

Compliance Specialist – Tina Esther

Primarily responsible for ensuring those owners/management agents perform at levels acceptable to the State while maintaining industry contacts and interactions that foster a positive working relationship with affordable housing partners and customers. Responsibilities include but are not limited to:

- a. Prepare reconveyance and release documents for projects which have paid in full.
- b. Process monthly vacancy report for all Department projects with loans
- c. **C**oordinate and evaluate the receipt of the Annual Certification of Continuing Compliance for all Department funding programs. Provide partners with Management Agent and Resident Services Plan when necessary
- d. Monitor projects with limited Department resources such as Trust Fund only.

Financial Review Analyst – Phil Richards

The primary purpose of this position includes but is not limited to:

- a. To review, analyze and evaluate audited financial statements for all projects with Department loans. To insure that project operations are in compliance with the restrictive documentation agreed to at closing in accordance with State and Federal regulations.
- b. This position represents the Department in dealing with Management Agents, Sponsors, Housing Agencies, CPAs and auditors.
- c. It participates in the cash management of projects by overseeing, regulating, and authorizing or disapproving various payments and distributions of project income and assets.

ARRA Asset Manager – John Cieri

The Asset Manager is the primary contact and consultant for ensuring the financial stability of the projects funded under the American Recovery and Reinvestment Act of 2009 (ARRA). ARRA is a program established by the Federal Government in an effort to combat the recession, stimulate the economy and begin systemic reinvestment in the nation's physical and economic infrastructure. Responsible for the development and implementation of long range financial goals, objectives and regulations for the financial success of the Department's projects awarded ARRA funds.

- a. To collaborate with Department and sponsor teams during pre-development and development of multiunit housing.
- b. Annually, prepare a business plan identifying strategies, financial goals, and a five year plan for the property. The plan includes the budget, capital expenditure expectations, strategic recommendation(s), and disposition strategies,
- c. Responsible for the preservation and protection of assets through analysis and developing recommendations for an assigned portfolio of properties.

Portfolio Risk Analyst – John Skelton

The purpose of this position is to act as primary contact and consultant for the agency's investment portfolios in the Asset Performance Section. Primary Responsibilities include:

- a. Administrates the Annual Income and Expense program (AIE) database. **(link to Annual AIES Report)**
- b. Prepare analysis and recommend action for higher risk projects that may affect stakeholders, local government, community, and private sector businesses
- c. Develop, identify, collect and analyze statewide and target area trends in the area of economics, employment trends, and shifts in population.
- d. Direct, coordinate, and lead work groups dealing with high risk properties to gain acceptable goals and resolution on subjects such as operations procedures or strategies for assisting poorly performing portfolio projects. Stakeholders groups may include, but not limited to: internal staff, equity investors, owners, non-profit organizations, management agents, lenders, legal advisors, and other governmental agencies, both State and Federal.

Verna Rutledge – Office Specialist – HUD's Annual Contributions Contract

The purpose of this position is to administer quality assurance policies and procedures to ensure consistent, accurate, and timely performance and reporting of Incentive Based Performance Standards as outlined in the Annual Contributions Contract, and assure Acceptable Quality Levels are met or exceeded to ensure Department receives maximum fee possible.

- a. Assists Quality Assurance Advisors and Contract Officers to ensure Incentive Based Performance Standards are performed.
- b. Management and Occupancy Reviews
- c. Life and Non-life Threatening Health and Safety Issues
- d. REAC Exigent Health and Safety Findings: Reviews REAC inspections for exigent health and safety findings. If findings are noted in the report, confers with the owner and management agent to ensure findings are certified mitigated within 72 hours. Ensures required data is entered into the HUD Secure System and Work plan.

Richard Arias – Office Specialist – HUD’s Annual Contributions Contract

The purpose of this position is to administer quality assurance policies and procedures to ensure consistent, accurate, and timely performance and reporting of Incentive Based Performance Standards as outlined in the Annual Contributions Contract, and assure Acceptable Quality Levels are met or exceeded to ensure Department receives maximum fee possible.

- a. Assists Contract Officers with Management and Occupancy/Fair Housing and Equal Opportunity (FHEO) Reviews
- b. Life and Non-life Threatening Health & Safety Issues
- c. Contract Renewals and Rent Adjustments correspondence
- d. Prepares, processes and follows up on contract renewal and rent adjustment

James Wilson – Office Specialist for Division

This position provides secretarial support for the Asset and Property Management Division. Responsibilities includes responding to general questions from the public about affordable housing, and maintaining the accuracy of the Division database and permanent records,

- a. Answer specific program questions for the public
- b. Invoice and monitor the payment of the LIHTC and Conduit Administration/monitoring fees
- c. Division Archivist
- d. Monitors Replacement Reserves and project Insurance for all Department loans

Dawn Voelker – Manager

The purpose of this position is to manage the Asset Performance Section and serve as a member of the Division’s management team. The manager provides oversight of the Asset Performance Section which involves recruitment, hiring, training and performance management of a high level team. Responsibilities include:

- a. Developing collaborations with HUD (Housing and Urban Development), Rural Development, Internal Revenue Service, private developers and the many community development agencies
- b. Interpreting and applying regulations to Department projects as applicable. Collaborate with partners and analyze financial information to insure the project meets the financial and regulatory requirements.
- c. Oversee the formulation, design and implementation of a plan to assist our partners achieve success or decide if the Department must take further steps to insure that the Department funds and those of the Citizen’s of Oregon are secure.
- d. This position evaluates and proposes procedural or programmatic changes for implementation to enhance the efficiency and effectiveness of internal operation between divisions with emphases on operations with the Housing Division, Financial Operations and Community Services.