



Blended Occupancy Specialist (BOS)

Navigate complex compliance challenges like a pro. The advanced training that sets the standard for those involved with properties receiving multiple subsidies – don't settle for anything less.

Blended Occupancy Specialist (BOS) is a comprehensive study of the compliance challenges posed by “blended” sites – those properties receiving subsidies from multiple sources and/or financed through multiple programs. BOS focuses on where the rules overlap, where they differ, and how to steer a compliant path through it all.

BOS is geared toward owners, agents, regional managers, supervisors, property and site managers and others who operate properties with any combination of HUD project-based assistance, the Low-Income Housing Tax Credit (LIHTC) program, and/or HOME investment.

Please note: The certification exam for this course is administered in the classroom on the third day.

What you will learn:

An overview of the blended program

- Receive a thorough overview of the basic mechanics of all three programs and an introduction to the Compliance and Management Matrix. Learn about program design and administration, affordability periods, source of funds, eligibility requirements and key compliance documents in a blended context.

Preparing for and renting the units – beware of the compliance gaps.

- HUD, Tax Credit, and HOME rules are not always complementary of each other, threatening to create compliance gaps and eligibility discrepancies. Learn how to manage your way through these difficulties by delving into issues such as Fair Housing law, tenant selection plans, leases, determining household income, making student eligibility determinations, conducting proper verifications, and setting rents between the programs.

Managing the unit mix and maintaining compliance

- Learn the nuances of ongoing eligibility including annual and interim recertification requirements, HUD's Enterprise Income Verification (EIV) requirements, and how to deal with household status changes after initial certification.

With BOS, you will also know what to expect when your blended property is audited by multiple regulatory entities and how to respond to findings professionally.

Regardless of the program type, being out of compliance can cost time and money. By the conclusion of this course, you will have the compliance strategy skills needed to successfully save both at their blended properties.

Special note – a Prerequisite is Necessary

BOS is an advanced course that focuses on the management of multiple compliance-related functions. For this reason, COS or TCS certification or its equivalent is required for registration.

COURSE PROFILE

Duration: Three days

Exam: Includes half-day in-classroom certification exam

Format: Lecture with multimedia presentation, group exercises and discussion

Prerequisites: Tax Credit Specialist (TCS), Certified Occupancy Specialist (COS), or equivalent

Audience: Those with properties impacted by HUD, LIHTC, and/or HOME regulations

Provided: Course Materials

Bring: Calculator and pencil (required); highlighter, sticky notes (recommended)

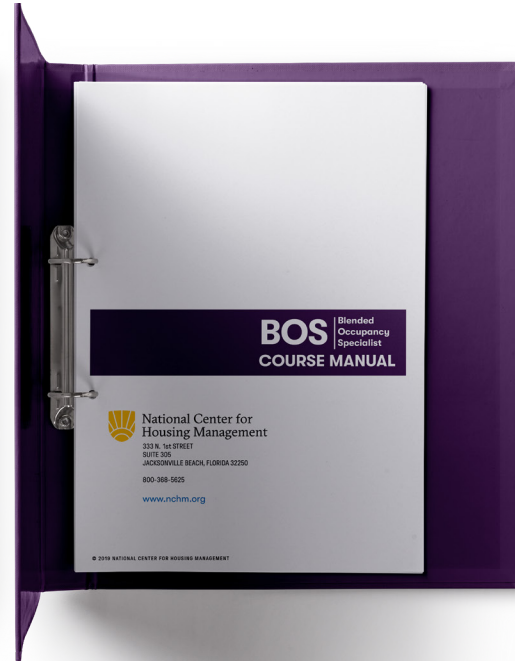
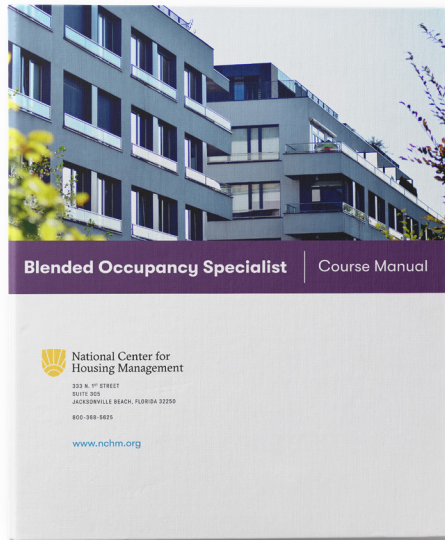


Program dates/registration
visit nchm.org or call 800-368-5625



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COURSE MATERIALS



- Course Manual (above), NCHM Exercises and Quizzes, Related HUD forms and 4350.3 guidance, Related IRS forms and guidance, Related HOME guidance
- BOS Course Presentation
- Handouts
- Blended Property Matrix

COURSE AGENDA

DAY
1

8:00am-5:00pm

- Introduction
- Laying the Groundwork
- Preparing the Way
- Qualifying the Tenants

DAY
2

8:00am-5:00pm

- Qualifying the Tenants (cont.)
- Managing the Mix
- Maintaining Compliance

DAY
3

8:00am-1:00pm

- Maintaining Compliance (cont.)
- Final Review
- Exam