

STATE OF OHIO (DAS) CLASSIFICATION SPECIFICATION	<b><u>CLASSIFICATION SERIES</u></b> Housing Examiner	<b><u>SERIES NUMBER</u></b> 6735
	<b><u>MAJOR AGENCIES</u></b> Ohio Housing Finance Agency only	<b><u>EFFECTIVE</u></b> 03/28/2010

**SERIES PURPOSE**

The purpose of the housing examiner occupation is to monitor government subsidized housing projects in the field for compliance with government regulations.

At the developmental level, incumbents assist housing examiners in order to develop understanding & proficiencies in examining & monitoring government subsidized housing projects &/or tax credit projects.

At the full performance level, incumbents independently conduct financial, operational & compliance review site inspections to ensure adherence to government housing regulations & oversee multiple funding programs.

<b><u>JOB TITLE</u></b>	<b><u>JOB CODE</u></b>	<b><u>PAY GRADE</u></b>	<b><u>EFFECTIVE</u></b>
Housing Examiner Trainee	67351	28	03/28/2010

**CLASS CONCEPT**

The developmental level class works under immediate supervision & requires some knowledge of accounting in order to develop understanding & proficiency in examining & monitoring government subsidized housing projects &/or tax credit projects by receiving training & assisting housing examiners in compliance activities.

<b><u>JOB TITLE</u></b>	<b><u>JOB CODE</u></b>	<b><u>PAY GRADE</u></b>	<b><u>EFFECTIVE</u></b>
Housing Examiner	67352	31	03/28/2010

**CLASS CONCEPT**

The full performance level class works under general direction & requires considerable knowledge of accounting & government subsidized housing projects, tax credit programs & related rules & regulations in order to conduct financial, operational & compliance review site inspections to ensure adherence to government housing regulations & oversee multiple funding programs.

<b>JOB TITLE</b>	<b>JOB CODE</b>	<b>B. U.</b>	<b>EFFECTIVE</b>	<b>PAY GRADE</b>
Housing Examiner Trainee	67351	14	03/28/2010	28

**JOB DUTIES IN ORDER OF IMPORTANCE (These duties are illustrative only. Incumbents may perform some or all of these duties or other job-related duties as assigned.)**

Develops understanding & proficiency in examining & monitoring government subsidized housing projects &/or tax credit projects by receiving training (i.e., participates in activities designed to receive instruction in examination/analysis of required documentation to comply with government subsidized housing regulations & tax credit programs) & assisting housing examiners in compliance activities (i.e., assists housing examiners in examination & review of Section 8 tenant certifications &/or tax credit tenant income certifications along with supporting documents & rent records & housing assistance payments for accuracy, completeness & legitimacy, assists in organizing examination notes & analyzing documents/records; evaluates financial data, determines annual adjustment factor & computes annual rent increases; evaluates project expenditures (e.g. taxes, insurance, utilities) to determine need of additional subsidy & calculates special rent increases; analyzes consumption data (e.g., gas, electric, water) for resident paid utilities to determine utility allowance for each unit size within a project; reviews government accounting data (e.g., financial statements, balance sheets, statement of profit & loss, source & disposition of funds, cash surplus statement, auditor summary) & compiles into computer for spreadsheet analysis in calculation of rent increase; writes projected funding requirements for projects, monitors use of funds & identifies shortfalls requiring revision of budget; travels to projects & assists housing examiners to conduct interior & exterior physical inspections of occupied subsidized multifamily projects & evaluates overall performance of building owners/managers regarding occupancy requirements, subsidy of fund controls, environmental controls, administration & maintenance; conducts site inspections of projects for curb appeal, routine maintenance & general overall appearance; plans & schedules site visits, advises building owners/managers, general public & government officials on complex occupancy matters such as admissions, income limits, rent determinations, family income certification, grievance procedures &/or fair housing; develops training guide materials for building owners/managers & agency staff on government & agency policies) .

Assists housing examiners with preparation & maintenance of variety of fiscal &/or budgetary reports, records, studies &/or correspondence (e.g., fiscal accounting reports, payroll projections, budget outlay projections, quarterly & annual financial reports, analysis of division expense for budgetary needs progress reports, funding information).

Maintains subsidized housing files & tax credit compliance files (e.g., account balances, active/inactive tenant certification, periodic review, rent increase, budget contract) for projects; reviews, processes & makes recommendations regarding variety of property owner requests (e.g., qualified contracts, ownership changes & management company approvals); attends housing industry seminars or meetings.

**MAJOR WORKER CHARACTERISTICS**

Knowledge of accounting; subsidized housing projects & tax credit project policies & procedures\*; Internal Revenue Code Section 42\*; human relations; interviewing; TE Bond Manual\*; Ohio Revised Code (ORC) Section 142\*; HOME regulations\*; Americans with Disabilities Act\*; Ohio Housing Finance Agency (OHFA) guidelines\*; ORC relative tenant/owner rights; Tenant Landlord Act\*; HUD & IRS regulations & Fair Housing Law\*. Skill in operation of personal computer, calculator & office equipment; Microsoft Office Suite (e.g., Word, Excel, Access)\*; circuit detector & tape measure\*. Ability to interpret extensive variety of technical material in books, journals & manuals; use research methods in gathering data; review government accounting data for accuracy & completeness; prepare inspection reports & computer worksheets; handle complex inquiries from projects, general public or government officials; cooperate with co-workers on group projects; demonstrate physical fitness to conduct inspections of housing projects.

(\*)Developed after employment.

**MINIMUM CLASS QUALIFICATIONS FOR EMPLOYMENT**

Completion of undergraduate core program in accounting; must be able to provide own transportation.

-Or 24 mos. exp. in low-income housing tax credit industry or maintenance/monitoring of subsidized housing projects & regulations or residential property management; must be able to provide own transportation.

-Or equivalent of Minimum Class Qualifications For Employment noted above.

**TRAINING AND DEVELOPMENT REQUIRED TO REMAIN IN THE CLASSIFICATION AFTER EMPLOYMENT**

Successful completion of formal training program scheduled by Office of Program Compliance which is designed to supplement, reinforce or enhance Housing Examiner knowledge. Upon completion of 12 mos. exp. as Housing Examiner Trainee, 67351, at least two (2) satisfactory performance evaluations (i.e., mid-probationary & probationary) as Housing

Examiner Trainee, 67351, successful completion of entry level training program (i.e., Basic Compliance Training, Compliance Tool Reporting Training), obtain professional certification (i.e., Specialist in Housing Credit Management (SHCM) or Housing Credit Certified Professional (HCCP) & act as lead on sufficient number of reviews to demonstrate ability to complete duties of a Housing Examiner, 67352, employees will be automatically reassigned to Housing Examiner, 67352.

**UNUSUAL WORKING CONDITIONS**

Requires extensive travel, regular overnight stays, exposure to unsanitary conditions & individuals who may become violent or may be under the influence of drugs. Climbs stairs and walks for long periods of time when inspecting large properties; may be required to climb ladders to inspect building roofs.

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**JOB DUTIES IN ORDER OF IMPORTANCE (These duties are illustrative only. Incumbents may perform some or all of these duties or other job-related duties as assigned.)**

Independently or with assistance from Housing Examiner Trainee, examines & reviews Section 8 tenant certifications &/or tax credit tenant income certifications & housing assistance payments for accuracy, completeness & legitimacy & evaluates property expenditures to determine need of additional subsidy & calculates special rent increases (i.e., conducts financial, operational & compliance review of site inspection findings to ensure adherence to government housing regulations, ensuring 8823's are warranted & to justify findings & recommendations; analyzes consumption data (e.g., gas, electric, water) for resident paid utilities to determine utility allowance for each unit size within project; reviews government accounting data (e.g., financial statements, balance sheets, statement of profit & loss, source & disposition of funds, cash surplus statement, auditor summary) & compiles into computer for spreadsheet analysis in calculation of rent increase; travels to projects to conduct interior & exterior physical inspections of occupied subsidized multifamily projects to evaluate overall performance of building owners/managers regarding occupancy requirements, subsidy of fund controls, environmental controls, administration & maintenance; conducts site inspections of projects for curb appeal, routine maintenance & general overall appearance) & acts as lead worker & mentor over housing examiner trainees (i.e., provides work direction & training).

Oversees preparation &/or prepares necessary work papers, related inspection materials & preliminary inspection reports; analyzes information gathered during onsite reviews to finalize findings & initiate corrective action plan for improvement of deficiencies or non-compliance; prepares & sends owner notification of non-compliance; establishes correction period & corresponds with property owners during correction period to reconcile discrepancies; attends meetings to review inspection findings with appropriate representatives.

Reviews, processes & makes recommendations regarding variety of property owner requests (e.g., qualified contracts, ownership changes & management company approvals); advises building owners/managers, general public & government officials on occupancy matters (e.g., admissions, income limits, rent determinations, family income certification, grievance procedures, fair housing); develops training guide materials for building owners/managers on government & agency policies; conducts training sessions & coordinates orientation for new property owner staff.

Oversees subsidized housing files &/or tax credit compliance files; enters owner/property status information into housing software; tracks status & creates spreadsheets for analysis; prepares, analyzes, maintains &/or oversees preparation & maintenance of variety of fiscal &/or budgetary reports, records, studies &/or correspondence (e.g., fiscal accounting reports, payroll projections, budget outlay projections, quarterly & annual financial reports, analysis of division expense for budgetary needs progress reports, funding information).

**MAJOR WORKER CHARACTERISTICS**

Knowledge of accounting; employee training & development\*; subsidized housing projects & tax credit project policies & procedures; Internal Revenue Code Section 42; human relations; interviewing; TE Bond Manual; Ohio Revised Code (ORC) Section 142; HOME regulations; Americans with Disabilities Act; Ohio Housing Finance Agency (OHFA) guidelines; ORC relative tenant/owner rights; Tenant Landlord Act; HUD & IRS regulations & Fair Housing Law. Skill in operation of personal computer, calculator & office equipment; Microsoft Office Suite (e.g., Word, Excel, Access); circuit detector & tape measure. Ability to interpret extensive variety of technical material in books, journals & manuals; use research methods in gathering data; review government accounting data for accuracy & completeness; prepare inspection reports & computer worksheets; handle complex inquiries from projects, general public or government officials; cooperate with co-workers on group projects; demonstrate physical fitness to conduct inspections of housing projects.

(\*)Developed after employment.

**MINIMUM CLASS QUALIFICATIONS FOR EMPLOYMENT**

12 mos. exp. as Housing Examiner Trainee, 67351; must be able to provide own transportation.

-Or equivalent of Minimum Class Qualifications For Employment noted above.

**TRAINING AND DEVELOPMENT REQUIRED TO REMAIN IN THE CLASSIFICATION AFTER EMPLOYMENT**

Maintain professional certification (i.e., Specialist in Housing Credit Management (SHCM) or Housing Credit Certified Professional (HCCP).

**UNUSUAL WORKING CONDITIONS**

Requires extensive travel, regular overnight stays, exposure to unsanitary conditions & individuals who may become

violent or may be under the influence of drugs. Climbs stairs and walks for long periods of time when inspecting large properties; may be required to climb ladders to inspect building roofs.