

Housing New Mexico MFA

Coordinating for Success:
Strategies for Service Alignment
and Long-Term Housing Retention

Amanda Mottershead-Aragon -
Assistant Director, AMD



Asset Management Team Introductions

Department Staff:

Patrick Ortiz – Director

Amanda Aragon – Assistant Director

Samantha Vigil – Supervisor

Carmela Arellano – Program Coordinator

Carol Salazar – Program Specialist

Angie Martinez – Program Analyst

Veronica Soto – Program Analyst

Brenda Morga – Program Analyst

Danny Araujo – Program Analyst

Arely Contreras – Program Analyst



Back row (left to right): Patrick Ortiz, Angie Martinez, Brenda Morga, Carol Salazar, Amanda Aragon, Danny Araujo

Front row (left to right): Veronica Soto, Arely Contreras, Samantha Vigil, Carmela Arellano

Asset Management Mission

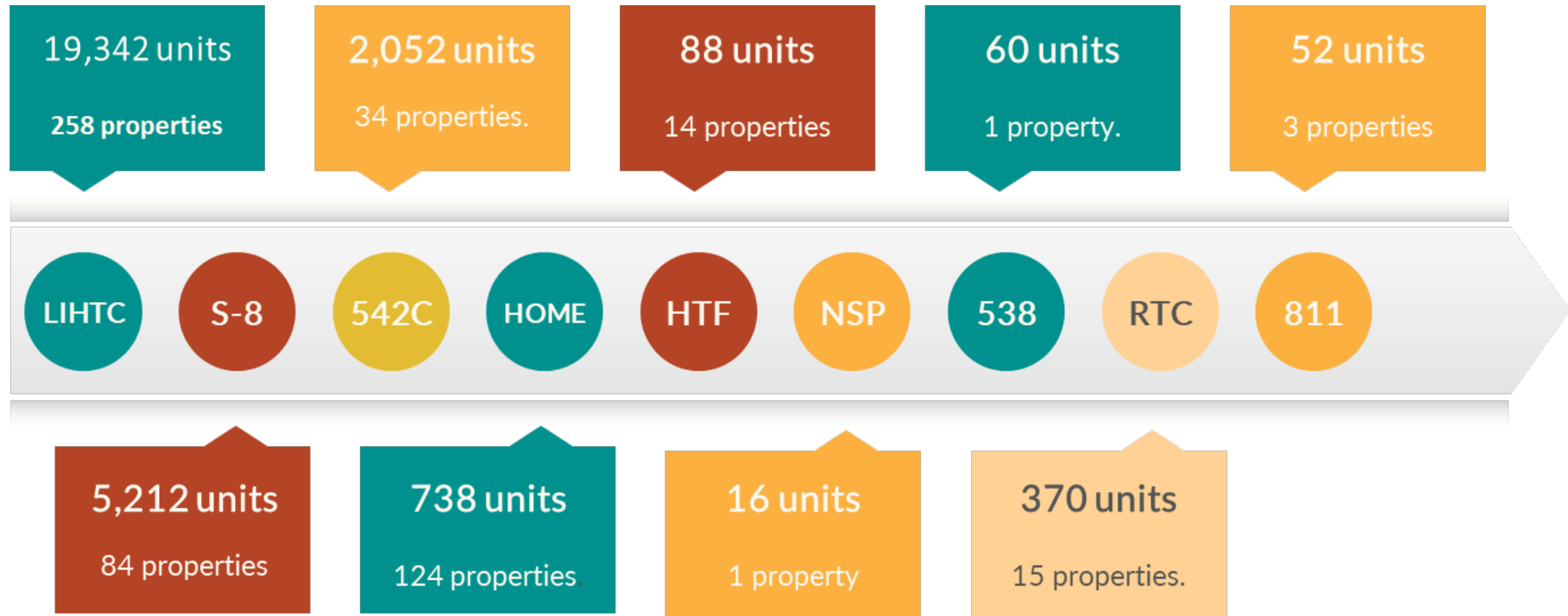
PAHA Homes, 30 Affordable Units (Acoma)



Provide education, support and collaboration with partners of apartment communities in our portfolio ensuring program compliance and decent, safe and sanitary communities for our residents.

Asset Management Overview

- Housing New Mexico's Asset Management department is responsible for compliance audits and physical site inspections for more than 300 properties totaling over 19,000 units throughout New Mexico.
- Asset Management is committed to working with and providing training to property owners, management agents and property managers, to ensure the successful operation of properties.



Asset Management Overview



Physical Inspection Deficiency:
damaged blinds



Exigent Health and Safety:
cracked plate/exposed wires



Physical Inspection Deficiency:
damaged window screen

The Asset Management Department performs long-term compliance monitoring for a wide range of housing programs. Our monitoring functions include:

- the physical inspection of properties
- tenant file audit and compliance review
- compliance auditing of property operations
- financial analysis of the property as a sustainable asset
- approving Affirmative Fair Housing Marketing Plans (AFHMPs)
- approving Reserve for Replacement requests
- providing semi-annual and annual reports to HUD, USDA, and the IRS
- receives base fees for monitoring

Asset Management Overview



Since 2000, Asset Management has administered the contract with U.S. Department of Housing and Urban Development (HUD) as Contract Administrators for the Project Based Section 8 portfolio in New Mexico.

- The contract tasks include performance of these administrative functions:
 - Management & Occupancy Reviews
 - Maintaining and renewing Housing Assistance Payment contracts (HAP) between property owners and HUD
 - Reviewing and approving rent amounts for Section 8 units
 - Verification of HUD's subsidy (HAP) to Section 8 units against claims for subsidy from the owner
 - Communication with residents who occupy Section 8 properties to ensure the health and safety of HUD's Section 8 portfolio is being maintained
- At present, our contract with HUD includes 84 Section 8 properties throughout the state which are comprised of multifamily properties for seniors, families, group homes, and persons with disabilities.

Left to right: Veronica Soto, Patrick Ortiz, Arely Contreras, Brenda Morga, Carmela Arellano, Danny Araujo, Samantha Vigil

Asset Management Service Coordinator Compliance

Casitas de Colores, 49 Affordable Units (Albuquerque)



The Asset Management Department reviews Service Coordination compliance for the following programs:

- Low Income Housing Tax Credit (LIHTC)
- Project Based Section 8

Tax Credit Requirements

In 2018 the option to include a Service Coordinator as part of the scoring for Special Services and Enrichments for LIHTC properties, began.

Currently, Permanent Supportive Housing (PSH) Projects electing to include Service Coordination as part of their application for Tax Credits, must meet the following requirements from the Qualified Allocation Plan (QAP):

- A minimum of four hours per week of onsite Service Coordination for properties up to 20 Units, with an additional one hour per week for every five Units over 20.
- Service coordinator must be in addition to the property management site staff.
- Adequate space to meet with residents that provides for confidential conversations and maintenance of secure records.
- Access to telephone and internet services when meeting with residents for the purpose of coordinating services. Use of a smart phone and tablet is acceptable.
- Meeting with residents requiring services within 60 days of move-in and semi-annually thereafter.



Tax Credit Requirements

Coordinated Services Requirement

- Coordination of at least two services/programs to be offered on a monthly or quarterly basis, onsite, online, or in close proximity to the Project
- Services must be provided to residents at little or no cost. Services must be optional.
- Under the current QAP requirements, services may not be provided by property management staff. In limited circumstances some services may be provided by the service coordinator.



Tax Credit Requirements

Coordinated Services

Appropriate services will do one or more of the following:

- Increase resident knowledge of and access to available services
- Help residents maintain stability and avoid eviction
- Build life skills
- Increase household income and assets
- Increase health and wellbeing
- Improve educational success of children and youth

Examples

- Literacy/language training
- Personal safety
- Financial
- Income and asset building
- Life skills



Tax Credit Requirements



Resident Annual Survey

Servicer Coordinators must, conduct an annual survey regarding need for and satisfaction or dissatisfaction with the service coordination, including coordinated services.

Tax Credit Requirements

MFA Reporting Requirements

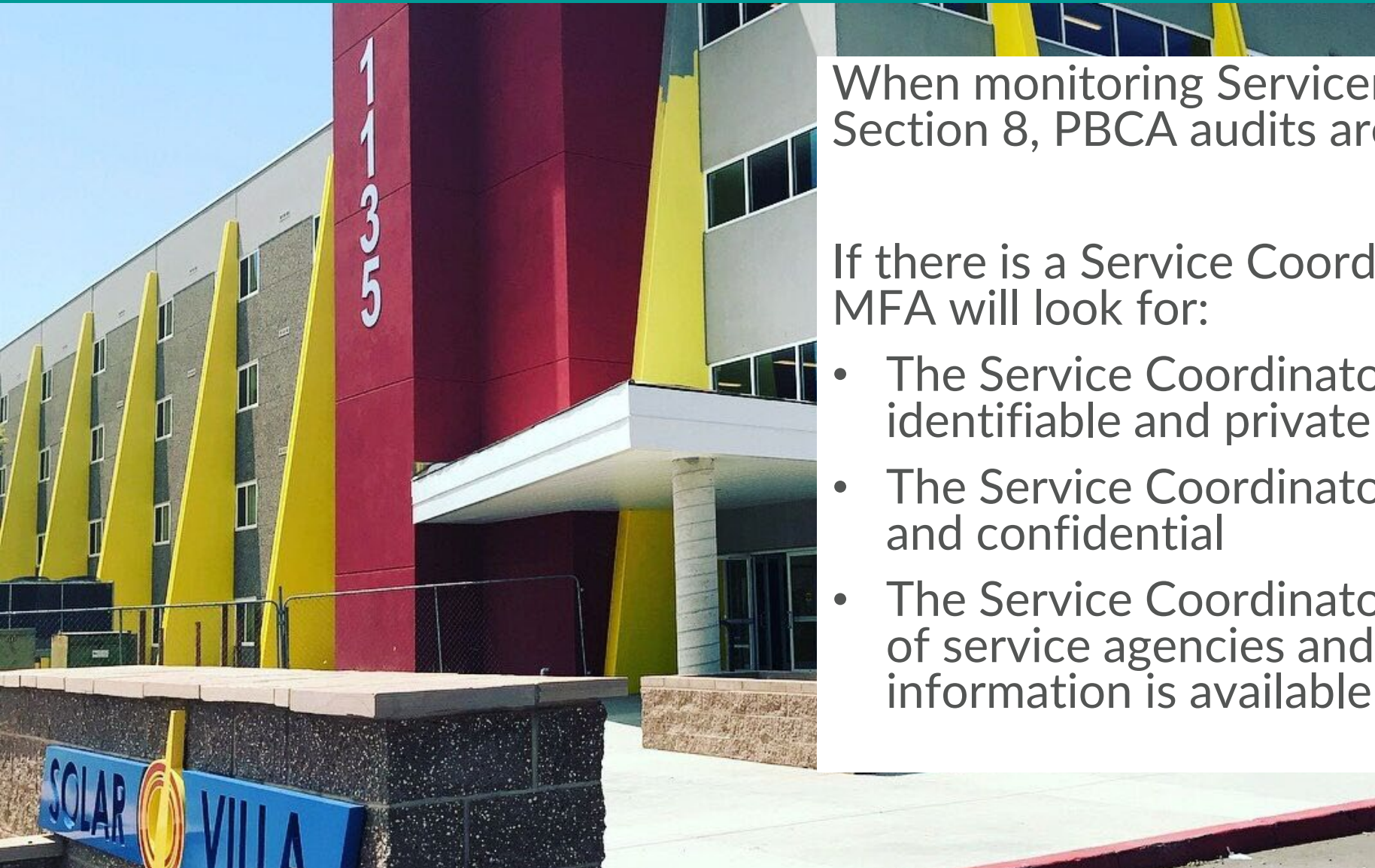
- This housing priority requirement will be enforced through a provision in the Land Use Restriction Agreement (LURA) and QAP for the year the project was placed in service.
- Services must be provided throughout the Affordability Period and must not allow for more than a 30-day gap in service.
- All documentation must be easily auditable for compliance.
- The Project will be determined out of compliance if the requirements of the LURA are not met

Tax Credit Requirements

Reporting Requirements

1. Project Owners will be required to submit an annual certification of:
 - The number of hours of onsite Service Coordination and coordinated services provided,
 - The number of residents served by each, and
 - The results of the annual survey.
2. Project Owners will be responsible for ensuring that property managers maintain:
 - Agreement for services on file, if any,
 - Evidence that the services are being provided (i.e. sign-in sheets, letters/memos to residents advertising the event/service, service logbook and/or activity reports, etc.), and
 - Evidence of efforts taken to market and attract Special Housing Needs applicants (i.e. proof/copies of advertisements, evidence of outreach to organizations/non-profits working with Special Housing Needs populations, etc.).

Section 8 Requirements



When monitoring Servicer Coordinators for Section 8, PBCA audits are limited.

If there is a Service Coordinator for the project, MFA will look for:

- The Service Coordinators office is clearly identifiable and private
- The Service Coordinators files are kept secure and confidential
- The Service Coordinator maintains a directory of service agencies and contacts and that the information is available to all parties.

Questions?

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We Are Housing New Mexico