

PHA OPERATIONAL REPORTS

IDENTIFYING RED FLAGS

Presented by Janice Gibbons



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**RUNNING A HOUSING
AUTHORITY IS AKIN
TO STEERING A SHIP**

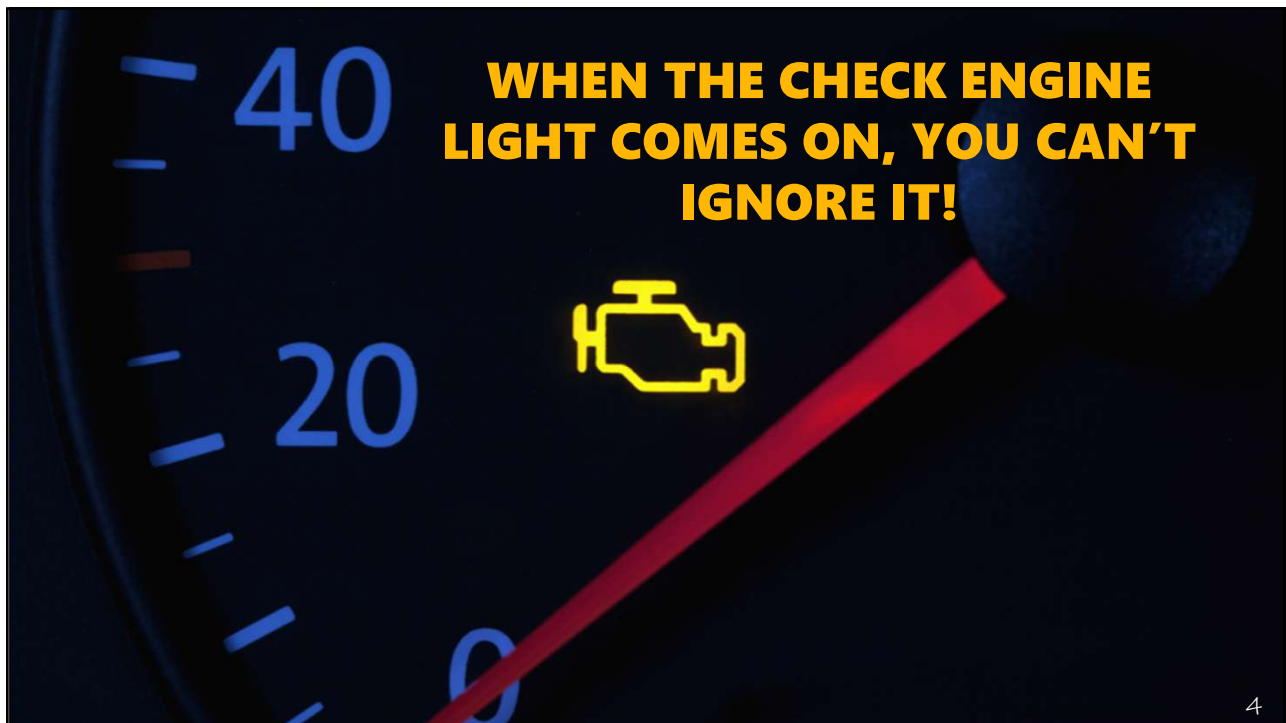


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IN THIS SESSION.....

- Identify Key Performance Indicators (KPIs)
- Occupancy & Utilization
- Physical Inspections
- Financial Red Flags
- Assessment Models
- Reports to Utilize
- Policy Development
- Internal Controls
- Asking for Help

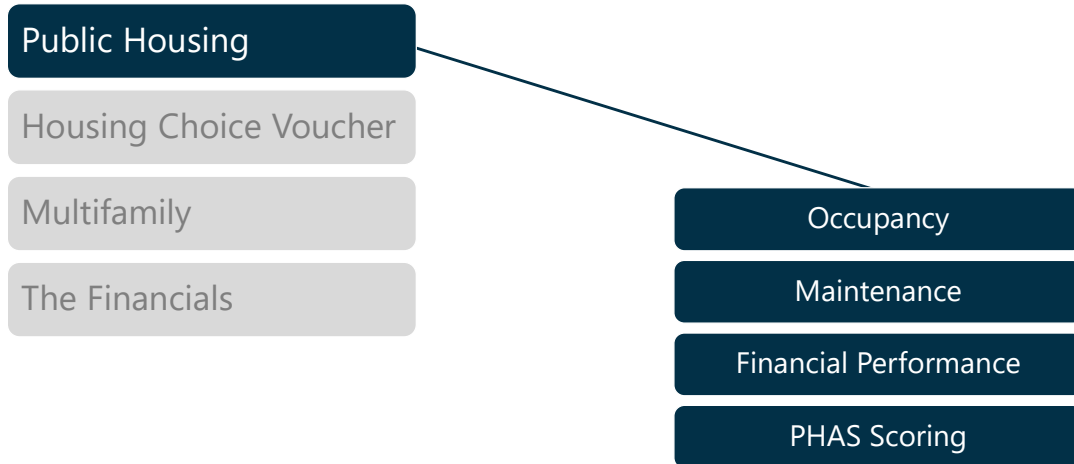
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IDENTIFYING KEY PERFORMANCE INDICATORS (KPI)

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KEY PERFORMANCE INDICATORS (KPI)

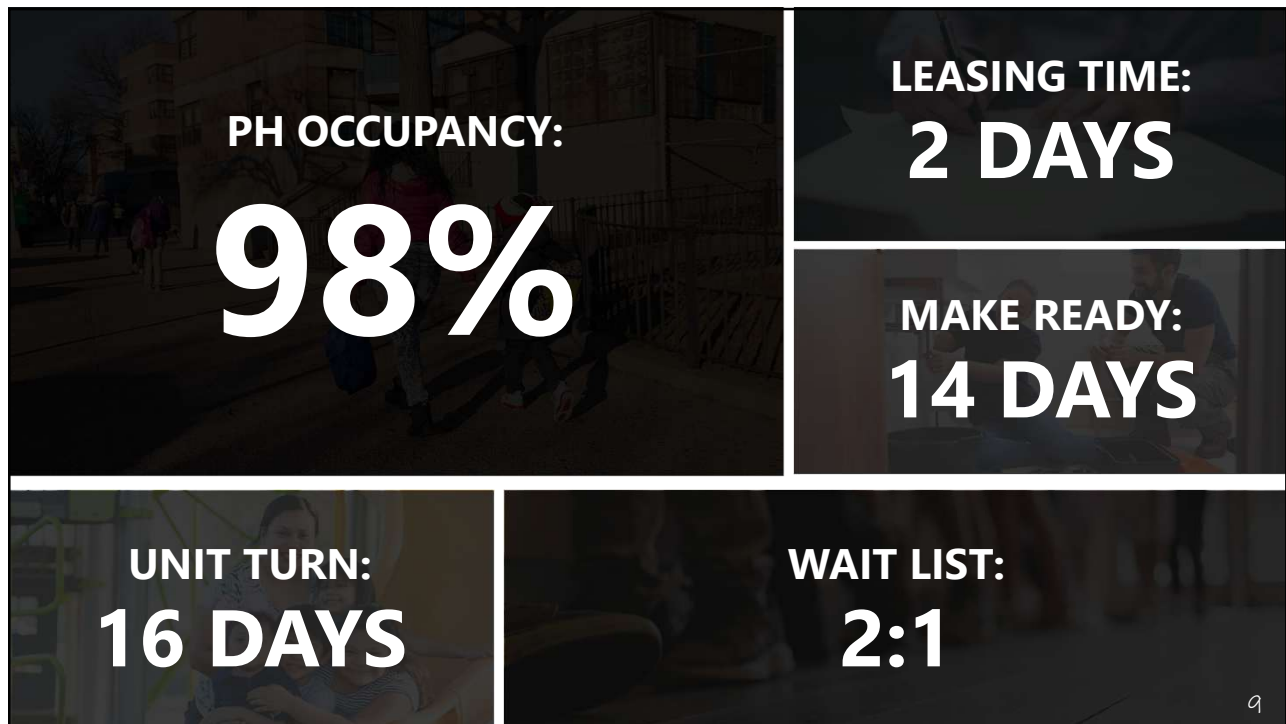


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PUBLIC HOUSING OCCUPANCY MEASURES

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PUBLIC HOUSING MAINTENANCE MEASURES

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ROUTINE:
30 DAYS

URGENT:
3 DAYS

EMERGENCY:
24 HOURS

WORK ORDERS

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UNIT TURN TIMES
MAKE READY

DOWN TIME:
4 DAYS

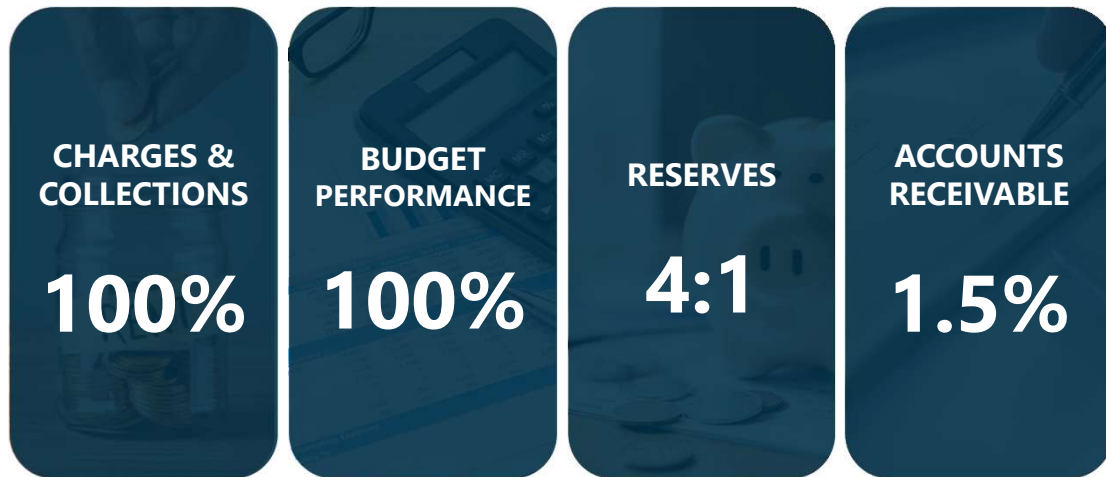
MAKE READY:
14 DAYS

12

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PUBLIC HOUSING KPIs

FINANCIAL

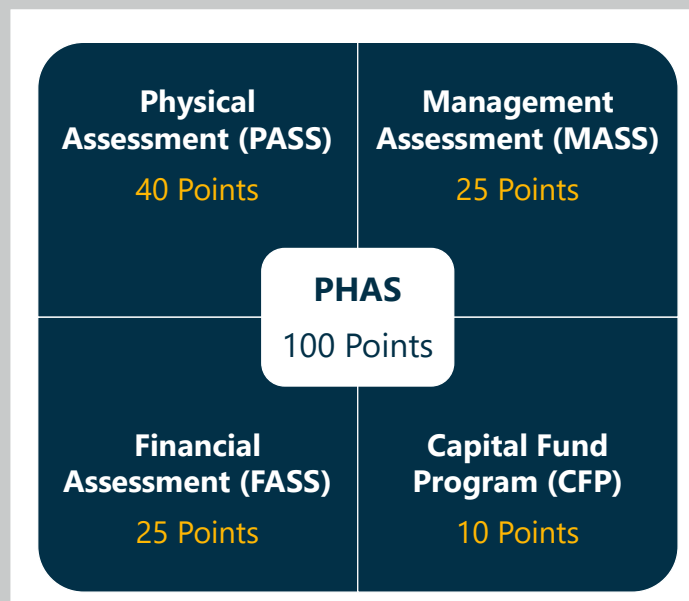


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PUBLIC HOUSING KPIs

PHAS



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PHAS DESIGNATION STATUS

PHAS Designation	Composite PHAS Score	Individual Indicator Score
High Performer	Overall score of 90% or higher AND →	At least 60% of points each for PASS(24), FASS(15), MASS(15) & 50% of points for CFP(5)
Standard Performer	Overall score of at least 60% AND →	At least 60% of points each for PASS(24), FASS(15), MASS(15) & 50% of points for CFP(5)
Substandard Performer	Overall score of at least 60% BUT →	Less than 60% in one or more of PASS, FASS or MASS Indicators
Troubled	Less than 60% overall score	
CFP Troubled	----	Less than 50% on CFP Indicator

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REPORTS PUBLIC HOUSING



- Wait List Updates/Ratios
- Occupancy/Vacancy (Site/Program)
- Work Orders
- Unit Turnarounds

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HCVP UTILIZATION MEASURES

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KEY PERFORMANCE INDICATORS (KPI)

Public Housing

Housing Choice Voucher

Multifamily

The Financials

Voucher/Funding Utilization

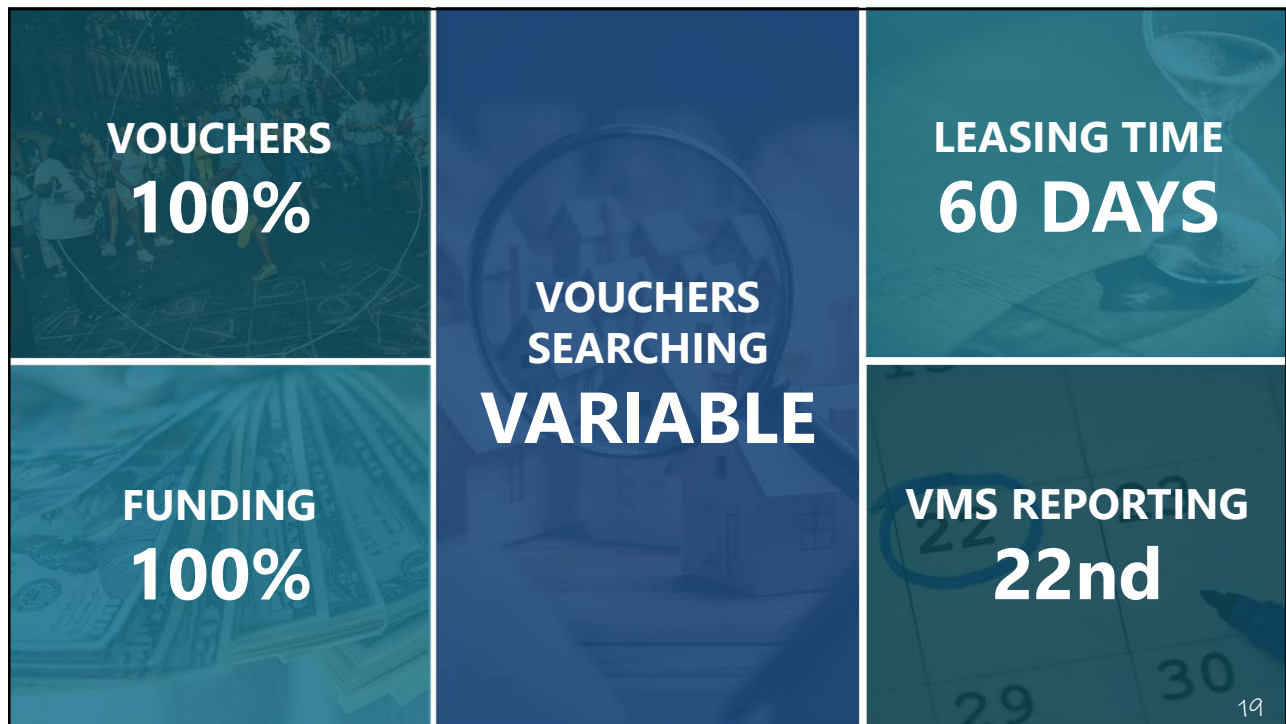
Program Reserve Position

Inspection Processes

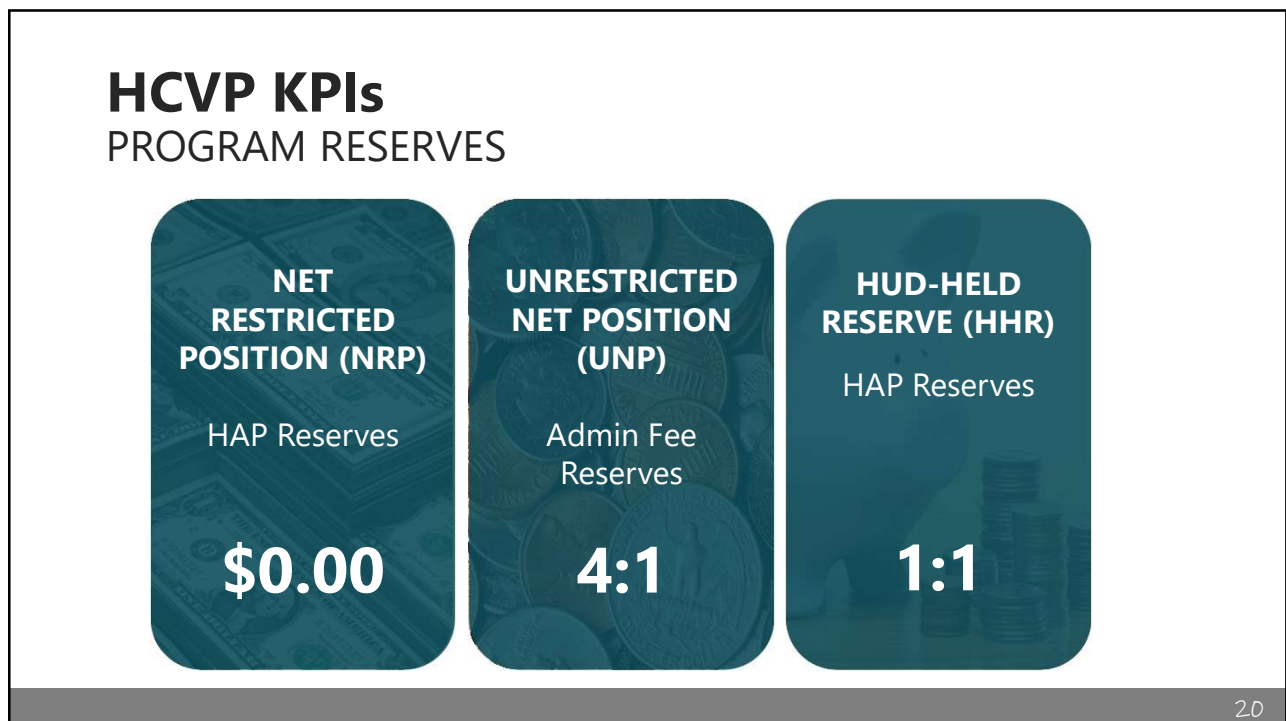
SEMAP Scoring

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HCVP INSPECTION MEASURES

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PRE-LEASE UP (INITIALS)	ANNUALS	QUALITY CONTROL	ENFORCEMENT
UNIT MUST PASS PRIOR TO LEASING DATE	UNIT MUST PASS ANNUALLY OR BIENNIELY	SAMPLE SIZE BASED ON PHA VOUCHERS	PHA ABATES OR TERMINATES ACCORDING TO POLICY
100%*	100%	100%	100%

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SECTION EIGHT MANAGEMENT ASSESSMENT PROGRAM (SEMAP)



14 Indicators



Occupancy
Processes



Inspection
Processes



Standard is
100%

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REPORTS HOUSING CHOICE VOUCHER (HCV)



- Annual Contributions Contract (ACC)
- Utilization (*leased voucher and \$\$*)
- Program Financials (*reserves*)
- VMS Submissions
- Voucher Activity

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MULTIFAMILY

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KEY PERFORMANCE INDICATORS (KPI)

Public Housing

Housing Choice Voucher

Multifamily

The Financials

Occupancy

Maintenance

Financial Performance

MOR Scoring

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MULTIFAMILY KPIs – MOR

Similar assessment to PHAS, with
a few differences

Basically, same scoring scale also,
with different phrasing

Overview of all agency operations:
Admin > Occupancy > Maintenance



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MOR COMPONENTS

- Desk Review
- On-Site Review
- Summary Report
- Response to Summary Report
- Management Follow-Up

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MOR SCORING



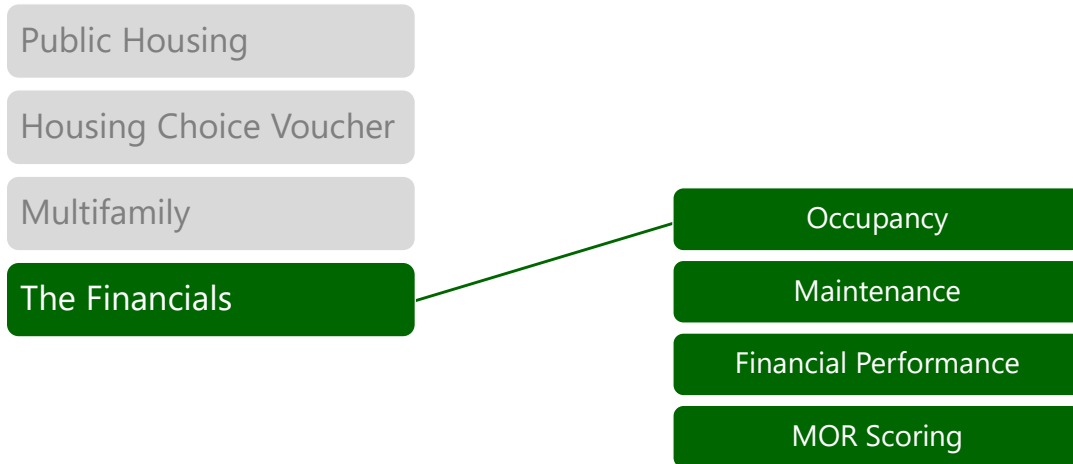
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THE FINANCIALS

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KEY PERFORMANCE INDICATORS (KPI)



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**AGENCY DECISIONS
AND ACTIONS ARE FED
THROUGH A DETAILED,
DOCUMENTED, AND
APPROVED BUDGETING
AND MONITORING
PROCESS**

**IT'S CRITICAL TO UNDERSTAND HOW
THE REPORTS TELL THE FINANCIAL
STORY OF THE AGENCY**

**THE
"FINANCIALS"**

**COST
PRINCIPLES**

**SUBMISSION
DEADLINES**

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THE “FINANCIALS”

- Budget
- Claims
- Cash Flow
- Operating Statement
- Balance Sheet
- Financial Data Schedule (FDS)

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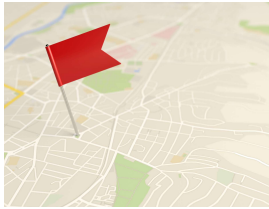
UNDERSTANDING THE REPORTS

- Check the math
- Find the bottom line
- Compare
- Think about logical relationships

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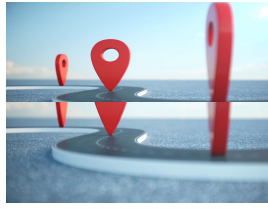
TYING THE FINANCIAL REPORTS TOGETHER



Where You Are
(Balance Sheet)



How You
Got Here
(OPS Statement)



Where
You Are Going
(Budget)



Resources
to get Here
(Cash Flow)

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**LEARNING TO SPOT THE “RED
FLAGS” CAN HELP ENSURE
YOUR AGENCY STAYS ON TRACK**



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Rising Debt
Revenue Trending Down
Unauthorized Expenses

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Unsteady Cash Flow
Rising Accounts Payable
and Receivable
Pending Litigation

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Shrinking Reserve Position
Lack of Internal Controls
Agency Salaries and Benefits

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ASK QUESTIONS

Tough Questions
The Only Stupid Questions...
Who Can I Ask for Help?



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REPORTS FINANCIAL



- Annual Contributions Contract (ACC)
- Utilization (*leased voucher and \$\$*)
- Program Financials (*reserves*)
- VMS Submissions
- Voucher Activity

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