

Services Plan – Application Supplement

Service planning for proposing targeted units to people who need housing with services (including homeless set-asides)

VHFA requires applicants for Low Income Housing Tax Credits to provide Service Plans that detail how the service needs of all tenants will be met, including targeted services for sub-populations, such as people who have experienced homelessness. Submission of a service plan is part of the required application for all projects (item C-8 on application checklist), and should at minimum include the following:

1. Identify whether services are for population-level service coordination (ie for all residents of a project or building) or targeted for a subpopulation of residents (ie formerly homeless households).
2. List the organizations who will be referring eligible applicants to the project and describe how the referral process will work.
 - *Best practice:* Build into an existing system such as the local [coordinated entry](#) system (for people experiencing homelessness). Connect with local Agency of Human Services (AHS) [Field Services Directors](#) to learn more.
3. Identify the services that will be available to tenants, who will be providing the services, how they will be tailored to the needs of the population you are serving, and why they will be successful in meeting the needs of residents. Please identify proposed funding sources used for service provision.
 - *Requirement:* Services offered must be voluntary. If a tenant is abiding by the terms of his/her lease, there should be no requirement to participate in services.
 - *Best practice for homeless services:* Have an MOU with service providers that is reviewed annually. At a minimum we require a letter of support from each partner service agency describing the relationship with the project. A [sample MOU](#) is available on VHFA's website.
 - *Best practice for population services:* Demonstrate on site Resident Services Coordinators have been trained in housing retention and eviction prevention. Housing retention and eviction prevention services could include one-on-one or group services available on demand to all residents of a project. Strategies may include classes, financial coaching, and early intervention strategies with mediation and conflict resolution strategies. This level of service provision is likely to include brief intervention strategies with screening and referral.
4. Show the unmet need in the region for housing with services for the target population.
 - *Best practice:* Use most recent [Point In Time](#) figures for homeless sub-populations. Talk with local homeless shelters to get statistics of need by population. Use existing waiting lists of nearby housing (if available).
5. Who will determine eligibility for homelessness or at-risk of homelessness, and how will it be documented?
 - *Requirement:* [Use HUD definition](#), as stated in the Qualified Allocation Plan (QAP), and recordkeeping requirements (Section 6.3).
 - *Best practice:* Rely on a trusted service provider with experience determining homeless and at-risk eligibility, such as for Shelter Plus Care or other similar programs.

6. A current inventory of existing homeless-targeted units with services within a developer's owned portfolio is required for projects which elect to place homeless-targeted units at a portfolio site instead of in the project site in this application.
 - *Requirement:* Include: development name, total units, number of existing housing units with services, and additional units being proposed to target homeless households. Also, portfolio housing being proposed must be in acceptable proximity to the new development (ie, within the same market or county).
7. For homeless-targeted units, describe the management company's connection to the [Continuum of Care](#) (if any).
8. For homeless-targeted units, explain how you anticipate balancing applications from at-risk and literal homelessness.
9. List any options there are to assist with tenant rent if there is no project-based assistance for targeted units.
10. For projects proposing to participate in the local Coordinated Entry process:
 - What's the history of your organization's participation? Such as, how long have you participated, in what capacity, and are there committees where your agency is represented?
 - How will your organization participate in the [data sharing](#) component of Coordinated Entry?
 - What will be the process if no one from the Coordinated Entry waiting list is eligible for the targeted units?
11. For projects considering a Master Lease model:
 - *Requirement:* A master lease is signed by the landlord and the service agency for a term of 6 months or longer. The service agency in turn would sign a lease or occupancy agreement with a tenant for a least 6 months or longer. Some landlords also require the tenant to sign a lease. Both leases must specify all requirements of the tax credit program and any additional requirements of the landlord. The tax credit lease must include a lease addendum for the Violence Against Women Act.
 - *Best practice:* We recommended participants start with the HUD Model Lease. It is highly recommended each lease include tax credit requirements (including income and rent restrictions, student rules, accessible units, increase in income, transfers, adding new members, fair housing, optional fees, etc.), lead paint addendum and attach house rules (including smoking and pet policies). A sample [Master Lease](#) is available online.
12. For projects considering a SASH model:
 - *Requirement:* Proof that the new SASH units are additive to the state's inventory of supported units.
 - Is the proposed project site-based, community complex, or mixed?
 - *Best practice:* When targeting units to people who are homeless and using the SASH program to provide services, the site-based model is preferred because community complex and mixed models require individual tenants enroll in Medicare for SASH funding.