



APPENDIX F

TARGETING PLANS

All approved Projects will be required to target ten percent (10%) of the total Project Units to the Target Population (Persons with a Disability). Projects targeting Units under this subsection are not required to provide on-site supportive services or a service coordinator. The Applicant must complete the Targeting Plan tab in its entirety. Subsequent to LIHTC award, the Owner shall demonstrate a partnership with a Local Lead Agency and submit a Targeting Plan for review and approval by IFA. The Ownership Entity or Developer will agree to complete the requirements of subsection 5.16 of the QAP and Appendix F at least 120 days prior to the first Unit being Placed-in-Service. (IFA may set additional interim requirements.)

Category Overview

At a minimum, the Targeting Plan shall include:

- (a) A description of how the Project will meet the needs of the targeted tenants including adaptability, Accessibility or assistive technology features, access to supportive services, transportation, rent subsidy and proximity to community amenities.
- (b) A description of the experience of the Local Lead Agency and their capacity to provide access to supportive services and to maintain relationships with the Management Company and community service providers for the duration of the compliance period.
- (c) A Memorandum of Understanding (MOU) between the Ownership Entity or Developer, Management Company and the Lead Local Agency must be submitted with the Carryover Package. At a minimum, the MOU shall include the following:
 - (i) A commitment from the Local Lead Agency to provide, coordinate and/or act as a referral agent to assure that supportive services will be available to the Target Population.
 - (ii) The referral and screening process that will be used to refer tenants to the Project, the screening criteria that will be used, and the willingness of all parties to negotiate reasonable accommodations to facilitate the admittance of Target Population tenants into the Project.
 - (iii) A communications plan between the Management Company and the Local Lead Agency that will accommodate staff turnover and assure continuing linkages between the Project and the Local Lead Agency for the duration of the compliance period.
- (d) Certification that participation in supportive services will not be a condition of tenancy.
- (e) Commitment to hold throughout the Compliance Period, pursuant to IFA's Held for Occupancy policy, ten percent (10%) of the total Project Units for occupancy by the Target Population.
- (f) Agreement to affirmatively market to the Target Population.
- (g) Agreement to include a section on reasonable accommodation in the Management Company's application for tenancy.
- (h) Agreement to accept Section 8 vouchers or certificates (or other rental assistance) as allowable income as part of property management income requirement guidelines for eligible tenants and not require total income

for persons with rental assistance beyond that which is reasonably available to persons with disabilities currently receiving SSI and SSDI benefits.

(i) A description of how the Project will make the targeted Units affordable to Extremely Low-Income households.

(j) The Management Company shall agree to show a preference for Persons with a Disability on the waiting list as part of the Project's Affirmative Fair Housing Marketing Plan. The Management Company must also note if the tenant household has a need for an Accessible unit.

(k) The Applicant is responsible for ensuring that all Affirmative Fair Housing requirements are met.

(l) The Project's Targeting Plan requirements will be specified in the LURA.

(m) The requirements of this subsection may be fully or partially waived to the extent the Agency determines that they are not feasible. A Targeting Plan template and other documents related to subsection 5.16 of the QAP are included in Appendix F (incorporated herein by reference – see attached Targeting Plan Template). The Ownership Entity or Developer will agree to complete the requirements of subsection 5.16 of the QAP and Appendix F at least 120 days prior to the first Unit being Placed-in-Service. (IFA may set additional interim requirements.) This subsection does not apply to tax-exempt bond Applications.

Boarding Home Registration

The Boarding Home Registration certification on the Targeting Plan tab must be completed as part of the on-line application submission. Iowa law (Iowa Code Chapter 135O and Iowa Administrative Code 481 – chapter 66) requires that owners, operators, or managers of a "boarding home" register the property with the Iowa Department of Inspections and Appeals (DIA) and submit an annual occupancy report. A "boarding home" has a specific definition under Iowa law that may apply to a residential apartment building. Please review Iowa's requirements at the DIA Boarding Home Registration web site to determine if the Project must comply upon completion. After review of the applicable law and administrative rules, complete the Boarding Home Registration certification on the Targeting Plan tab in the on-line application.

Abbreviated Glossary of Terms **also refer to QAP Appendix 2 – Glossary of Terms**

Assisted Living Program/Facility means housing with services, as defined in Chapter 231C of the Iowa Code. The Developer must have successfully obtained an Assisted Living certification for at least one Project from the State of Iowa and is currently in good standing with the Iowa Dept. of Inspections and Appeals.

Accessible Units means the following;

- **Fully Accessible Unit:** A dwelling Unit designed and constructed for full Accessibility in accordance with Section 1002 of ICC A117.1.
- **Type A Unit:** A dwelling Unit designed and constructed for Accessibility in accordance with the provisions for Type A Units in ICC A117.1- 2009.
- **Type B Unit:** A dwelling Unit designed and constructed for accessibility in accordance with the provisions for Type B Units in ICC A117.1
- **Visitable (Type C) Unit:** A dwelling Unit designed and constructed for Accessibility in accordance with the provisions for Type C Units in ICC A117.1,
- **Units with Accessible Communication Features:** A dwelling Unit designed and constructed to include accessible communication features in accordance with the provisions for such Units in ICC A117.

Disability means at least one of the following criteria: 1) Has a physical, mental or emotional impairment which is expected to be of long-continued and indefinite duration, substantially impedes the person's ability to live independently, and is of a nature that such ability could be improved by more suitable housing conditions; OR 2) Has a developmental Disability, defined as a severe chronic Disability which is attributable to a mental or physical impairment or combination of mental and physical impairments, is manifested before the Person attains age 22, is likely to continue indefinitely, results in substantial functional limitation in three or more of the following areas of major life activity: self-care, receptive and expressive language, learning, mobility, self-direction, capacity for independent living, and economic self-sufficiency; and which reflects the person's need for a combination and sequence of special, interdisciplinary, or generic care, treatment, or other services which are of lifelong, or extended duration and are individually planned and coordinated.

Held for Occupancy means the percentage of the total Project Units specified in the approved Application must be designed and Held for Occupancy by members of the Target Population, with IFA's "Held for Occupancy Policy" that states the following: (1) During initial lease-up, priority must be given in the tenant screening process to income-qualified households in the Target Population. A minimum of the percentage of total Project Units committed in the approved Application for occupancy by the Target Population (the "Minimum Unit Percentage") up to a maximum of twenty-five percent (25%) of the total Project Units must be Held for Occupancy by qualified Target Population households until the lesser of such time as the minimum unit commitment has been met or for a period of 60 days from the Placed-in-Service date; (2) Once a Unit occupied by a Target Population household has vacated, that Unit must be held for a minimum of 30 days for occupancy by another qualified Target Population household unless the Project otherwise complies with the Minimum Unit Percentage. Efforts to market the available Unit to the Target Population must be demonstrated during this time period; (3) If after a 30-day period the Unit is leased to a household that does not meet the Target Population commitment and the Project does not otherwise meet the Minimum Unit Percentage, the next subsequent available Unit must be marketed to and Held for Occupancy by the Target Population for 30 days. This subsequent unoccupied Unit rule will continue to apply until the Project has once again met its Minimum Unit Percentage requirement; (4) Any household that qualified as a member of the Target Population at initial occupancy or at any time during occupancy will be counted as occupying a qualified service plan Unit when calculating the Project's compliance with the Minimum Unit Percentage; (5) The Project must comply with the Minimum Unit Percentage and all other Target Population requirements at initial lease-up and throughout the 15-year Compliance Period and the Extended Use Period, if applicable. In addition, the Target Population commitments will be specified in the LURA.

Implementation of the Held for Occupancy policy's required 30-day hold period shall begin on the date the tenant gives notice to vacate. In theory, the 30-day hold marketing of the available Unit to the Target Population will be done while the Unit is still occupied. Once the tenant leaves the Project at the end of the 30-day notice period, the Project will rent the Unit to the next eligible applicant, giving priority to members of the Target Population.

If the tenant does not provide a 30-day notice to vacate, the 30-day hold period will begin on the day Property Management becomes aware of the tenant household's intent to vacate or becomes aware that the tenant has already moved out of the Unit. Compliance with the 30-day hold period must be demonstrated whether or not the tenant provides a full 30-day notice to vacate.

Local Lead Agency means a nonprofit organization, an Aging and Disability Resource Center, or a governmental or quasi-governmental entity that is not affiliated with or Controlled by a for-profit organization and includes in its mission the provision of case management, service coordination, or social services to improve the quality of life of Persons with Disabilities. The Local Lead Agency or its direct predecessor entity must have a minimum of two years of experience in serving Persons with Disabilities in the state of Iowa.

Low-Income Unit means any residential rental Unit if such Unit is rent-restricted and the occupant's income meets the limitations applicable as required for a qualified low-income housing Project.

Target Population means Persons with a physical or mental, and/or developmental Disability, which may include persons with brain injury, mental illness, or co-occurring disorders.