



Update on HUD's LIHTC Tenant-Level Data Collection

TRACS Quarterly Meeting
March 17, 2010



Overview

1. Review of Requirements
2. Update on Implementation
 - Publication of Forms
 - Initial Data Submission
3. Providing Assistance to the States



Statutory Requirement:

Housing and Economic Recovery Act (HERA) of 2008

- a) State agencies must provide to HUD:
 - Race;
 - Ethnicity;
 - Family Composition;
 - Age;
 - Income;
 - Use of Rental Assistance;
 - Disability Status; and
 - Monthly Rental Payments
- b) HUD's Responsibility:
 - Establish standards and definitions for the data collection; and
 - Provide States with technical assistance in establishing systems to compile and submit the data.
- c) Data must be collected at least annually and made publically available.
- d) No funds have been appropriated to support data collection.



Data Collection Forms

- HUD is proposing to use two data collection forms:
 - Project Characteristics
 - Tenant Data
- Forms are currently in the required 60-day OMB review period.
- Following OMB review, the forms will be published as final.



Initial Submission of Data

- First data collection will include:
 1. All properties placed into service in 2008 & 2009.
 - Plus, any omissions from previous years.
 2. All tenants in LIHTC units as of Dec. 31, 2009.
 - For initial submission, states are not expected to submit data not already in-house.
- States should prepare to submit data in the second half of 2010.



Submission Details

1. Following OMB approval, HUD will send specific instructions to states.
2. For initial submission, states are not expected to submit data not already collected from tenants.
 - States, however, should begin making plans to collect the data for the 2011 submission.
3. If annual certification not required (i.e. 100% low-income properties), submit most recent data.



Providing Assistance to States

- HUD contracted with Abt (and Pyramid as subcontractor) to provide assistance to states.
- Abt has begun contacting state agencies to assess needs.
- Needs will be prioritized and addressed to the extent possible.
- Funds are extremely limited for this contract and no grant money was appropriated.