

The **Nelrod** Company®

PUBLIC HOUSING: A MANAGEMENT PERSPECTIVE

PART 1

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**RUNNING A PUBLIC
HOUSING PROPERTY IS
LIKE STEERING A SHIP.**

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IT'S INCREDIBLY EASY
TO GET COMPLETELY
DISTRACTED
AND RUN OFF COURSE

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WHAT IT TAKES TO BE GREAT

- Leadership
- Knowledge of laws and regulations
- Understanding of financials
- Facility maintenance and management
- Communication skills are a MUST
- Customer service

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BUT ALSO...

- Tenant relations and community engagement
- Crisis and emergency management
- Conflict resolution
- Data analysis and performance tracking
- Adaptability and flexibility

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FAIR AND EQUITABLE HOUSING FOR ALL

HAPPY RESIDENTS

OUTSTANDING OCCUPANCY

COMPLIANCE

WELL-MAINTAINED PROPERTIES

FINANCIAL STABILITY

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EMERGENCY PREPAREDNESS

POSITIVE COMMUNITY REPUTATION

LESS CRIME

STRONG WORK FORCE

HIGH PERFORMER

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**SAID ANOTHER
WAY...**

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**WHAT DOES
NOT CRUSHING IT
LOOK LIKE?**

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NOT CRUSHING IT

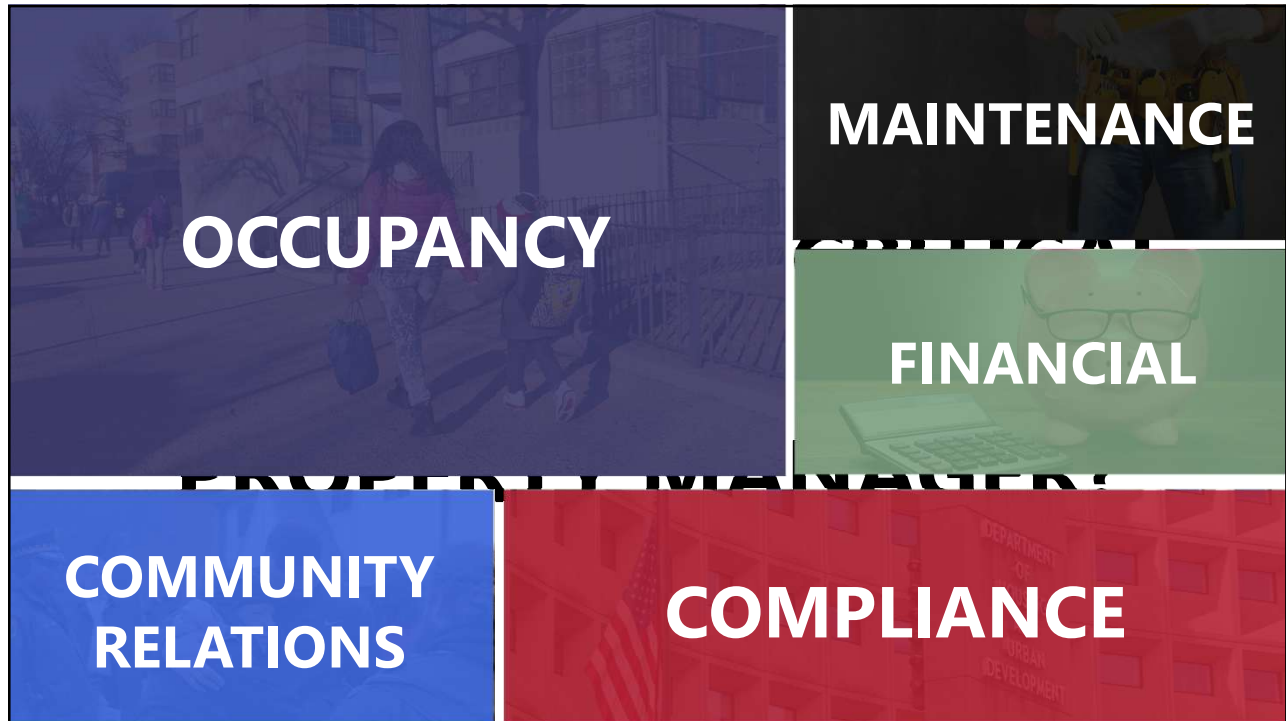
- High vacancy
- Financially troubled
- Deteriorated properties
- Unhappy residents
- Non-compliance and HUD monitoring
- Fair Housing complaints

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SOOOOOO...
WHICH ARE YOU?

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WHERE SHALL WE FOCUS?

- Appearance and marketability
- Maintenance and upkeep
- Occupancy
- Financial responsibility
- Systems
- Pest control
- Tenant relations
- Fair housing
- Staff development

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WHY IT IS IMPORTANT

- Increased tenant satisfaction and retention
- Improved leasing rates
- Enhanced safety and security
- Stronger community perception/reputation
- Operational efficiency

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WHAT CAN GO WRONG?

- High vacancy rates
 - Increased crime and safety issues
 - Poor public perception/reputation
- Tenant dissatisfaction and poor community engagement
 - Funding implications

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APPEARANCE & MARKETABILITY

- Appearance and curb appeal
- Upkeep and preventive maintenance
- Tenant satisfaction
- Safety and security
- Community perception
- Affordability



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APPEARANCE & MARKETABILITY

- Drive/walk the property
- The Racetrack
- Work orders
- Preventive maintenance logs
- Visitor and community feedback
- Leasing and vacancy data



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APPEARANCE & MARKETABILITY

- Engage the residents
- Work with the City/County
- Police and Security
- Neighborhood Watch
- Community forums
- Online presence



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APPEARANCE & MARKETABILITY

- Daily, Weekly, Monthly
- Use Checklists
- Tenant Meetings and Follow-up
- Lease Violations



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APPEARANCE & MARKETABILITY MEASURES

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| | | |
|---|---|---|
| <p>MOWING AND LANDSCAPING: EVERY TWO WEEKS</p> | <p>ADDRESS TENANT COMPLAINTS: 72 HOURS</p> | |
| <p>MAKE TIME FOR LITTER DAILY</p> | <p>ENGAGE THE COMMUNITY ROUTINELY</p> | <p>LIGHTING AND SECURITY MEASURES: TREAT AS URGENT</p> |
| | | <p>GRAFFITI COMES DOWN THE SAME DAY IT GOES UP</p> |

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ROUNDTABLE

*Think about your properties,
pertaining to curb appeal.
What are you most **proud of**?
What are your **opportunities**?*

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MAINTENANCE

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WHY IT IS IMPORTANT

- Efficient occupancy processes
- Safe and healthy living conditions
- Tenant satisfaction & retention
- Effective maintenance cost control
- Improves community perception
- NSPIRE compliance

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WHAT CAN GO WRONG?

- Increased vacancies
- Health and safety risks
- Decline in resident satisfaction
- Financial consequences
 - Increase in crime
- Noncompliance with NSPIRE

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MAINTENANCE & UPKEEP

- Work order response/completion time
- Preventive v. Reactive ratio
- Unit turnaround time
- Backlog and outstanding repairs
- Cost efficiency
- NSPIRE compliance
- Staff productivity



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MAINTENANCE & UPKEEP

- Work order reports and logs
- Preventive maintenance reports
- Emergency maintenance
- Resident complaints
- Cost efficiency
- Annual inspections
- Inventory reports



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MAINTENANCE & UPKEEP

- Maintenance staff
- Tenants
- Contractors/vendors
- Community stakeholders
- Local law enforcement



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MAINTENANCE & UPKEEP

- Work order reports
- Annual inspection forms and work orders
- Unit turn work orders and reports
- Financials – expense statements



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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

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EVERY UNIT:
ANNUALLY

REGULAR REPAIRS:
30 DAYS

LTHS/SEVERE:
24 HOURS

ANNUAL INSPECTIONS

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ROUNDTABLE

*What are the **biggest challenges** you face in maintaining your properties, and what **strategies** have been most effective?*

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OCCUPANCY

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WHY IT IS IMPORTANT

- Maximized resources
- Increased financial potential
- Enhanced sense of community
- Resident engagement and investment
- Housing security and stability
- **The entire reason we exist**
- Ummm. PHAS

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WHAT CAN GO WRONG?

- Financial instability
- Deterioration of property conditions
- Increased crime and safety concerns
- Negative community perception/reputation
 - Unmet housing needs
 - Lower PHAS scores

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OCCUPANCY

- Occupancy/Vacancy rates
- Turnover rates
- Average make ready days
- Average leasing days
- Recertifications
- Wait list metrics



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OCCUPANCY

- Occupied units
- Unit-days/months leased
- Annual recertification
- New admissions
- Wait list
- ELI



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OCCUPANCY

- Occupancy specialists
- Maintenance staff
- Tenants
- Applicants
- Other agencies



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OCCUPANCY

- Occupancy reports
- 50058/PIC reporting
- Unit-days leased / unit-days available
- Unit-months leased / unit-months available
- Wait list adequacy (ratios to expected turns)
- PHAS scores in MASS and CFP indicators



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OCCUPANCY MEASURES

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| | | |
|---|---------------------------------------|--|
| <p>PH OCCUPANCY: 98%</p> | <p>MAKE READY: 18 DAYS</p> | |
| <p>AVERAGE WAIT LIST TIME: 6 MOS.*</p> | <p>WAIT LIST RATIO 2:1</p> | <p>LEASING TIME: 2 DAYS</p> |
| | | <p>TOTAL TURN: 20 DAYS</p> |

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ROUNDTABLE

How is occupancy going at your property? Are you having issues filling vacant units?

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FINANCIAL POSITION

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WHY IT IS IMPORTANT

- Fiduciary responsibility
- Optimizing income and resources
- Assist the optimal number of families
- Regulatory compliance
- Preventing fraud, waste, and mismanagement
- Public perception

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WHAT CAN GO WRONG?

- Lack of income – rental and subsidy
- Lack of resources to serve our resident families
 - Deterioration of the properties
 - Staff reductions & low morale
 - Lower assessment scores
 - HUD non-compliance
 - Poor public perception

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FINANCIAL POSITION

- Budget performance/variance
- Reserve position/excess cash
- Income/expense
- Rent/charges collection (TAR)
- The "financials"
- PHAS financial indicators



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FINANCIAL POSITION

- Income/expense reports
- Financial data submission
- Claims and bills
- Collection tracking | 30-day notices



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FINANCIAL POSITION

- Executive Director
- Financial staff
- Property staff
- Maintenance staff



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FINANCIAL POSITION

- Monthly review
- Budget-to-actual
- Income-to-expense
- Reserve position



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TYING THE FINANCIAL REPORTS TOGETHER



WHERE YOU ARE

BALANCE SHEET



**HOW YOU GOT
HERE**

OPS STATEMENT



**WHERE YOU'RE
GOING**

BUDGET



**RESOURCES TO
GET THERE**

CASH FLOW

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DON'T GET OVERWHELMED

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

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FINANCIAL MEASURES

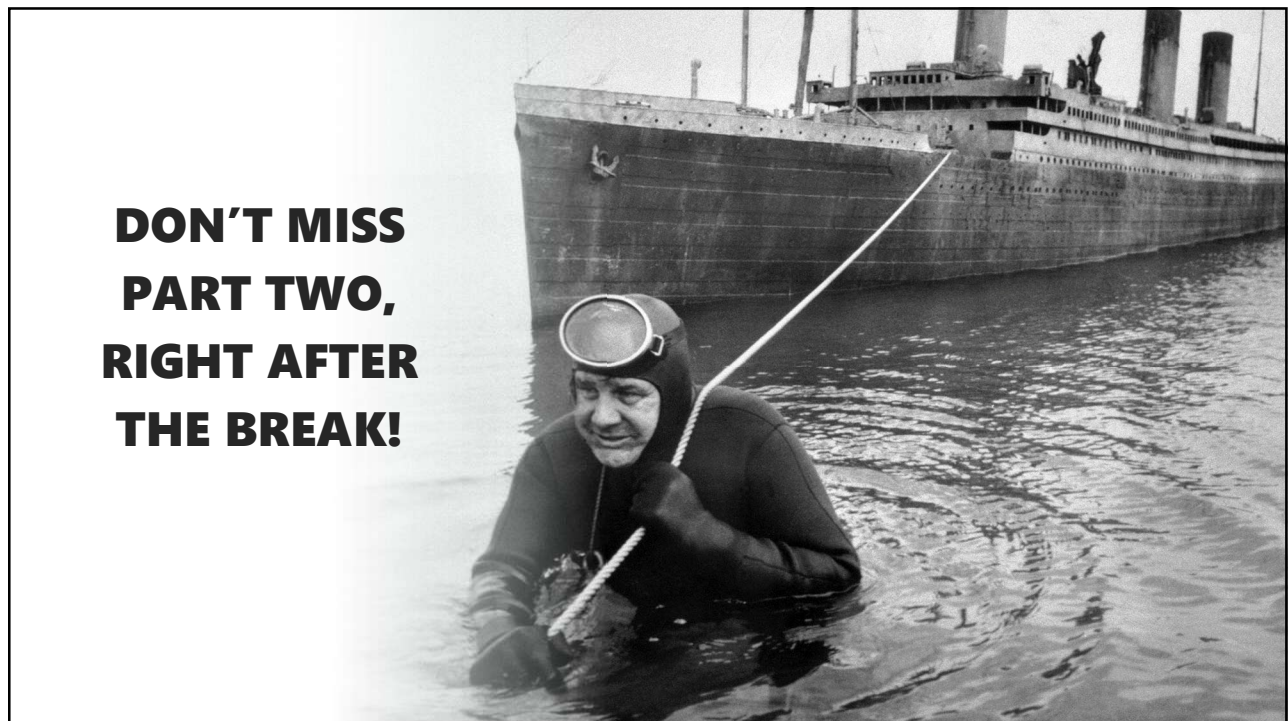
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| | | |
|---|---|---|
| INCOME TO EXPENSE: 100% | | RESERVE POSITION: 6:1* |
| CHARGES AND COLLECTIONS 100% | | BUDGET VARIANCE: < 5% |
| TAR: < 2.5% | ACCOUNTS PAYABLE: < 30 DAYS | |

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