4 Steps to a Successful MOR
Who Am I

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17 years experience in subsidized housing- 12 of those on the management side of the MOR, and 5 with NTHDC.
Who is NTHDC? Who is CGI Federal?

• In 2004, the U.S. Department of Housing and Urban Development announced its award for Performance-Based Contract Administration for the Project-based Section 8 program for the State of Florida to North Tampa Housing Development Corporation (a non-profit entity of the Tampa Housing Authority).

• Under the terms of the award, North Tampa Housing Development Corporation (NTHDC) entered into a partnership agreement with CGI to establish and manage the performance-based Section 8 contract administration initiative.
Session Agenda

- Know your MOR Report Form 9834
- Be Informed and Prepared
- Self Audit
- Expand Your Knowledge
STEP ONE

Know Your MOR Form 9834

North Tampa Housing Development Corporation
Step One- Know your 9834

Part A- General Appearance and Security

• General Appearance- What do YOU see?
  • Are the grounds, parking lots, buildings, breezeways, etc… in good condition, clean and free of damage? Is there attractive landscaping?
  • Can you tell the difference between your property and a market property?

• Security- Are you monitoring regularly and documenting follow up of activity occurring on the property?
Step One- Know your 9834

Part B- Follow-up and Monitoring of Project Inspections

• REAC follow-up- Have you reviewed your REAC from the past 12 months and made certain ALL items are complete?

• Lead Based Paint- Do you have LBP? Have a copy of your inspection? Are you aware of the requirements and following/documenting your Lead Hazard Control Plan (LHCP)?
Part C- Maintenance and Standard Operating Procedures

• Maintenance- Have past work orders and open work orders (with explanations) ready for review.

• Vacancy & Turnover- Are you tracking the number of days from MO until unit is ready for occupancy? Tracking MO to MI? Less than 30 days?

• Energy Conservation- What are you doing to promote energy conservation?
Step One- Know your 9834

Part E- Leasing and Occupancy

• Have you reviewed your Application, Tenant Selection Plan, House Rules, Pet Rules, Lease, etc… to ensure they are up to date and reference the required information?

• Are your files, waiting lists, and/or documents in order and being maintained properly?

• Are your waiting lists detailed, in order, and being maintained properly?
Step One- Know your 9834

Part F- Tenant/Management Relations

• Do you have sufficient grievance procedures and appeal processes in place?

• Do you provide Tenant Services, a Service Coordinator, a Neighborhood Network Center? If not, do you provide the residents with information about services in the area that may meet their needs?

• Do you encourage (and document) tenant involvement in project operations?
Step One- Know your 9834

Part G- General Management Practices

• Have you documented and followed up on all complaints with NTHDC, HUD, Fair Housing?

• How do you implement HUD changes in policies and procedures- home office, on-site?

• Training in place?

• Are EIV procedures sufficient as required and are they being followed?
STEP TWO

Be Informed and Prepared

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Step Two - Be Informed and Prepared

Know what the program type is and what regulations apply

Know the program specific requirements for the property:

- Lease and Lease requirements
- Security deposit amount required
- Income limits (pre & post 81 universe)
- Preferences required
- Clientele/population to be served
- Specific definitions for program type
Step Two- Be Informed and Prepared

Controlling Documents
• Know where your controlling documents are (Original HAP, etc…) and know what they say and/or require. Have them available.

Gather Documents on Addendum C

Obtain completed Addendum B
Step Two- Be Informed and Prepared

Prepare a MOR Binder

• Can assemble in order of 1.) the Addendum C list of documents or 2.) in the order of the Form 9834.

• Permanent/Semi-permanent Documents can be added once and then updated as needed.

• This will cut the preparation time and organize documents for easy retrieval and review during the MOR.
STEP THREE

Self Audit

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Review Policies & Procedures

• Review documents in place.
  • Read your Tenant Selection Plan, Applications, forms, etc.. to ensure they reflect your current operating policies and procedures.
  • Review EIV Policies, Procedures and Reports.
• Ensure site and staff have been properly trained and that site practices match the established procedures in place.
File Review

• Set up a schedule to review certification files on a regular basis.

• Use the MOR Form 9834 Tenant File Worksheet (Addendum A) as a tool/guideline.

• Utilize the NTHDC presentations and training handouts like the Addendum A worksheet that has detailed notes about what to look for in each section. This was recently used at NTHDC trainings.
STEP FOUR

*Expand Your Knowledge*

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Step Four - Expand Your Knowledge

Stay Informed of News and Updates as they are issued:

- RHIIP Listserv at: http://www.hud.gov/subscribe/mailinglist.cfm

- Local Multifamily HUD field Office at: http://www.hud.gov/subscribe/localmailinglist.cfm#fl

- NTHDC Newsletters and Discussion Forums
NTHDC is Excited to Announce the Launch of Our New and Improved Website

Features Include:
- Interactive Questions and Answers
- Announcement Section for Up to Date Changes in HUD Policy.
- RSS Feeds
- Discussion Forum
- Regulatory Center
- HUD Policy Documents and Forms
- Upcoming Events
- Access to Industry Presentations

http://NTHDC.org
Step Four- Expand Your Knowledge

Attend Training

• Utilize SAHMA, FAHSA, NTHDC, HUD webcasts, etc… whenever available.

ASK QUESTIONS

• If you don’t know, are not sure, or just want to confirm you knew the answer all along, ask!

• Use your email.
• Use your telephone.
• Talk to each other.
Questions???
Supplement to Presentation

ADDENDUM A

TENANT FILE WORKSHEET

NTHDC Training Document

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