ADVISORY SERVICES

GENERAL OVERVIEW

APPLICANT'S RELOCATION SPECIALIST

DCA requires that the Applicant engage a Relocation Specialist to provide the following relocation advisory services to work with eligible Residents.

1. To determine the most appropriate relocation/displacement strategy;
2. To understand the Relocation/Displacement Plan and why they must relocate;
3. To understand the benefits/assistance they will receive, and
4. To understand their protections and rights under DCA and HUD policy as applicable.

Advisory services are encouraged to be done by a third party, such as a nonprofit, advocacy group, relocation specialist, or local government. The entity providing advisory services must have prior experience in face-to-face community engagement among the tenancy served. When available, DCA will also recommend a community advocate partner.

The Applicant's Relocation Specialist's resume must be submitted at Application. The resume must show the following:

1. Experience in direct, in-person interactions with Residents and Non-Residential Tenants;
2. History of providing relocation guidance and implementing assistance; and
3. Relevant certifications and training (such as the Relocation Assistance 500 Series from the International Right of Way Association). For a relocation specialist that is not certified, include completed course descriptions.
    a. **URA:** Relocation Specialist must have completed all available, applicable modules of URA the HUD Way (www.hudexchange.info/trainings/ura-the-hud-way/).

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1. Plan
   Determine the most appropriate relocation/displacement strategy. Write the Relocation Plan.

2. Claims, Payments, and Grievances
    a. Assist Residents and Non-Residential Tenants in preparing claims;
    b. Process claims and provide advance payment when needed; and
    c. Respond to grievances promptly. Refer Residents and Non-Residential Tenants to DCA.

3. No Coercion
   Applicants may not request or coerce Residents and Non-Residential Tenants to waive their rights to payments and services. Applicants may only provide incentives to Residents and Non-Residential Tenants who accept relocation assistance if these incentives are in addition to entitled relocation assistance and if it is documented outside of the project budget. Source documentation is required.
    a. Waiver of Assistance: DCA may accept a written statement from the displaced person that states that they have chosen not to accept some or all of the payments or assistance to which they are entitled. Any such written statement must include:

i. A signed copy of the NOE or NND;
ii. The statement must specifically identify which assistance or payments they have chosen not to accept. The statement must be signed and dated and may not be coerced by the Applicant, Project Team, or any Project Team Participants, including Applicant's Relocation Specialists; and
iii. Resident and Non-Residential Tenant explanation of why they chose to move.

b. **RAD:** No tactics may be employed to pressure Residents and Non-Residential Tenants into relinquishing their right to return or accepting alternative housing options. A Resident's and Non-Residential Tenant's lease may not be terminated due to resident seeking to exercise right to return.

4. **URA:** See 49 CFR § 24.205(c) - Relocation planning, advisory services, and coordination. This includes an offer to transport all displaced persons to inspect housing to which they are referred.

5. Communicate
Follow required notification and advisory service procedures to minimize the risk that families leave the property because they lack information or are not informed of the project's relocation plans or their rights. Resident's and Non-Residential Tenant's rights should be presented in an easy-to-understand format. Foster communication during the work process through regular notices and regular Residents and Non-Residential Tenants' meetings. All notices must be delivered in a timely manner. Notices must be personally served with a signature receipt or sent by certified or registered first class mail, return receipt requested. Samples of notices and posters are included on the DCA website under Relocation Forms section. They must be clear and easily understood, as well as translated into all primary languages spoken by Residents and Non-Residential Tenants.

Communication (notices, meetings, schedules) within the required timeframe and interviewing heads of household, ensures Residents and Non-Residential Tenants understand:

a. Interview
If resident or non-residential tenant is unable to meet in a public space, then arrange a phone call or visit their home or business (if resident/non-residential tenant and relocation specialist are comfortable). These one-on-one meetings need to cover the following:
i. Provide information about the project, the Relocation/Displacement Plan and why they must relocate;
ii. Determine the needs and preferences of the Residents and Non-Residential Tenants to be relocated;
iii. Obtain basic information regarding household composition and income;
iv. Identify potential barriers or challenges to the relocation;
v. State the benefits/assistance which the person may be eligible to receive; and
    a. Assistance can include referrals to community organizations or other assistance.
vi. Their protections and rights under DCA and HUD policy as applicable.

b. Notices. *See Notice Requirements Section.*

FEEDBACK AND MEETINGS

For residents and non-residential tenants that are likely to return, the following section applies. The Applicant will be required to participate in the following engagement methods. DCA has the discretion to engage Residents as part of the redevelopment process and can choose which methods are applied.

1. Distribute a property / redevelopment survey
   DCA will provide a standard survey to each Applicant to distribute among all Residents and Non-Residential Tenants at the property.

   The survey must be distributed virtually, and paper copies mailed out/delivered by property managers with return envelopes and stamps. Surveys will also need to be brought to each meeting for Residents and Non-Residential Tenants to take in person if they did not already complete it. DCA and Applicant will receive all results.

   Residents and Non-Residential Tenants must have the option to organize, advertise, and meet onsite. Property Management/Applicant/Owner must not hinder resident organizing and may not participate unless invited by the organizing Residents.

2. Host Engagement Meetings at Property
   When public meetings are held:
   a. The meeting room and presentation must be accessible and understandable to all persons in the intended audience, regardless of disability or limited English language proficiency;
   b. Residents and Non-Residential Tenants must be given at least 7-day notice for any meeting; and
   c. There must be livestream capabilities or access to a recorded video for all in person meetings.

   Before the first meeting, the Applicant will send GIN notice, suggest Residents and Non-Residential Tenants meet with each other privately on their own and discuss ideas they have for the property, concluding with a request for them to attend the first meeting with the Applicant and their Relocation Specialist (*see GIN Notice*).

   a. Meetings will guide Residents and Non-Residential Tenants in the redevelopment process. They will be informed of what to expect, if relocation is necessary, and the initial redevelopment plans.
   b. First Meeting
      The first meeting must include a poster session. The facilitator must bring large posters for group brainstorming and discussion and bring individual property maps for Residents and Non-Residential Tenants and to mark ideas on.
      i. 9% Applications: First meeting must be held within 60 days after award; and
      ii. 4% Applications: First meeting must be held within 60 days before Application.
   c. Between First and Second Meetings
      Applicant must make a genuine effort to incorporate any feasible Resident's and Non-Residential Tenant's recommendations into redevelopment plan and submit changes to DCA.

   d. Second Meeting

Applicant must report back on Resident's and Non-Residential Tenant's suggestions, show changes that were made to plans in accordance with feedback from the first meeting, and what final steps are moving forward. Applicant must explain why suggestions were or were not incorporated.

DCA may require Applicant to incorporate other resident recommendations or adjust budget items to accommodate for certain recommendations they deem feasible.

COVID Adjustments: Meetings must have virtual options for COVID-based circumstances. Applicants must follow local and state ordinances regarding COVID 19 safety protocol. In the event no in person meeting are held, a poster will be displayed in the leasing office or another high traffic community area to allow Residents and Non-Residential Tenants to write their suggestions.