



# 2009 LIHTC Developer Training

## Relocation Plan and Resident Populations with Special Needs

Terri Rosonke

HousingIowa Development Specialist

515.725.4956

[terri.rosonke@iowa.gov](mailto:terri.rosonke@iowa.gov)



# Relocation Plan

## Relocation Plan

- QAP, page 21
  - Section 5, Threshold Requirements – All Developers/Ownership Entities
    - Section 5.5, Displacement of Tenants
- Exhibit 13T
  - Threshold Exhibit revised for 2009.
  - Required if the Project scope requires any form of temporary or permanent relocation of existing tenants.



# Relocation Plan

## Exhibit 13T

- Project Name
- Relocation Type
  - Temporary
  - Permanent
  - URA
  - Section 104(d)
- Units
- Tenants
- Budget
  - Sources
  - Uses



# Relocation Plan

- Relocation Plan Details (attach additional sheets)
  - At a minimum, must include sections addressing each specified bullet point.
  - All tenant relocation notices must be personally served or sent by certified or registered first-class mail, return receipt requested, and must identify the name and telephone number of a responsible party who tenants may contact for additional information.
- Record Keeping



# Special Needs

## Resident Populations with Special Needs

- QAP, page 23
  - Section 6, Scoring Criteria
    - Resident Populations with Special Needs, Category 3
- Appendix G
- Exhibit 1S
  - Scoring Exhibit revised for 2009.
  - Significant changes in scoring methodology.



# Special Needs

## Scoring

- In order to qualify for points under this category, projects must provide service-enriched housing in which 25% or more of the total Project units give preference in tenant selection to any of the specified special needs populations **AND**
- Services must be actively linked to the Project, not simply provided to the community at-large **AND**
- The Applicant must submit all requested documentation in Exhibit 1S.

➡ If all scoring requirements are met, **30 points** awarded.



# Special Needs

## Exhibit 1S

### 1. Special Needs Target Population(s) Selected

- Homeless persons, including homeless individuals, families, youth, and/or veterans
- Persons with a physical, mental, and/or developmental Disability
- Persons with mental illness
- Victims of domestic violence
- Frail Older Persons
- Persons living with HIV/AIDS
- Persons in recovery from chemical dependency



# Special Needs

2. Number and Percentage of Total Project Units Giving Preference to Special Needs Target Population(s).
  - Note total Project units, not LIHTC units.
  
3. Commitment to hold, pursuant to IFA's held for occupancy policy, 25% or more of the total Project units for occupancy by the selected Special Needs Target Population(s).
  - IFA's "held for occupancy" policy is outlined in Section 3 of Exhibit 1S



# Special Needs

4. Comprehensive Supportive Services Plan
  - Must be attached to Exhibit 1S following the corresponding cover sheet on page 5.
  - Must include clearly labeled sections addressing each of the specified items.
  - Supportive services must not be a condition of residency.



# Special Needs

## 5. Service Budget

- Must be attached to Exhibit 1S following the corresponding cover sheet on page 6.
- Identify all service related sources and uses (cash and in-kind), including the \$150 per LIHTC unit minimum annual contribution from the pro forma's supportive services line item.
- Must include sufficient funds to implement the described plan of services (resources beyond pro forma minimum).



# Special Needs

## 6. Marketing Plan

- Must be attached to Exhibit 1 following the corresponding cover sheet on page 7.

## 7. Supportive Services MOU

- Must be attached to Exhibit 1 following the corresponding cover sheet on page 8.
- MOU must be executed by the Ownership Entity or Developer, the lead service provider, and the Management Company.
- At a minimum, must contain all specified components.



# Special Needs

## 8. Local Service Providers

- If applicable, must be attached to Exhibit 1S following the corresponding cover sheet on page 9.
- Applicable if services will be delivered by outside organizations.
- List all service providers identified as integral to implementation of the Comprehensive Supportive Service Plan and provide a corresponding letter, agreement, or contract with each identified key service provider.



# Special Needs

## Measuring and Reporting Outcomes

- Measurements should relate to each established service program goal and be outcome-based.
- Reports to IFA are not tenant-specific (aggregate summaries only – forms developed in 2008).
- Outcome-based measurement tools are available

National Resident Services Collaborative

[www.residentservices.org/outcome-measurement.asp](http://www.residentservices.org/outcome-measurement.asp)

Pangea Foundation

[www.pangeafoundation.org/nonprofit\\_software\\_resident\\_services.html](http://www.pangeafoundation.org/nonprofit_software_resident_services.html)



# Supportive Services

## **Additional Resources**

- Corporation for Supportive Housing  
[www.csh.org](http://www.csh.org)
- National Resident Services Collaborative  
[www.residentservices.org](http://www.residentservices.org)
- NeighborWorks Learning Center Consortium  
[www.nw.org/learningcenters](http://www.nw.org/learningcenters)
- Enterprise Community Partners  
[www.enterprisecommunity.org/programs/resident\\_services](http://www.enterprisecommunity.org/programs/resident_services)
- American Association of Service Coordinators  
[www.servicecoordinator.org](http://www.servicecoordinator.org)