

Comparison of 2019 and 2020 Evaluation Guidance for the Duty to Serve Program

Red box indicates guidance that applies for the 2021 Plan year.

2019 Evaluation Guidance	2020 Evaluation Guidance
Plan Development and Non-Objection	
Strategic priorities statement required (<i>for purposes of the 2021 Plan year, FHFA considers this requirement to be satisfied</i>)	No required strategic priorities statement
Average concept score of 30 over 3-year Plan period	Minimum concept score of 30 over 3-year Plan period
Minimum number of activities with loan purchase objectives in year 3 for Non-Objection: MH: 2, RH: 2, AHP: 5	Minimum number of activities with loan purchase objectives in year 1 for Non-Objection: MH:2, RH: 3, AHP: 6
Wide-ranging, compound objectives	Targeted objectives
Step One Evaluation	
Completion of implementation steps and target considered in Step One evaluation	Only target considered in Step One evaluation
Multiple partial credit scores in Step One evaluation	Simplified partial credit scores in Step One evaluation
No partial credit in Step One for incomplete objectives without a baseline	Partial credit in Step One for incomplete objectives without a baseline
Compliance threshold: 7	Compliance threshold: 8
Step Two Evaluation (<i>guidance is the same in the 2019 and 2020 versions</i>)	
Impact scores of 10, 20, 30, 40, or 50 based on direct impact or future impact	If the impact score exceeds the concept score, the impact score is averaged with the concept score
Extra Credit and Ratings	
Extra credit adjustment up to 15%	Extra credit adjustment of 5%
Cumulative impact score of 70 required for extra credit, excluding scores of 10	Cumulative impact score of 80 required for extra credit, excluding scores of 10 or 20
One MH activity eligible for extra credit (chattel)	Two MH activities eligible for extra credit (chattel and comm/govt)
Ratings: Minimally Passing/Low Satisfactory/High Satisfactory /Exceeds	Ratings: Complies, needs improvement/Complies, acceptable/Complies, excellent results