fire exits are clear.
- Enforce no-smoking and loitering policies.
- Provide escorts for residents upon request.

Lakeview Towers

- Similar to Gulfview Towers, but with emphasis on parking lot surveillance due to increased vehicle incidents.
- Verify contractor and delivery personnel credentials.
- Monitor community rooms during events.
- Assist with elevator or maintenance emergencies (contact proper staff).

Family Housing Sites

- Conduct vehicle and foot patrols (mix of visible presence and random patterns).
- Check playgrounds, dumpsters, and parking areas for unauthorized activity.
- Report vandalism or graffiti immediately.
- Coordinate with resident services to identify high-activity areas.

Administrative Offices & Maintenance Facilities

- Secure perimeters after hours.
- Check alarm systems and locks.
- Verify after-hours maintenance access with management.

6. Communication Protocols

- All guards equipped with two-way radios or cell phones.
- Immediate notification to:
 - **AMHA Security Supervisor** for incidents or suspicious activity.
 - **Ashtabula Police/Fire/EMS** for emergencies.
- Written **Incident Reports** submitted by end of each shift for:
 - Criminal or suspicious activity
 - Accidents or injuries
 - Maintenance or safety hazards
 - Resident complaints

7. Training Requirements

Unarmed guards must complete:

- Ohio Security Guard (Private Security) certification
- AMHA-specific orientation (property layout, policies, emergency contacts)
- **Annual training** in:
 - Conflict resolution & de-escalation
 - Cultural competency and resident relations
 - Fire safety and evacuation
 - Report writing and documentation
 - Emergency response procedures

8. Emergency Procedures

Security personnel must know:

- Locations of fire alarms, extinguishers, and AEDs.
- Evacuation routes for Gulfview and Lakeview Towers.
- Shelter-in-place and severe weather plans.
- Procedures for medical emergencies (call 911, provide first aid if trained).
- Coordination with Ashtabula Police and Fire for response management.

9. Technology and Equipment

- CCTV systems (with 30-day video retention).
- Electronic key access (where applicable).
- Radios and flashlights for all guards.
- Visitor logbooks or digital check-in systems.
- Panic alarms or duress buttons in lobbies and offices.

10. Performance and Compliance

- Security Supervisor conducts **monthly audits** of logs and reports.
- AMHA reviews incident trends quarterly to adjust coverage or procedures.
- Guards are subject to random site inspections.
- Regular coordination meetings between AMHA management, police, and the security vendor.

11. Community Engagement

- Encourage resident feedback on safety.
- Host quarterly “Safety and Security” meetings with residents.
- Work with resident councils to promote awareness and cooperation.
- Provide escort service for elderly or disabled residents when needed.

12. Reporting and Documentation

Every guard must complete:

- **Daily Activity Report (DAR)**
- **Incident Report (IR)** for any unusual event
- **Maintenance Request Form** (if needed)

Ashtabula Metropolitan Housing Authority (AMHA) Resident Relations Plan

Purpose

The purpose of this Resident Relations Plan is to establish consistent standards and best practices for AMHA Property Managers to foster positive relationships with residents, maintain safe and welcoming communities, and ensure compliance with all HUD and AMHA policies.

Goals

1. **Enhance Communication:** Ensure residents are well-informed and feel heard through clear, respectful, and proactive communication.
2. **Promote Resident Engagement:** Encourage resident participation in community activities, resident councils, and feedback opportunities.
3. **Strengthen Community Stability:** Reduce turnover, foster resident pride, and enhance property conditions.
4. **Ensure Equity and Fairness:** Deliver services consistently and without bias in accordance with Fair Housing laws and AMHA policies.
5. **Support Self-Sufficiency:** Connect residents with supportive services and community resources that promote stability and independence.

Key Strategies and Actions

1. Communication and Transparency

- **Resident Orientation:** Conduct welcome meetings for all new residents explaining lease terms, maintenance procedures, community standards, and available resources.
- **Regular Communication Channels:**
 - Monthly newsletters or digital updates with community announcements, policy reminders, and events.
 - Property-specific bulletin boards in common areas.
 - Social media updates (if approved by AMHA).
- **Open Office Hours:** Each Property Manager will host at least one open office session monthly for resident questions or concerns.
- **Response Standards:**
 - Acknowledge resident inquiries within 24 hours (business days).
 - Resolve or update residents on open issues within 5 business days whenever possible.

2. Resident Engagement and Community Building

- **Resident Councils:** Support active resident councils by attending meetings, encouraging participation, and sharing AMHA updates.
- **Community Events:** Coordinate quarterly resident events such as safety fairs, seasonal clean-ups, or resource days with local partners.
- **Resident Surveys:** Conduct semiannual satisfaction surveys to assess needs, communication effectiveness, and overall satisfaction.
- **Recognition Programs:** Implement “Good Neighbor” or “Community Pride” programs to highlight residents contributing positively to the community.

3. Conflict Resolution and Issue Management

- **Early Intervention:** Encourage Property Managers to address resident concerns before escalation through proactive communication.
- **Standardized Process:**
 - Document all resident complaints in Yardi (or AMHA’s property management system).
 - Follow AMHA grievance procedures and HUD regulations.
 - Provide written summaries of outcomes to involved parties.
- **Training:** Property Managers will complete annual training in conflict resolution, fair housing compliance, and trauma-informed communication.

4. Maintenance and Quality of Life

- **Responsive Maintenance:**
 - Provide clear maintenance request procedures to residents.
 - Ensure emergency repairs are completed within 24 hours.
 - Track completion rates and resident satisfaction with maintenance services.
- **Community Cleanliness:**
 - Conduct weekly property inspections and quarterly resident-led clean-up events.
 - Promote shared responsibility for maintaining grounds and common areas.

5. Resident Support and Partnerships

- **Resource Connection:** Partner with local agencies (e.g., Ashtabula County Community Action, Job and Family Services, United Way) to provide services such as job training, financial literacy, and health programs.
- **Crisis Assistance:** Maintain an up-to-date list of local resources for residents facing hardship.
- **Youth and Family Engagement:** Collaborate with schools and youth organizations to create positive outlets and development opportunities for young residents.

6. Measurement and Evaluation

- **Quarterly Metrics:**
 - Resident satisfaction scores
 - Number of resident events and attendance rates
 - Maintenance response time averages
 - Number of complaints resolved within policy standards
- **Annual Review:** Each year, AMHA leadership and property managers will review resident relations data to identify trends, recognize success, and implement improvements.

Roles and Responsibilities

Role	Responsibilities
Property Managers	Implement resident relations strategies, manage communication, document resident interactions, and report outcomes.
Resident Services Coordinator (if applicable)	Provide supportive resources, coordinate referrals, and assist with community programming.
Maintenance Team	Respond promptly to requests, communicate repair timelines, and support community appearance initiatives.
AMHA Leadership	Provide training, policy guidance, and oversight to ensure consistency and quality across properties.

Training and Continuous Improvement

- Property Managers will receive **annual training** in:
 - Customer service and communication
 - HUD and Fair Housing requirements
 - De-escalation and mediation techniques
 - Resident engagement best practices
 - Feedback from residents and staff will inform updates to this plan each year.
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AMHA Resident Relations Plan

Implementation Timeline

Phase 1: Preparation & Rollout (Month 0–2)

Goal: Finalize plan, prepare staff, establish communication systems.

Weeks 1–4

- Finalize Resident Relations Plan and distribute to Property Managers.
- AMHA Leadership holds kickoff meeting outlining goals, expectations, and reporting structure.
- Develop or update:
 - Resident orientation packet
 - Newsletter/digital update template
 - Bulletin board standards
 - Resident complaint documentation templates in Yardi
- Confirm quarterly survey format and schedule.
- Create annual training calendar (fair housing, conflict resolution, trauma-informed communication).

Weeks 5–8

- Property Managers set first **open office hours** schedule.
- Install or refresh property bulletin boards.
- Establish 24-hour acknowledgment and 5-day resolution tracking process.
- Train staff on new communication and documentation procedures.
- Establish partnerships with local agencies (United Way, Community Action, Job & Family Services).

Phase 2: Communication Standards Launch (Month 2–4)

Goal: Ensure consistent, proactive communication with residents.

Month 2

- Begin issuing **monthly newsletters/digital updates**.
- Hold first **resident orientation sessions** for new move-ins using updated materials.
- Launch first scheduled **open office hours**.
- Develop process to monitor response and resolution time metrics.

Month 3–4

- Introduce standardized resident signage and community boards.
- Begin social media updates (if approved).
- Implement Acknowledgment/Resolution tracking in Yardi.

Phase 3: Engagement & Community Building (Month 3–9)

Goal: Increase resident involvement and strengthen community stability.

Month 3

- Support activation or reactivation of **Resident Councils**.
- Schedule first quarterly **community event** (e.g., safety fair or clean-up).

Month 4–6

- Launch **Good Neighbor / Community Pride Recognition Program**.
- Begin coordination with schools/youth organizations for youth engagement activities.

Month 6

- Conduct the first **semiannual resident satisfaction survey**.
- Review survey results and adjust communication and engagement strategies.

Month 6–9

- Continue quarterly events and ongoing partnership programming.
- Track attendance and engagement rates to evaluate resident participation.

Phase 4: Maintenance & Quality-of-Life Enhancements (Month 1–12)

Goal: Improve responsiveness, safety, and overall community condition.

Month 1

- Roll out new resident maintenance request instructions.
- Ensure maintenance team understands the 24-hour emergency repair requirement.

Ongoing (Weekly–Quarterly)

- **Weekly:** Property inspections.
- **Monthly:** Track maintenance completion rates and resident feedback.
- **Quarterly:** Resident-led clean-up events with PM support.

Quarterly Reviews

- Analyze data for response times, backlog, and high-frequency issues.
- Adjust staffing, scheduling, or contractor use as needed.

Phase 5: Conflict Resolution, Documentation & Compliance (Month 1–12)

Goal: Standardize issue management, reduce escalation, and ensure HUD compliance.

Month 1–3

- Staff complete required training in:
 - Conflict resolution
 - Fair Housing
 - Trauma-informed communication
- Begin full implementation of standardized documentation process in Yardi.

Ongoing

- Property Managers provide written summaries of outcomes for all grievances.
- Quarterly quality audits of grievance documentation.
- Leadership provides coaching when patterns of conflict or escalation appear.

Phase 6: Evaluation & Continuous Improvement (Quarterly + Annually)

Goal: Use data to strengthen program effectiveness and support decision-making.

Every Quarter

- Review key metrics:
 - Resident satisfaction survey results
 - Number of events and participation
 - Maintenance response times
 - Complaints resolved within policy timelines
- Leadership and PMs meet to review trends and challenges.

Annually

- Conduct full evaluation of Resident Relations Plan.
- Update policies and communication tools based on:
 - Resident feedback
 - Staff insights
 - Performance metrics
- Present progress to Board of Commissioners.

Summary Timeline Table

Phase	Timeframe	Key Activities
Phase 1: Preparation	Month 0–2	Finalize plan, train staff, prepare tools/materials
Phase 2: Communication Launch	Month 2–4	Newsletters, open office hours, response time tracking
Phase 3: Engagement	Month 3–9	Resident councils, events, surveys, recognition programs
Phase 4: Maintenance Improvements	Month 1–12	Weekly inspections, quarterly clean-ups, response tracking
Phase 5: Conflict Resolution	Month 1–12	Documentation standards, de-escalation processes
Phase 6: Evaluation	Quarterly + Annually	Metrics review, annual report, plan update

Conclusion

This Resident Relations Plan aims to build trust, accountability, and collaboration between AMHA staff and residents. By fostering open communication, engagement, and respect, AMHA can ensure its communities remain safe, supportive, and vibrant places to live.

Employee Training and Development Outline

Ashtabula Metropolitan Housing Authority (AMHA)

Purpose

To ensure all AMHA employees maintain the knowledge, skills, and professionalism required to support the mission of providing safe, affordable housing and promoting community self-sufficiency.

1. New Employee Orientation

Timeframe: Within the first 30 days of hire

Objective: Introduce new employees to AMHA's mission, values, operations, and compliance standards.

Topics Covered:

- Overview of AMHA programs and services
- Organizational structure and department functions
- Employee policies and procedures
- Ethics, confidentiality, and conflict of interest
- Fair Housing and Equal Opportunity principles
- Safety and emergency procedure

2. Core Compliance Training

Timeframe: Within 60 days of hire; refreshed annually

Required Areas:

- **Fair Housing Act (FHA) and HUD Non-Discrimination Requirements**
- **Section 504 and ADA Compliance**
- **Violence Against Women Act (VAWA)**
- **HUD Program Regulations** (Public Housing, HCV/Section 8, etc.)
- **Privacy Act and Data Security**
- **Uniform Physical Condition Standards (UPCS)** – for maintenance staff

3. Role-Specific Technical Training

Timeframe: Initial 3–6 months; as needed for updates

Examples by Department:

- **Property Management Staff:** Lease enforcement, rent calculation, REAC inspections, resident relations
- **Maintenance Staff:** Safety protocols, preventive maintenance, work order systems, lead-based paint awareness
- **Housing Choice Voucher Staff:** Eligibility determination, HQS inspections, rent reasonableness, program compliance
- **Administrative/Finance Staff:** Procurement standards, financial reporting, HUD systems (e.g., PIC, EIV, REAC)

4. Customer Service and Professional Development

Timeframe: Ongoing

Focus Areas:

- Effective communication and conflict resolution
- Cultural sensitivity and diversity awareness
- De-escalation and trauma-informed engagement
- Time management and organizational skills
- Community resource coordination

5. Safety and Risk Management

Timeframe: Annual refresher or as required

Topics:

- Workplace safety (OSHA compliance)
- Hazard communication and chemical safety (if applicable)
- Emergency response and evacuation procedures
- Incident reporting protocols
- Defensive driving (for employees using AMHA vehicles)

6. Continuing Education and Certification

Timeframe: As required by role or funding source

Examples:

- Public Housing Manager (PHM) Certification
- Housing Choice Voucher Specialist Certification
- HQS or UPCS Inspector Training
- Supervisory/Leadership Development Programs

7. Performance and Training Evaluation

Frequency: Annual review

Process:

- Training completion tracked in employee file
- Supervisors identify skill gaps and recommend additional training
- Continuous improvement through feedback and updated HUD guidance

Statement for Job Descriptions

Training and Development:

Employees are required to participate in all AMHA-mandated training programs, including initial orientation, compliance, safety, and role-specific instruction. Ongoing professional development and certification maintenance are essential components of the position to ensure adherence to HUD regulations and AMHA policies.

Preventative Maintenance Plan

Ashtabula Metropolitan Housing Authority (AMHA)

1. Purpose

The purpose of this Preventive Maintenance Plan (PMP) is to establish a systematic approach for maintaining AMHA's housing units, facilities, and equipment. The goal is to reduce unplanned repairs, extend asset life, ensure resident safety, and maintain compliance with HUD and local regulations

2. Objectives

- Maintain safe, decent, and sanitary housing for all residents.
- Preserve AMHA's physical assets through proactive maintenance.
- Reduce emergency and deferred maintenance costs.
- Ensure compliance with HUD's Uniform Physical Condition Standards (UPCS) and local building codes.
- Enhance resident satisfaction and reduce turnover.
- Support sustainability through energy-efficient maintenance practices.

3. Scope

This plan applies to all AMHA-owned and managed properties, including:

- Public Housing Developments
- Administrative Offices
- Community Centers
- Maintenance Shops and Garages
- Common Areas and Grounds

4. Roles and Responsibilities

Role	Responsibilities
Executive Director	Approves PMP and ensures compliance with HUD regulations.
Facilities Director / Maintenance Supervisor	Implements PMP, schedules inspections, and oversees staff.
Maintenance Technicians	Perform inspections, preventative tasks, and report issues.
Property Managers	Coordinate access and communicate with residents.
Residents	Report maintenance concerns promptly.
Procurement Officer	Source parts, materials, and contractor services.

5. Preventive Maintenance Program Structure

5.1 Scheduled Maintenance

Regularly scheduled tasks are designed to prevent breakdowns or code violations.

Frequency	Task Examples	Responsible Party
Daily	Grounds cleanup, trash removal, and check common areas	Maintenance Staff
Weekly	Test emergency lighting, inspect boilers, and HVAC filters	Maintenance Staff
Monthly	Check fire extinguishers, inspect smoke detectors, and test sump pumps	Maintenance Staff
Quarterly	Replace HVAC filters, inspect roofs and gutters, check plumbing fixtures	Maintenance Staff
Semi-Annually	Pest control, inspect electrical systems, check window and door seals	Contractor/Maintenance Staff
Annually	Comprehensive building inspections, elevator service, backflow testing, and painting touch-ups	Contractors / Maintenance Staff

5.2 Predictive Maintenance

Use condition-based monitoring and data (e.g., HVAC performance logs, utility usage) to predict and address issues before they occur.

- Utilize a **Computerized Maintenance Management System (CMMS)** to track work orders and asset history.
- Review trends in repair frequency and energy consumption.
- Replace components showing early signs of wear (belts, bearings, etc.).

5.3 Seasonal Maintenance

<u>Season</u>	<u>Tasks</u>
Spring	Clean gutters, inspect roofs, test air conditioning, landscape prep
Summer	Inspect and service cooling systems, repair exterior surfaces
Fall	Furnace inspections, gutter cleaning, insulation checks
Winter	Snow removal readiness, pipe freeze prevention, heating system monitoring

6. Inspections and Documentation

- **Routine Inspections:** Conducted monthly by maintenance staff using standard checklists.
- **Annual UPCS Inspections:** Conducted per HUD requirements.
- **Documentation:** All inspections, repairs, and replacements logged in CMMS with date, responsible party, and follow-up actions.
- **Record Retention:** Maintain records for at least five (5) years in accordance with HUD and state requirements.

7. Training and Safety

- Staff will receive annual training on:
 - Building systems (HVAC, plumbing, electrical)
 - HUD inspection standards
 - OSHA and EPA safety compliance
 - Proper use of tools and protective equipment

8. Inventory and Asset Management

- Maintain an updated inventory of critical equipment, tools, and spare parts.
- Assign unique ID numbers to major assets (e.g., boilers, HVAC units).
- Review inventory quarterly to ensure parts availability for high-frequency repairs.

9. Contractor Management

- Maintain a list of approved contractors for specialized services (elevators, pest control, fire systems).
- Evaluate contractor performance annually.
- Ensure all contractors carry appropriate licensing, insurance, and meet HUD procurement standards.

10. Performance Metrics

Track key indicators to evaluate PMP effectiveness:

- Work order completion rates
- Average response and repair times
- Cost per unit maintained
- Emergency repair frequency
- Resident satisfaction survey results
- HUD inspection scores (REAC/NSPIRE)

11. Continuous Improvement

- Conduct quarterly maintenance review meetings.
- Analyze trends in maintenance data to identify recurring issues.
- Update PMP annually based on results, staff feedback, and HUD guidance.

12. Appendices

- **Appendix A:** Sample Preventive Maintenance Checklist
- **Appendix B:** Equipment Inventory Log Template
- **Appendix C:** Inspection Report Template
- **Appendix D:** Annual Maintenance Calendar