

**Excellence is NOT by Accident**



***“Excellence is a habit not an act. It takes Practice and Perseverance.”***

# Panelists



**Brad Senick FHC, CPO**  
**Vice President**  
**Moravian Development Corporation**



**Peg DeAngelo FHC, CPO**  
**Manager**  
**Moravian Houses**



**Mike Muschko**  
**Maintenance Manager**  
**Moravian Houses**



# Session Objectives



1. Provide Tips to Increase Physical Inspection Score

2. Provide Tips to Prepare for a MOR

3. Promote Positive Communication Between Management, Maintenance and Residents

4. Promote Positive Communication with PHFA

# Session Scope



## Preparing for Physical Inspections

- Preparing Staff
- Preparing Residents
- Pre-Inspections
- Follow Up
- Inventory

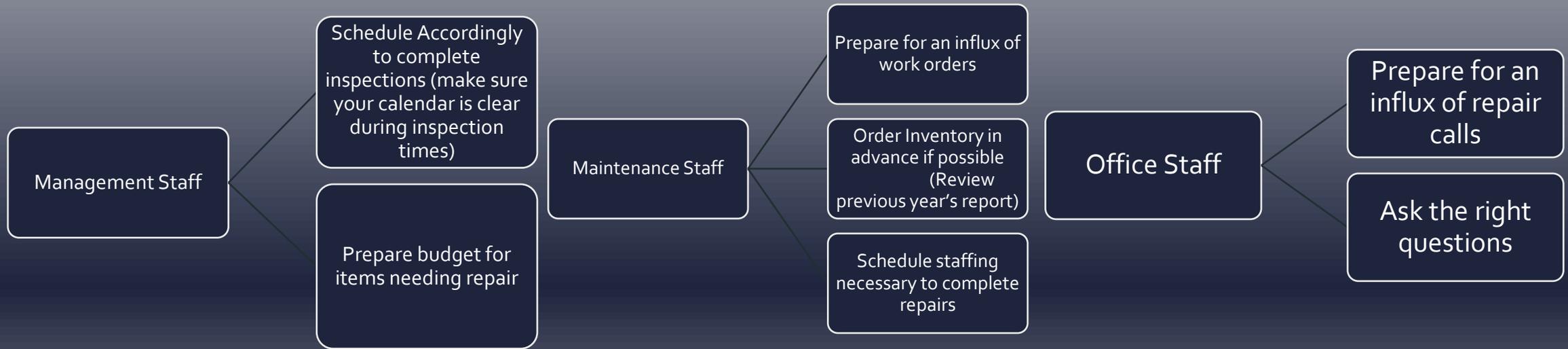
## Preparing for a MOR

- File Inspection
- Office Preparation
- Management Checklist

## Effective Communication

- Resident Communication
- Notices
- Communication with PHFA

# Preparing for Physical Inspections



# Preparing for Physical Inspections

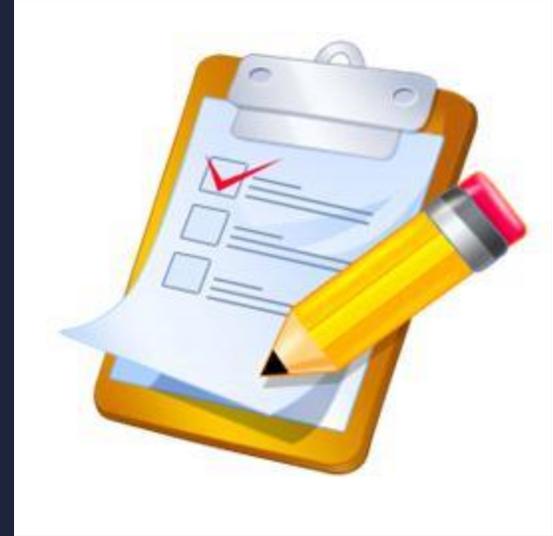
## *Preparing Residents*

Create a checklist for residents

Items to Include:

- What you're looking For
  - ✓ Code Violations
  - ✓ Outlet Testing
  - ✓ Burned Out bulbs
  - ✓ Unsanitary Conditions
  - ✓ Egress
  - ✓ Infestations
- Instruction for reporting deficiencies
- Follow Up Procedure

Hold Floor Meetings when possible to address concerns and inform residents of your expectations.



Notice to Residents  
Inspection of Moravian House III  
**October 19, 2015 until October 30, 2015**  
**from 9:00AM to 3:00 PM**

Please review this list and place a checkmark beside every item that is in good working order and is clean. If a work order is needed, call the office to schedule the work to be done. **This checklist is for your use only – do not bring it to the office.** This will get your apartment ready to pass inspection. Please start getting ready now. If there's a checkmark next to everything listed below, your apartment will pass.

- Entrance Doors and Frames: Clean inside and outside your entry door. Door must close tight on its own.
- Refrigerators: need to be clean, defrosted and free from damage. Clean refrigerator and freezer gaskets of mold and/or food debris. Food must be moved from around the unit in freezer – overstuffed freezers will prevent the unit from working properly.
- Stoves/Oven: must be cleaned inside & out. No food to be stored in the oven!
- Countertops & Cabinets: clean and uncluttered. We must get to the outlets to check that they are working properly.
- Closets, under sinks: Must be clutter-free. All open food must be in plastic containers or sealed plastic bags to prevent infestations.
- Water Heaters: Remove all items from top of water heater.
- Lights, fixtures: Report any burned out light bulbs in kitchen and bathroom. Report any cracked or broken switch plate covers.
- Overloading of outlets: Use surge strips to prevent overloading the outlets.
- Floors: Kitchen and bathroom floors cleaned.
- Report any damage to walls or doors.
- Closet doors: Remove clutter.
- Bathrooms: Entire area must be cleaned. Tub area must be clean and free from mildew and soap scum. Spray diluted bleach with water to clean.
- Exhaust fans: Must be working. May not be disconnected or taped.
- Clutter: Remove all items away from the windows – this area must be clear in case of fire or emergency. All items are to be moved away from heaters.
- Entire apartment: clean, free from open food, garbage, clutter, mildew and infestations.
- Infestations: Management will be checking each apartment for all types of infestation. Management will be checking mattress, box springs and other furniture for infestations. Contact the office if you're aware of any potential problem so we can call the exterminator.
- Transfer any items in cardboard boxes to plastic containers where possible.

Thank you in advance for your cooperation.  
Management, Moravian Houses

# Preparing for Physical Inspections

## *Completing Pre-Inspections*

### Grounds:

- Curb Stops-Missing or Moved
- Walkways-Heaved or Uneven
- Parking Lot-Cracks/Sealing
- Trees/Shrubs-Overgrown/Hazards
- Drains-Clogged
- Check Roofing-Fans operational and flashing intact



## Heaved Sidewalk

Example of a sidewalk observed during a grounds inspection that needs repair to prevent a tripping hazard.



## Repaired Sidewalk

Example of a sidewalk repaired properly. Note no more paint and no more tripping hazard.

# Preparing for Physical Inspections

## *Completing Pre-Inspections*

Common Areas:

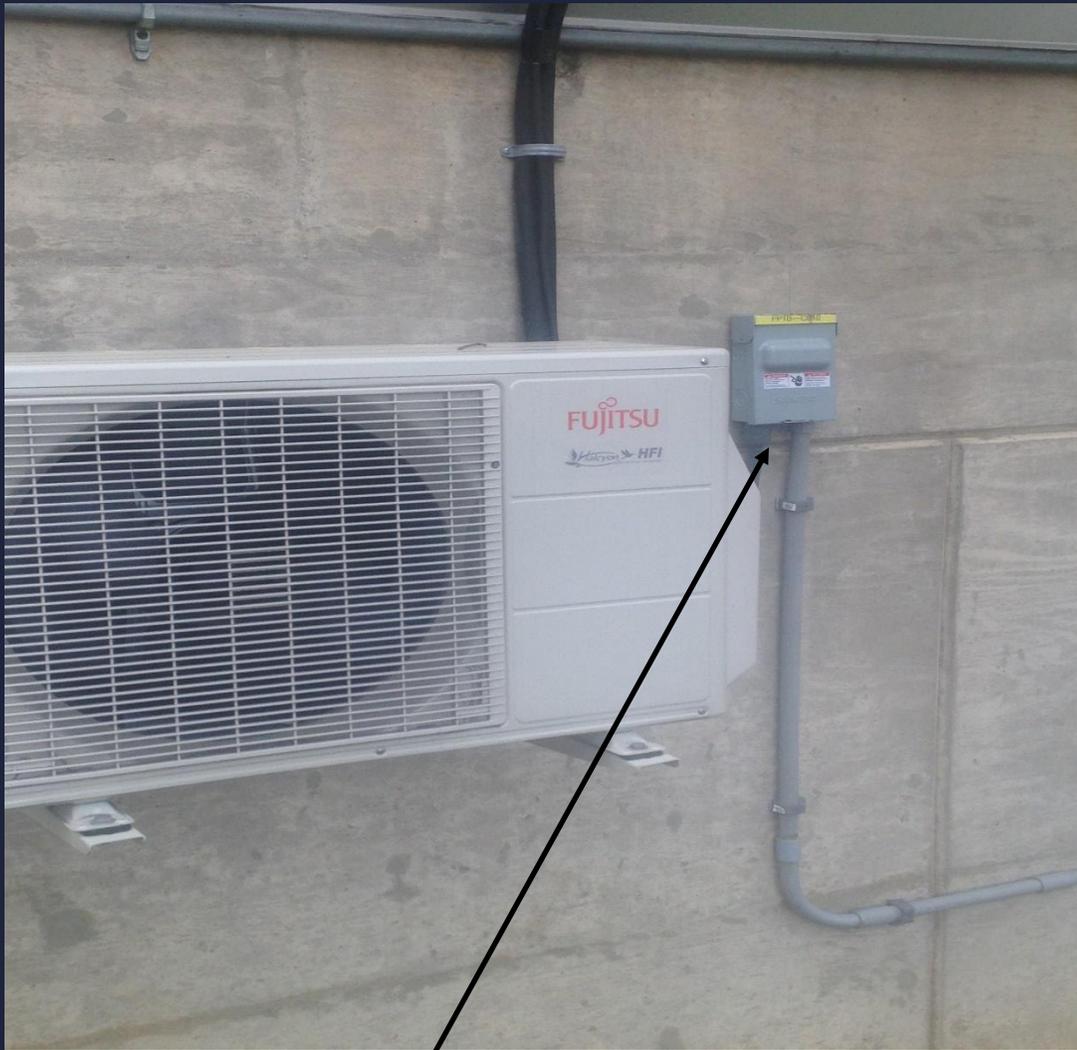
- ✓ Walls-Cracks and holes
- ✓ Flooring-Cracked/missing tiles, loose tiles
- ✓ Windows-broken seals, missing screens
- ✓ Fire Extinguishers-Over/Undercharged, not inspected, missing tags
- ✓ Lights and Bulbs-Flickering/Burned Out/Cracked Lenses
- ✓ HVAC-Make sure all units work
- ✓ Disconnects-locked or not accessible
- ✓ Outlets-broken outlets or plates
- ✓ Compactor & Mechanical Room
- ✓ Smoke detectors installed & in working order
- ✓ Pests



Post Construction Hole in Wall



Wall Repaired



Disconnect Not Secured



Disconnect which is properly tagged & secured



Fire Pump with leaks & fluid



Leak repaired and area cleaned

# Preparing for Physical Inspections

## *Completing Pre-Inspections*

Individual units:

- ✓ Walls-Cracks and holes
- ✓ Refrigerator/Freezer-Broken/Mold gasket
- ✓ Range-Missing Gasket, Burners not functioning
- ✓ Flooring-Cracked/missing tiles, loose tiles
- ✓ Windows-broken seals, missing screens
- ✓ Fire Extinguishers-Over/Undercharged, not inspected
- ✓ Lights and Bulbs-Flickering/Burned Out
- ✓ HVAC-Make sure all units work
- ✓ Disconnects-locked or not accessible
- ✓ Outlets-Broken outlets or plates
  - ✓ All GFCI's should be tested
- ✓ Entry Door-Should close and latch automatically
- ✓ Plumbing-Leaks, P Traps, broken stoppers, faucets
- ✓ Water Heaters-rusted, leaking, missing relief valve
- ✓ Tubs/Shower-Leaking heads, leaking spout, mold
- ✓ Pests-Infestations



Bathtub Drain rusted through



Bathtub and Drain replaced



Broken Outlet



Repaired outlet

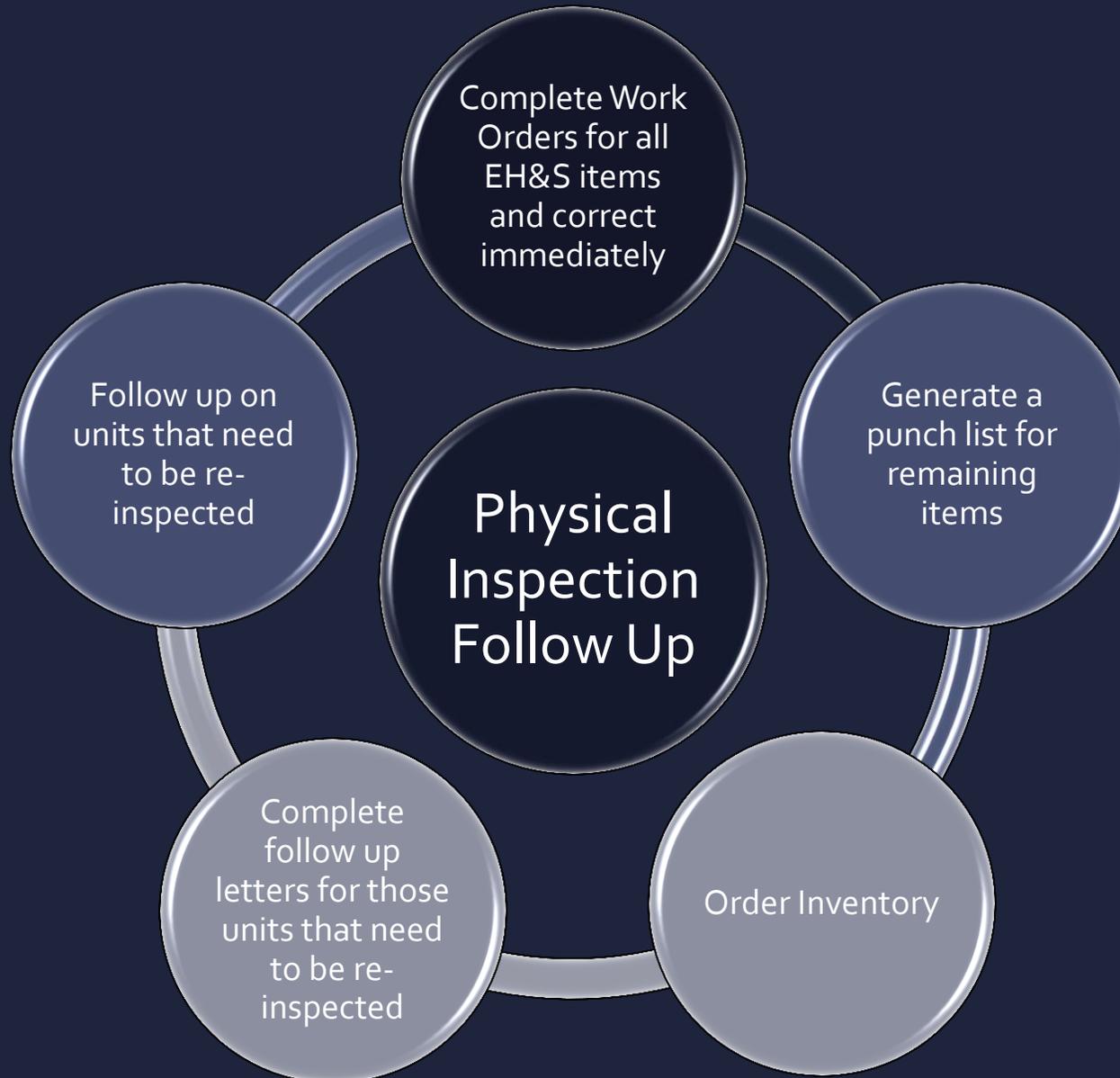


Broken Outlet Cover



Repaired Outlet Cover

# Preparing for Physical Inspections



# Sample Punch List

		Bed Bugs:		DATE	UNIT #
		Pests:			
	Checked	Problem	Remedy	Date Repaired	Date Tenant Notified
<b>A: KITCHEN</b>					
	Light Fixtures				
	Switches/Outlets				
	Cabinets				
	Drawers/Hardware				
	Doors				
	Counter top				
	Counter top				
	Backsplash				
	Sink/Faucet/Drain/Stopper				
	Range/Oven				
	Exhaust Fan/Vent				
	Refrigerator				
	Floor				
	Closet Doors				
	GFI Recepticle				
	Other:				
<b>B: LIVING ROOM</b>					
	Switches/Outlets				
	Doors				
	Windows/Screen				
	Carpet				
	Walls				
	Heater Element				
<b>C: BEDROOM</b>					
	Switches/Outlets				
	Carpet				
	Windows/Screen				
	Doors				
	Night Light				
	Closet Doors				
	Heater Element				
	Other:				
<b>D: BATHROOM</b>					
	Lights				
	Doors/Hardware				
	Floor				
	Tub/Shower				
	Sink/Faucet/Drain/Stopper				
	Heater Element				
	Toilet/Toilet Seat				
	GFI Recepticle				
	Towel Bars/Toilet Paper Holder				
	Exhaust Fan/Vent				
	Other:				
	Comments:				



## Moravian Houses

BETHLEHEM, PA 18018  
BUILDING #1- 737 MAIN STREET  
PHONE: 610-691-8409 FAX: 610-691-1756  
BUILDING #2- 701 MAIN STREET  
PHONE: 610-861-0717 FAX: 610-866-6236  
BUILDING #3- 133 WEST UNION BOULEVARD  
PHONE: 610-691-3808 FAX: 610-691-3998  
BUILDING #4- 70 WEST NORTH STREET  
PHONE: 610-625-3131 FAX: 610-625-3132  
TTY: 800-654-5984 Voice: 800-654-5988  
Email: pdeangelo@moraviandevelopment.org



## Sample Follow Up Letter

Be specific where possible. Note the specific problem and expected solution.

October 25, 2013

Moravian House III  
133 W. Union Boulevard, Apt.  
Bethlehem, PA 18018

Dear:

Re: Apartment Inspection 10-22-13

Moravian House management inspected your apartment on October 22, 2013.

We have documented that your bathroom door hinges are pulling out of the wall due to the weight of an ironing board hanging on it. Please remove this hangar immediately. Maintenance will need to repair this door – we will let you know when it will be scheduled.

Management and maintenance will re-inspect the apartment in **approximately 10 days** to verify and document that this situation has been rectified by the requirements of the lease.

Should you have any questions, don't hesitate to contact me at 610-861-0717.

Sincerely,

Margaret M. DeAngelo  
Manager

# Inventory List

## 2012

### Recaulk bathroom sink to wall – legs?

203; 204; 205; 207; 208; 401; 405; 406; 407; 408; 409; 410; 412; 801; 802; 806;  
807; 810; 811; 1301; 1304; 1307; 1309; 1312; 1401; 1405; 1406; 1409; 1412;

### Bathroom faucet tight:

206; 407;

### New Shower Rod:

207; 407;

### New shower hose:

409; 1304; 1307; 1310; 1312; 1408;

### New Toilet Seat:

811; 1312; 1408;

### Bathroom Light bulbs:

1411;

### New Medicine Cabinet:

403;

### Kitchen sink faucet tight:

201; 203; 204; 207; 209; 212; 401; 402; 406; 409; 801; 803; 807;  
808; 810; 1302; 1306; 1310; 1404; 1406; 1407; 1408; 1409; 1411; 1412;

### New Oven/stove knobs:

204; 404; 405; 407; 1309; 1406; 1412;

### New Drip Pans:

205; 802; 805; 1306; 1307; 1309; 1310

### New rear burner:

805; 806;

### Oven Bulb:

202; 212; 405; 1309;

### Refrigerator Gasket:

1303; 1311;

### Kitchen light:

410;

### Night Light bulb:

204; 801; 805; 1309; 1411;

### Longer pull cords:

205; 210; 409; 411; 803; 809;

### Corner Guards:

204; 207; 210; 410; 801; 804; 1303;

### GFI's

208; 808; 811;

### Cracked outlet plates:

1312;

### Missing/old smoke detectors:

205; 211; 409; 412; 801; 1403; 1412

### Windows:

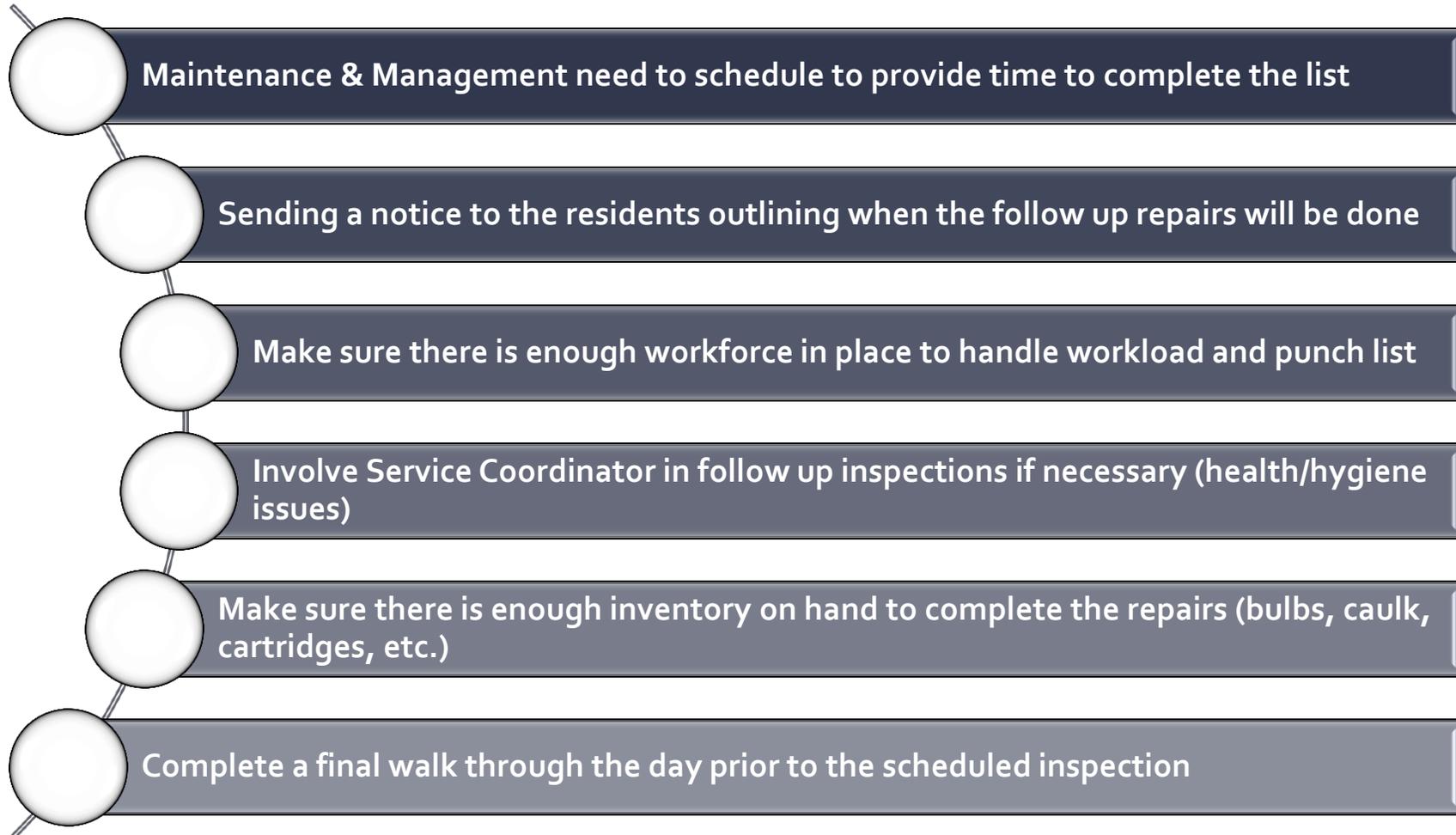
Upper and lower in bedroom

**SAMPLE  
Inventory List**

# Preparing for Physical Inspections

## *Follow Up*

Completing the Punch List:

- 
- Maintenance & Management need to schedule to provide time to complete the list
  - Sending a notice to the residents outlining when the follow up repairs will be done
  - Make sure there is enough workforce in place to handle workload and punch list
  - Involve Service Coordinator in follow up inspections if necessary (health/hygiene issues)
  - Make sure there is enough inventory on hand to complete the repairs (bulbs, caulk, cartridges, etc.)
  - Complete a final walk through the day prior to the scheduled inspection

# Preparing for a MOR

## Pre-MOR File Inspection

- Review all move in and move out files and check each for
  - Make sure all forms are signed, dated, and in order
  - A good resource is a checklist in each file
    - Checklist should note all sources for documents in the file
      - Ex. Income verifications, asset verifications, etc.
    - Minimum of 2 staff signatures on all checklists
- Make sure all Policies are up to date
  - AFHMP
  - Income Limits and Rents are correct
  - Year end reports are complete
  - House Rules and TSP
- Forward current rent roll and list of move-ins since last review at least 5 days in advance of the scheduled MOR.
- Have all resident files available, move out files, and rejection files
- Be sure Fair Housing posters are up to date and posted appropriately
- Files should be stored/located in a secure location

## FILE CHECK LIST

TENANT \_\_\_\_\_ Unit \_\_\_\_\_

- |  |           |              |  |
|--|-----------|--------------|--|
| <input type="checkbox"/> Sheet for separation of each year.....  | Yes _____ | Needed _____ |  |
| <input type="checkbox"/> Certification Summary Sheet.....  | Yes _____ | Needed _____ |  |
| <input type="checkbox"/> Tenant Income Certification . . . . .   | Yes _____ | Needed _____ |  |
| <input type="checkbox"/> Notification of Rent Increase.....  | Yes _____ | Needed _____ |  |
| <input type="checkbox"/> Model Lease Agreement (moved from prior year).....  | Yes _____ | Needed _____ |  |
| <input type="checkbox"/> Questionnaire.....  | Yes _____ | Needed _____ |  |
| <input type="checkbox"/> Social Security/Railroad Income Verifications.....  | Yes _____ | Needed _____ |  |
| <input type="checkbox"/> Pension Income Verification.....  | Yes _____ | Needed _____ |  |
| <input type="checkbox"/> Asset Income Verifications.....   | Yes _____ | Needed _____ |  |
| <input type="checkbox"/> 9887A Form.....   | Yes _____ | Needed _____ |  |
| <input type="checkbox"/> Disposal of Asset Form.....   | Yes _____ | Needed _____ |  |
| <input type="checkbox"/> Ethnicity Form (moved from prior year) . . . . .  | Yes _____ | Needed _____ |  |
| <input type="checkbox"/> Family Summary Sheet/Citizenship (moved from prior year) ....   | Yes _____ | Needed _____ |  |
| <input type="checkbox"/> Pet Policy (moved from prior year) . . . . .  | Yes _____ | Needed _____ |  |
| <input type="checkbox"/> Sex Offender Visual Inspection Document . . . . .   | Yes _____ | Needed _____ |  |
| <input type="checkbox"/> Record of Visual Inspection of Documents (in move in file) .....  | Yes _____ | Needed _____ |  |
| <input type="checkbox"/> HUD Fraud Form.....   | Yes _____ | Needed _____ |  |
| <input type="checkbox"/> Inspection report annually . . . . .  | Yes _____ | Needed _____ |  |
| <input type="checkbox"/> HOME Survey Form . . . . .  | Yes _____ | Needed _____ |  |
| <input type="checkbox"/> Supplemental & Optional Contact Information<br>(Form #92006 to be attached to original app in move-in file) ... | Yes _____ | Needed _____ |  |

DATE COMPLETED \_\_\_\_\_ DATE CHECKED \_\_\_\_\_

EMPLOYEE INITIALS \_\_\_\_\_ MANAGER'S INITIALS \_\_\_\_\_

Sample File Checklist

# Preparing for a MOR

## Office Preparation

**The following Items should be readily available for inspection during the MOR:**

- ✓ All new move-in resident files including resident certification forms and all supporting documents
- ✓ List of vacant units by unit size and date units were vacated
- ✓ Copy of the rent roll
- ✓ Current waiting list
- ✓ Last advertisement and/or copies of apartment brochures
- ✓ Copy of application
- ✓ Copy of lease and lease addenda
- ✓ Copy of pet policy
- ✓ Copy of applicant rejection letter
- ✓ Annual unit inspections
- ✓ Management Agreement
- ✓ Resident Selection Plan
- ✓ Affirmative Fair Housing Marketing Plan
- ✓ Lease
- ✓ House rules with any updates should be available for review
- ✓ Copy of the most recent, signed Owner's Certificate of Continuing Program Compliance and the PennHOMES Annual Reports
- ✓ Rejection letter
- ✓ List of current staff billed to the property and their positions
- ✓ List of any reasonable accommodations made since last review
- ✓ List of residents who are currently under eviction
- ✓ List of fees that are charged to the residents (not including rent)
- ✓ A listing of trainings/seminars and dates attended since last management review

# Effective Communication

## Resident Communication

- Provide Details- Leaving loose ends open items up to interpretation which can lead to confusion
- Communicate in many methods when possible- TV, elevator notices, written letters, announcements, etc.
- Be Flexible- sometimes accommodations are needed.
- Hold floor meetings for large projects or important topics.
- Allow for feedback- Residents will have questions and concerns which are good to help with the planning process especially on large projects.

# Effective Communication

## Notices

- Should be in writing when possible
- Should also provide details
- Notices should be in larger font for visually impaired individuals.

## Communication with PHFA

- Build a rapport with Technical Services Representative and Housing Management Representative.
- Ask questions-if you're unsure of a policy or procedure ask

# Thank You!

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