**SUMMARY REPORT**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Date of On-Site Review: | Date of Report: | Project Number: | | Contract Number: |
| Section of the Act:  Section 8 | Name of Owner: | Project Name: | | Project Address:  , |
| Loan Status:  Insured  HUD-Held  Non-Insured  Co-Insured | Contract Administrator:  HUD  CA  PBCA | Type of Subsidy | | Type of Housing |
| Section 8  PAC  Section 236  Section 221(d)(3) BMIR | Rent Supplement  RAP  PRAC  Unsubsidized | Family  Disabled  Elderly  Elderly/Disabled  Other (please specify) |

For each applicable category, assess the overall performance by checking the appropriate column. Indicate A (Acceptable) or C (Corrective action required). Include target completion dates (TCD) for all corrective action items. For those items not applicable, place N/A in the TCD column.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **A. General Appearance and Security** | A | **C** | **TCD** | **General Appearance and Security Rating**  Superior  Above Average  Satisfactory  Below Average  Unsatisfactory Not Rated |
| 1. General Appearance |  |  |  |
| 2. Security |  |  |  |
| **B. Follow-up and Monitoring of Project Inspections** | A | **C** | **TCD** | **Follow-up and Monitoring of Project Inspections Rating**  Superior  Above Average  Satisfactory  Below Average  Unsatisfactory Not Rated |
| 3. Follow-Up and Monitoring of Last Physical Inspection and Observations |  |  |  |
| 4. Follow-Up and Monitoring of Lead-Based Paint Inspection |  |  |  |
| **C. Maintenance and Standard Operating Procedures** | A | **C** | **TCD** | **Maintenance and Standard Operating Procedures Rating**  Superior  Above Average  Satisfactory  Below Average  Unsatisfactory Not Rated |
| 5. Maintenance |  |  |  |
| 6. Vacancy and Turnover |  |  |  |
| 7. Energy Conservation |  |  |  |
| **D. Financial Management/Procurement** | A | **C** | **TCD** | **Financial Management/Procurement Rating**  Superior  Above Average  Satisfactory  Below Average  Unsatisfactory Not Rated |
| 8. Budget Management |  |  |  |
| 9. Cash Controls |  |  |  |
| 10. Cost Controls |  |  |  |
| 11. Procurement Controls |  |  |  |
| 12. Accounts Receivable/Payable |  |  |  |
| 13. Accounting and Bookkeeping |  |  |  |
| **E. Leasing and Occupancy** | A | **C** | **TCD** | **Leasing and Occupancy Rating**  Superior  Above Average  Satisfactory  Below Average  Unsatisfactory Not Rated |
| 14. Application Processing/ Tenant Selection |  |  |  |
| 15. Leases and Deposits |  |  |  |
| 16. Eviction/Termination of Assistance Procedures |  |  |  |
| 17. Tenant Rental Assistance Certification System (TRACS) Monitoring and Compliance |  |  |  |
| 18. Tenant File Security |  |  |  |
| 19. Summary of Tenant File Review |  |  |  |
| **F. Tenant/Management Relations** | A | **C** | **TCD** | **Tenant Services Rating**  Superior  Above Average  Satisfactory  Below Average  Unsatisfactory Not Rated |
| 20. Tenant Grievances |  |  |  |
| 21. Provision of Tenant Services |  |  |  |
| **G. General Management Practices** | A | **C** | **TCD** | **General Management Practices Rating**  Superior  Above Average  Satisfactory  Below Average  Unsatisfactory Not Rated |
| 22. General Management Operations |  |  |  |
| 23. Owner/Agent Participation |  |  |  |
| 24. Staffing and Personnel Practices |  |  |  |
| **Overall Rating:**  Superior  Above Average  Satisfactory  Below Average  Unsatisfactory | | | | |

|  |  |
| --- | --- |
| Name and Title of Person Preparing this Report: (Please type or print):  , | Name and Title of Person Approving this Report: (Please type or print):  , |
| Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Date: | Signature:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Date: |

**NOTE: If this review is conducted by a CA or PBCA as indicated above, the overall rating reflects a review as it relates to compliance with the Housing Assistance Payment Contract (HAP) only.**