



## **2026 NAMFS Leadership Summit–Executive Brief**

### **Session: Improving Field Safety Through Communication, Standardized Reporting, and Shared Accountability**

The NAMFS Leadership Summit reinforced the importance of treating field safety as a shared responsibility across the entire mortgage field services and asset management service chain.

Building on the work of the NAMFS Safety Committee, participants examined how the industry can move beyond individual safety awareness toward more consistent hazard identification, communication, documentation, and escalation practices.

A central conclusion emerged: Identifying a safety concern provides limited protection if that information does not reach the individuals and organizations responsible for subsequent decisions and assignments.

The session emphasized practical, scalable solutions that leverage existing industry workflows rather than create unnecessary administrative burdens.

#### **Progress and Resources Developed**

NAMFS highlighted several accomplishments supporting its growing safety initiative:

- Completion of an industry safety survey to identify common risks and resource needs.
- Development of safety job aids and informational graphics covering property approaches, de-escalation, trespassing, and law enforcement interactions.
- Release of the *UNLOCKED Vendor Safety Series*, focused on real-world field safety situations.
- Development of a safety briefing framework and educational property occupancy verification resources.
- Establishment of a dedicated NAMFS Safety webpage to centralize resources and encourage industry participation.

These accomplishments provide a foundation for the next phase of the initiative.



## **Key Discussion Outcomes**

### **1. Safety Is a Service-Chain Responsibility**

Field professionals, coordinators, vendor managers, national providers, servicers, and asset managers all influence safety outcomes.

Participants highlighted situations where known hazards were not consistently communicated between organizations or across successive assignments.

The discussion emphasized the need for clearer expectations regarding how hazards are documented, escalated, communicated, and considered before additional work is authorized.

### **2. Modernizing Safety Reporting**

A significant opportunity identified was the integration of structured safety questions into inspection and Property Condition Report (PCR) forms.

Proposed enhancements included standardized, multi-select fields addressing observable property hazards, potentially threatening interactions, access concerns, and actions taken by field professionals.

Unlike narrative comments, structured data could make safety information more visible, searchable, reportable, and transferable between systems.

### **3. Establishing Property-Level Safety Alerts**

Participants explored developing standardized property safety flags that could distinguish between:

- Critical alerts: Conditions requiring immediate review or intervention before further assignments.
- Review alerts: Concerns requiring additional evaluation or clarification.
- Informational alerts: Relevant observations that should remain associated with the property.

An important objective is ensuring documented hazards remain visible when properties are reassigned, helping prevent repeated exposure to previously identified risks.

### **4. Expanding Practical Safety Education**

The discussion supported developing concise, scenario-based resources tailored to the different responsibilities of inspection and preservation professionals.

Short-form educational videos, recurring safety briefings, and targeted job aids could



reinforce sound field decisions and complement the more comprehensive education available through the NAMFS Academy.

Potential subjects include occupant interactions, communicating the purpose of a property visit, recognizing warning signs, safely disengaging, and responding to uncertain or potentially hostile conditions.

### **5. Improving Public Communication and Professional Identification**

Participants evaluated how informational notices, QR-enabled resources, and professional identification practices could reduce misunderstandings during property visits.

The discussion also recognized the importance of clearly distinguishing the role of NAMFS as a trade association from the responsibilities of individual service providers, while considering potential liability, privacy, and public perception concerns.

#### **Strategic Implications**

The next opportunity for meaningful progress lies in connecting existing safety education with operational practices that make hazard information accessible and actionable.

Industry adoption of consistent reporting fields and property-level safety alerts could strengthen risk management, improve assignment decisions, reduce repeat exposure to known hazards, and help protect both field professionals and the organizations that rely upon their services.

#### **Recommended Next Steps**

- Refine proposed safety reporting questions for inspection and property condition forms.
- Work with national service providers, servicing platforms, and industry stakeholders to explore standardized safety data fields and property-level alerts.
- Develop practical escalation and communication guidelines addressing how safety concerns move throughout the service chain.
- Expand scenario-based job aids, short-form educational resources, and recurring safety briefings.
- Continue collecting industry feedback and encouraging active participation in the NAMFS Safety Committee.

#### **Executive Takeaway**

A safer industry requires more than recognizing hazards. It requires ensuring that the right information reaches the right people before the next assignment is made.



The Leadership Summit reinforced a shared commitment to developing practical standards, communication processes, and educational resources that prioritize field safety throughout the service chain.

The continued evolution of the NAMFS Safety Initiative represents an opportunity to turn industry collaboration into meaningful and measurable improvements in field safety practices.