

Supportive Services

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Terms and Definitions

- **Land Use Restriction Agreement (LURA)**

- The document which outlines what is required under the program for each development.
- The development may have more than one LURA based on funding sources.

- **Supportive Services or Social Services**

- Required events and services to be held with regards to the program under which the development operates.

- **Programs Discussed:**

- Low-Income Housing Tax Credit (LIHTC or HTC)
- BOND
- Tax Credit Exchange Program (TCEP or Exchange)
- Multifamily Direct Loan (MFDL)
 - HOME, HOME-ARP, TCAP RF, National Housing Trust Fund (NHTF)

3

Monitoring for Supportive Services

- If a development's LURA requires the provision of supportive services the Department will confirm this requirement is being met in accordance with the LURA.
- Owners are required to maintain sufficient documentation to evidence that services are being provided. Documentation will be reviewed during monitoring reviews, beginning with the first review.
 - Planned services with specific dates may suffice as evidence of compliance during the first monitoring review.
- Evidence of services must be submitted to the Department upon request.
- If the development's LURA requires a monthly expenditure for the provision of services, the Department will monitor to confirm compliance.

4

Supportive Services; not just for Tax Credit

Supportive Services are now required in some Multifamily Direct Loan (MFDL) LURAs, in addition to the Housing Tax Credit and BOND programs that have always required services. Any program LURA should be reviewed in detail to ensure compliance with the program requirements outlined.

5

Qualified Allocation Plan (QAP) Requirements

- All multifamily programs are governed by the Uniform Multifamily Rules and applicable provisions of the Qualified Allocation Plan (QAP)
 - Annually, the QAP will list the Resident Supportive Services available for developments applying for funds.
- QAP requirements change from year to year
 - The documents from previous years are available online under the archives.
- The full code can be found online at the following link:
<https://www.tdhca.texas.gov/multifamily-programs-qap-nofas-and-rules>

6

Qualified Allocation Plan (QAP) Example: 2006

(9) **The Services to be Provided to Tenants of the Development.** Applications may qualify to receive up to 8 points. Applications may qualify for points under both subparagraphs (A) and (B) of this paragraph. (2306.6710(b)(1)(I); 2306.254; 2306.6725(a)(1); General Appropriation Act, Article VII, Rider 7)

(A) Applicants will receive points for coordinating their tenant services with those services provided through state workforce development and welfare programs as evidenced by execution of a Tenant Supportive Services Certification (2 points).

(B) The Applicant must certify that the Development will provide a combination of special supportive services appropriate for the proposed tenants. The provision of supportive services will be included in the LURA as selected from the list of services identified in this subparagraph. No fees may be charged to the tenants for any of the services. Services must be provided on-site or transportation to off-site services must be provided (maximum of 6 points).

(i) Applications will be awarded points for selecting services listed in clause (ii) of this subparagraph based on the following scoring range:

(I) Two points will be awarded for providing two of the services; or

(II) Four points will be awarded for providing four of the services; or

(III) Six points will be awarded for providing six of the services.

(ii) Service options include child care; transportation; basic adult education; legal assistance; counseling services; GED preparation; English as a second language classes; vocational training; home buyer education; credit counseling; financial planning assistance or courses; health screening services; health and nutritional courses; organized team sports programs or youth programs; scholastic tutoring; any other programs described under Title IV-A of the Social Security Act (42 U.S.C. §5601 et seq.) which enables children to be cared for in their homes or the homes of relatives; ends the dependence of needy families on government benefits by promoting job preparation, work and marriage; prevents and reduces the incidence of out-of wedlock

Signed by Governor Rick Perry November 16, 2005

Page 38 of 40

2006 Housing Tax Credit Program Qualified Allocation Plan and Rules

pregnancies; and encourages the formation and maintenance of two-parent families; any services addressed by §2306.254 Texas Government Code; or any other services approved in writing by the Department.

This is an excerpt from the 2006 QAP showing what services were required for Housing Tax Credit Applications.

Qualified Allocation Plan (QAP) Example: 2012-13

(9) **Tenant Services.** (§2306.6710(b)(1)(I) and §2306.6725(a)(1)) The purpose of this scoring item is to provide professional tenant services, tailored for the tenant population that will enhance the quality of life for the residents of the proposed Development. Applications may qualify to receive up to (10 points) for this item. By electing points, the Applicant certifies that the Development will provide a combination of supportive services, which are listed in §1.1 of this title, appropriate for the proposed tenants and that there is adequate space for the intended services. The provision and complete list of supportive services will be included in the LURA. The Owner may change, from time to time, the services offered; however, the overall points as selected at Application must remain the same. No fees may be charged to the tenants for any of the services. Services must be provided on-site or transportation to those off-site services identified on the list must be provided. The same service may not be used for more than one scoring item.

(c) **Tenant Services.** Tax-Exempt Bond Development Applications must include the provision of supportive services. No fees may be charged to the tenants for any of the services. Services must be provided on-site or transportation to off-site services as identified on the list must be provided. The provision of these services will be included in the LURA. Acceptable services include those described in §1.1 of this title (relating to Definitions and Amenities for Housing Program Activities).

This is an excerpt from the 2012-2013 QAP showing what was required for applications under those funding years.

Qualified Allocation Plan (QAP) Example: 2024

(3) Resident Supportive Services. (§2306.6710(b)(3) and (1)(G), and §2306.6725(b)(1)) A Development may qualify to receive up to eleven (11) points.

(A) The Applicant certifies that the Development will provide a combination of supportive services, which are listed in §11.101(b)(7) of this chapter (relating to Development Requirements and Restrictions) and meet the requirements of this section. (10 points).

(B) The Applicant certifies that the Development will contact local nonprofit or governmental providers of services that would support the health and well-being of the Department's residents, and will make Development community space available to them on a regularly-scheduled basis to provide outreach services and educate tenants. Applicants may contact service providers on the Department list, or other providers that serve the general area in which the Development is located. (2 points).

(4) Residents with Special Housing Needs. (§2306.6710(b)(4); §42(m)(1)(C)(v)) An Application may qualify to receive up to four (4) points by serving Residents with Special Housing Needs by selecting points under any combination of subparagraphs (A), (B), (C), of this paragraph. The Units identified for this scoring item may not be the same as those identified previously for the Section 811 PRA Program.

(A) The Development must commit at least 5% of the total Units to Persons with Special Housing Needs. For purposes of this subparagraph, Persons with Special Housing Needs is defined as a household where one or more individuals have alcohol or drug addiction, is a Colonia resident, a Person with a Disability, has Violence Against Women Act Protections (domestic violence, dating violence, sexual assault, and stalking), HIV/AIDS, homeless, veterans, and farmworkers. Throughout the Compliance Period, the Development must ensure that the Units are available to Persons with Special Housing Needs. In addition, the Department will require an initial minimum twelve-month period during which the Units must either be occupied by Persons with Special Housing Needs or held vacant until the Units receive HOME funds from any source. After the initial twelve-month period, the Development Owner will no longer be required to hold Units vacant for Persons with Special Housing Needs, but will be required to continue to specifically market Units to Persons with Special Housing Needs. (2 points)

(B) If the Development has committed units under subparagraph (A) of this paragraph, the Development must commit at least an additional 2% of the total Units to Persons with Special Housing Needs. (2 points)

(7) Resident Supportive Services [The resident supportive services include those listed in subparagraphs (A) - (E) of this paragraph, which are grouped primarily for organizational purposes. Applicants are not required to select a specific number of services from each section. Tax Exempt Bond Developments must select a minimum of eight points; Direct Loan Applications not layered with Housing Tax Credits must include enough services to meet a minimum of four points. The points selected and complete list of supportive services will be included in the LURA and the timeframe by which services are offered must be in accordance with §10.619 of this title (relating to Monitoring for Social Services) and maintained throughout the Affordability Period. The Owner may change, from time to time, the services offered; however, the overall points as selected at Application must remain the same. A Development Owner may be required to substantiate such service(s) if requested by staff. Should the QAP in subsequent years provide different services than those listed in subparagraphs (A) - (E) of this paragraph, the Development Owner may request an Amendment as provided in §10.405(a)(2) of this chapter (relating to Amendments and Extensions). The services provided should be those that will directly benefit the Target Population of the Development. Residents must be provided written notice of the elections made by the Development Owner. No fees may be charged to the residents for any of the services, there must be adequate space for the intended services and services offered should be accessible to all (e.g. exercise classes must be offered in a manner that would enable a person with a disability to participate). Unless otherwise specified, services must be provided on-site or transportation to those off-site services identified on the list must be provided. The same service may not be used for more than one scoring item. These services are intended to be provided by a qualified and reputable provider in the specified industry such that the experience and background of the provider demonstrates sufficient knowledge to be providing the service. In general, on-site leasing staff or property maintenance staff would not be considered a qualified provider. Where applicable, the services must be documented by a written agreement with the provider. Unless otherwise noted in a particular clause, courses and services must be offered by an onsite instructor(s).

(A) Transportation Supportive Services include:

- (i) shuttle, at least three days a week, to a grocery store and pharmacy or a major, big-box retailer that includes a grocery store and pharmacy, OR a daily shuttle, during the school year, to and from nearby schools not served by a school bus system for children who live at the Development (3.5 points); and

These pages show the requirements under the 2024 QAP.

As you can see, the requirements become more detailed with each QAP.

Learning Point #1

Only Housing Tax Credit developments have Supportive Services requirements. True or false?

Changes to Supportive Services

- A substantive modification of the scope of tenant services requires Board approval.
 - Such requests must comply with procedures in 10 TAC §10.405 (relating to Amendments and Extensions).
- It is not necessary to obtain prior written approval to change the provider of services unless the scope of services is being changed.
- Failure to comply with the requirements of this section shall result in a finding of noncompliance.

11

Required Monthly Expenditures

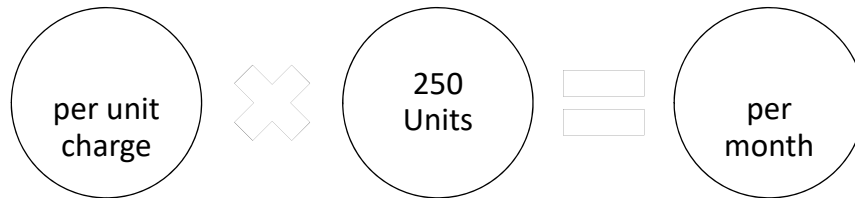
If the development's LURA requires a monthly expenditure for the provision of services, the Department will monitor to confirm compliance.

- Includable costs to support the expenditure include those costs directly related to providing the service(s). Such costs can include, but are not limited to, the cost of contracting the services with a qualified provider, cost of notification of such services (for example, a monthly newsletter), and other costs that can be documented and would only be incurred as a result of the service.
- An Owner cannot include any costs related to the normal expense of maintaining or operating a development, utility bills of any kind, in-kind contributions or services, cleaning or contracted janitorial services, office supplies, cost of copier or fax, costs incurred for maintenance of machinery, or volunteer hours.
- This list is not inclusive, but any other costs identified by the Owner shall be reviewed for consistency with this subsection.

12

Required Monthly Expenditures Example

For example: The owner has 250 units, 40% are required to be restricted at 60% with 100% of the units reserved for Eligible Tenants and the cost per unit is \$10. How much must the owner expend monthly?



13

How can you be successful with Supportive Services?

- Be familiar with the development's LURA and the Supportive Services requirements outlined therein.
- Advertise effectively with the tenants about the available services. If on-site staff is excited and energetic about the services then tenants will "feel" the energy and be more interested in attending the event.
 - Send out monthly notifications (newsletters, calendars, flyers, etc.)
 - Setup events on the development's social media platforms.
 - Use any other avenues available to the development to publicize the services being held at the property.
- Properly document all services held, even if there are no attendees.

14

Who, What, Where and When of Supportive Services

- Who?
 - The LURA will outline **who** is required to conduct the Social Services.
- What?
 - The LURA will outline **what** services are required for the specific development and program.
- Where?
 - The LURA will indicate **where** the services may be conducted, generally this will be on-site at the development or require that transportation is provided at no cost when the services are offered off-site.
- When?
 - The LURA will dictate **when** a service is to be offered; daily, weekly, monthly, quarterly, annually, etc.

Who provides the Supportive Services?

PROVISION OF SUPPORTIVE SERVICES/PROVISION OF TENANT SERVICES

The Development Owner has been awarded points based on providing a combination of special supportive services appropriate for the proposed tenants through the Extended Use Period. The Development Owner may change, from time to time, the services offered; however, the overall points must remain the same. **No rent or fees may be charged to the tenant for providing these services.** Services must be provided on-site or transportation to off-site services must be provided, there must be adequate space for the intended services, and services offered should be accessible to all. Tenants must be provided written notice of the elections made by the Development Owner. Owner must provide at a minimum _____ total points worth of services (maximum of 9 points; 10 for a Supportive Housing Development proposed by a Qualified Nonprofit) from the following list (the same service may not be used for more than one scoring item):

Supportive Services

Throughout the Compliance Period, unless otherwise permitted by the Department, a Local Tax Exempt Organization shall provide the following special supportive services that would not otherwise be available to the tenants: Health and wellness services.

At the time this Declaration is filed, the organization(s) providing these services is Visiting Nurse Association.

The Project Owner shall notify the Department (i) of any change in the status or role of such organization with respect to the Project and (ii) if such organization is proposed to be replaced by a different qualified Tax Exempt Organization.

Supportive Services

Throughout the Compliance Period, unless otherwise permitted by the Department, the Project Owner has contracted for the provision of the following special supportive services that would not otherwise be available to Tenants: Onsite availability of services such as financial planning assistance and courses; health screening services; health and nutrition courses; Utility Assistance; GED information; energy conservation training; Head Start; and family planning. At the time this Declaration is filed, the organization(s) providing these services is Community Action Agency San Patricio County, Inc. The Project Owner shall notify the Department (i) of any change in the status or role of such organization with respect to the Project and (ii) if such organization is proposed to be replaced by a different qualified provider.

Who provides the Supportive Services? - 2006/2007

Tenant Supportive Services

Coordination with State Programs. (2006 and 2007 allocations only)
The Development Owner agrees to coordinate their tenant services with those services provided through state workforce development and welfare programs.

The Development Owner will provide a combination of special supportive services appropriate for the proposed tenants. The provision of supportive services will be selected from the list of services identified below. No fee may be charged to tenants for any of the services. Services will be provided on-site or transportation to off-site services must be provided. (2006, 2007 and 2008 allocations)

A. Number of Services. Owner must provide, at a minimum, six of the following number of services from the list in paragraph B:

B. Service options include: Child care; transportation; basic adult education; legal assistance; counseling services; GED preparation; English as a second language classes; vocational training; home buyer education; credit counseling; financial planning assistance or courses; health screening services; health and nutritional courses; organized team sports programs, youth programs; scholastic tutoring; any other programs described under Title IV-A of the Social Security Act (42 U.S.C. §§ 601 et seq.) which enables children to be cared for in their homes or the homes of relatives; ends the dependence of needy families on government benefits by promoting job preparation, work and marriage; prevents and reduces the incidence of out of wedlock pregnancies; and encourages the formation and maintenance of two-parent families; any other services addressed by 2306.254 of Texas Government Code; or any other services approved in writing by the Department.

If your program was awarded in 2006 or 2007 your LURA may have the highlighted requirement to coordinate the tenant services with those services provided through state workforce development and welfare programs. You will need to reach out to those agencies in your area and coordinate the Supportive Services through those agencies in order to be compliant with the requirements of the LURA.

17

Provision of Supportive Services – Outreach & Education

PROVISION OF SUPPORTIVE SERVICES – OUTREACH & EDUCATION

The Development Owner was awarded an additional point for certifying that the Development will contact local nonprofit and governmental providers of services that would support the health and well-being of the Department's tenants, and will make the Development community space available to them on a regularly-scheduled basis to provide outreach services and education to the tenants. The Development Owner may contact service providers on the Department list or contact other providers that serve the general area in which the Development is located.

If the development's LURA requires this the monitors will look for additional information when conducting a monitoring review to evidence the additional point requirement has been met.

18

What Supportive Services are to be provided?

Supportive Services

Throughout the Compliance Period, unless otherwise permitted by the Department, the Project Owner has contracted for the provision of the following special supportive services that would not otherwise be available to Tenants: **Financial Planning Assistance, Health Screening Services, Health & Nutritional Courses**

At the time this Declaration is filed, the organization(s) providing **Healthcare**

The Project Owner shall notify the Department (i) of any change in the organization(s) providing the services and (ii) if such organization is proposed to be replaced.

PROVISION OF SUPPORTIVE SERVICES

The Development Owner has been awarded points based on providing a combination of special supportive services appropriate for the proposed tenants through the Extended Use Period. The Development Owner may change, from time to time, the services offered; however, the overall points must remain the same. **No rent or fees may be charged to the tenant for providing these services.** Services must be provided on-site or transportation to off-site services must be provided, there must be adequate space for the intended services, and services offered should be accessible to all. Tenants must be provided written notice of the elections made by the Development Owner. Owner must provide at a **minimum 9 total points worth of services (maximum of 9 points; 10 for a Supportive Housing Development qualifying under the Nonprofit Set-Aside)** from the following list (the same service may not be used for more than one scoring item):

- partnership with local law enforcement to provide quarterly on-site social and interactive activities intended to foster relationships with residents (such activities could include playing sports, having a cook-out, swimming, card games, etc.) (3 points);
- weekday character building program (shall include at least on a monthly basis a curriculum based character building presentation on relevant topics (i.e. teen dating violence, drug prevention, bullying, teambuilding, internet/social media dangers, stranger danger, etc.)) (2 points);
- daily transportation (i.e. bus passes, cab vouchers, specialized van on-site) (4 points);
- Food pantry consisting of an assortment of non-perishable food items and common household items (i.e., laundry detergents, toiletries, etc.) accessible to residents at least on a monthly basis or upon request by a tenant (1 point);
- GED preparation classes (shall include an instructor providing on-site coursework and exam) (2 points);
- English as a second language classes (shall include an instructor providing on-site coursework and exam) (1 point);
- quarterly financial planning courses (i.e. homebuyer education, credit counseling, investing advice, retirement plans, etc.). Courses must be offered through an on-site instructor; a CD-Rom or online course is not acceptable (1 point);
- annual health fair provided by a health care professional (1 point);
- quarterly health and nutritional courses (1 point);
- organized youth programs or other recreational activities such as games, movies, or crafts offered by the Development (1 point);
- scholastic tutoring (shall include daily Monday – Thursday homework help or other focus on academics) (3 points);
- Notary Services during regular business hours (§2306.6710(b)(3) of the Act) (1 point);
- weekly exercise classes (offered at times when most residents would be likely to attend) (2 points);

Where are the Supportive Services to be held?

PROVISION OF SUPPORTIVE SERVICES/PROVISION OF TENANT SERVICES

The Development Owner has been awarded points based on providing a combination of special supportive services appropriate for the proposed tenants through the Extended Use Period. The Development Owner may change, from time to time, the services offered; however, the overall points must remain the same. **No rent or fees may be charged to the tenant for providing these services.** Services must be provided on-site or transportation to off-site services must be provided, there must be adequate space for the intended services, and services offered should be accessible to all. Tenants must be provided written notice of the elections made by the Development Owner. Owner must provide at a **minimum _____ total points worth of services (maximum of 9 points; 10 for a Supportive Housing Development proposed by a Qualified Nonprofit)** from the following list (the same service may not be used for more than one scoring item):

When are the Supportive Services to be held?

- partnership with local law enforcement to provide quarterly on-site social and interactive activities intended to foster relationships with residents (such activities could include playing sports, having a cook-out, swimming, card games, etc.) (3 points);
- weekday character building program (shall include at least on a monthly basis a curriculum based character building presentation on relevant topics (i.e. teen dating violence, drug prevention, bullying, teambuilding, internet/social media dangers, stranger danger, etc.)) (2 points);
- daily transportation (i.e. bus passes, cab vouchers, specialized van on-site) (4 points);
- Food pantry consisting of an assortment of non-perishable food items and common household items (i.e., laundry detergents, toiletries, etc.) accessible to residents at least on a monthly basis or upon request by a tenant (1 point);
- GED preparation classes (shall include an instructor providing on-site coursework and exam) (2 points);
- English as a second language classes (shall include an instructor providing on-site coursework and exam) (1 point);
- quarterly financial planning courses (i.e. homebuyer education, credit counseling, investing advice, retirement plans, etc.). Courses must be offered through an on-site instructor; a CD-Rom or online course is not acceptable (1 point);
- annual health fair provided by a health care professional (1 point);
- quarterly health and nutritional courses (1 point);
- organized youth programs or other recreational activities such as games, movies, or crafts offered by the Development (1 point);
- scholastic tutoring (shall include daily Monday – Thursday homework help or other focus on academics) (3 points);
- Notary Services during regular business hours (§2306.6710(b)(3) of the Act) (1 point);
- weekly exercise classes (offered at times when most residents would be likely to attend) (2 points);

21

How Long do Supportive Services Have to be Provided?

- Social Services must be provided as long as the LURA requires.
 - Throughout the Compliance Period...
 - If the Compliance Period has been extended then Services must be offered throughout.
 - Throughout the Extended Use Period...

Supportive Services
 Throughout the Compliance Period, unless otherwise permitted by the Department, a Local Tax Exempt Organization shall provide the following special supportive services that would not otherwise be available to the tenants: Health and wellness services.

PROVISION OF SUPPORTIVE SERVICES

The Development Owner has been awarded points based on providing a combination of special supportive services appropriate for the proposed tenants through the Extended Use Period. The Development Owner may change, from time to time, the services offered; however, the overall points must remain the same. **No rent or fees may be charged to the tenant for providing these services.**

22

How Long do Supportive Services Have to be Provided? Cont.

- Social Services must be provided as long as the LURA requires.
 - Throughout the Compliance Period...
 - If the Compliance Period has been extended then Services must be offered throughout.

Supportive Services
 Throughout the Compliance Period, unless otherwise permitted by the Department, a Local Tax Exempt Organization shall provide the following special supportive services that would not otherwise be available to tenants: Computer labs, tutoring, job & educational enrichment, stress management, resource library, neighborhood security, and health promotion.
 At the time this Declaration is filed, the organization(s) providing these services is Beacon Enterprises, Inc.

Longer Compliance Period and Extended Use Period
 The Compliance Period shall be a period of 25 consecutive taxable years and the Extended Use Period shall be a period of 40 consecutive taxable years, each commencing with the first year of the Credit Period.

LURA: BOND Resident Supportive Services

EXHIBIT C
TENANT SUPPORT SERVICES

Child Care
 Transportation
 Basic Adult Education
 Legal Assistance
 Counseling Services
 GED Preparation
 English as a Second Language Classes
 Vocational Training
 Home Buyer Education
 Credit Counseling
 Financial Planning Assistance or Courses
 Health Screening Services
 Health and Nutritional Courses
 Youth Programs
 Scholastic Tutoring
 Social Events and Activities
 Community Gardens
 Computer Facilities

Any other program described under Title IV-A of the Social Security Act (42 U.S.C. Section 601 et seq.) which enables children to be cared for in their homes or the homes of relatives; ends the dependence of needy families on government benefits by promoting job preparation, work and marriage; prevents and reduces the incidence of out-of-wedlock pregnancies; and encourages the formation and maintenance of two-parent families, and

Any other services approved in writing by the Issuer.

The Program Plan for tenant supportive services submitted for review and approval of the Issuer, must contain a plan for coordination of services with state workforce project and welfare programs. The coordinated effort will vary depending upon the needs of the tenant profile at any given time as outlined in the Program Plan.

EXHIBIT C
TENANT SUPPORTIVE SERVICES

The tenant supportive services to be provided must include at least eight (8) points selected from the following list which are grouped primarily for organizational purposes. The Borrower is not required to select a specific number of services from each section. The Borrower may change, from time to time, the services offered; however, the overall points as selected at Application must remain the same. Should the Governmental Lender's rules in subsequent years provide different services than those listed below, the Borrower may be allowed to select services listed therein upon written consent from the Governmental Lender, and any services selected must be of similar value to the service the Borrower is intending to replace. The services provided should be those that will directly benefit the Target Population of the Development. Tenants must be provided written notice of the elections made by the Borrower.

(A) Transportation Supportive Services include:

- (i) shuttle, at least three days a week, to a grocery store and pharmacy or a major, big-box retailer that includes a grocery store and pharmacy, OR a daily shuttle, during the school year, to and from nearby schools not served by a school bus system for children who live at the Development (3.5 points); and
- (ii) monthly transportation to community/social events such as mall trips, community theatre, bowling, organized tours, etc. (1 point).

(B) Children Supportive Services include:

- (i) provide a High Quality Pre-Kindergarten (HQ Pre-K) program and associated educational space at the Development Site meeting the requirements of §11.101(b)(5)(C)(i)(D). (Half of the points required under §11.101(b)(7)); and
- (ii) Twelve hours of weekly, organized, on-site services provided to K-12 children by a dedicated service coordinator or third-party entity. Services include after-school and summer care and tutoring, recreational activities, character building programs, mentee opportunities, test preparation, and similar activities that promote the betterment and growth of children and young adults (3.5 points).

(C) Adult Supportive Services include:

- (i) Four hours of weekly, organized, on-site classes provided to an adult audience by persons skilled or trained in the subject matter being presented, such as English as a second language classes, computer training, financial literacy courses, health education courses, certification courses, GED preparation classes, resume and interview preparatory classes, general presentations about community services and resources, and any other course, class, or presentation that may equip residents with new skills that they may wish to develop (3.5 points);

LURA: BOND Resident Supportive Services

(g) that (A) the Owner is a "housing sponsor" as defined in the Act and will comply with all applicable requirements of the Act, including submitting the Housing Sponsor Report to the Issuer via the electronic filing system available on the Issuer's website and in the form available on the Issuer's website at the time of such submission by March 1 of each year, commencing March 1, 2007, together with a summary of social service programs which must be chosen from the list of Tenant Supportive Services attached hereto as Exhibit C (the "Program Plan") provided by the Owner for the Owner's prior fiscal year and planned tenant programs which must be chosen from the list of Tenant Supportive Services attached hereto as Exhibit C for the following fiscal year, which Program Plan is subject to review and approval by the Issuer and (B) the Owner will perform and provide the services set forth in the Program Plan; provided, however, the first Program Plan shall not be required to be submitted until the date of completion of the Development; and (C) the Owner will expend at least \$7 per unit per month on Tenant Support Services listed on Exhibit C.

(h) to provide social services which must meet the minimum point requirement and be chosen from the list of Tenant Supportive Services attached hereto as Exhibit C in the manner provided in such Exhibit, or from any additional supportive services added to the Governmental Lender's rules at any future date that are of similar value to the service it is intending to replace as agreed to in writing by the Governmental Lender. The Borrower must maintain documentation satisfactory to the Governmental Lender of social services provided and such documentation will be reviewed during onsite visits beginning with the second onsite review and must be submitted to the Governmental Lender upon request. The Borrower must provide the social services throughout the State Restrictive Period;

LURA: HOME Resident Supportive Services

(VI) Electric Vehicle Charging Station (0.5 points); and
 (VII) An Impact Isolation Class ("IC") rating of at least 55 and a Sound Transmission Class ("STC") rating of 60 or higher in all units, as certified by the architect or engineer of record (3 points)
 (VIII) Green Building Features. Points under this item are intended to promote energy and water conservation, operational savings and sustainable building practices. Points may be selected from only one of three categories: Enterprise Green Communities, Leadership in Energy and Environmental Design (LEED), and ICC 700 National Green Building Standard. A Development may qualify for no more than four (4) points total under this subclause. If the Development involves scattered sites, there must be green building features incorporated into each site in order to qualify for these points.
 (a) Enterprise Green Communities. The Development must incorporate all mandatory and optional items applicable to the construction type (i.e., New Construction, Rehabilitation, etc.) as provided in the most recent version of the Enterprise Green Communities Criteria found at <http://www.greencommunitiesonline.org/>;
 (b) LEED. The Development must incorporate, as a minimum, all of the applicable criteria necessary to obtain a LEED Certification, regardless of the rating level achieved (i.e., Certified, Silver, Gold or Platinum).
 (c) ICC/ASHRAE - 700 National Green Building Standard. The Development must incorporate, as a minimum, all of the applicable criteria necessary to obtain a NGBS Green Certification, regardless of the rating level achieved (i.e., Bronze, Silver, Gold, or Emerald).

Resident Supportive Services

The Development Owner must provide a minimum of ten (10) points, nine (9) of which must be from the list of services in A through Z of this section. One (1) point must be met in accordance with 10 TAC §12.902(3)(3), with the Development Owner required to contact local nonprofit and governmental providers of services that would support the health and well-being of the Department's tenants. The Development Owner will make Development community space available to them on a regularly-scheduled basis to provide outreach services and education to the tenants. The Development Owner may contact service providers on the Department list, or contact other providers that serve the general area in which the Development is located. The points selected and complete list of supportive services will be included in the LURA and the timeframe by which services are offered must be in accordance with 10 TAC §10.619 (relating to Monitoring for Social Services) and maintained throughout the Affordability Period.

The Owner may change, from time to time, the services offered; however, the overall points as selected at Application must remain the same. The services provided should be those that will directly benefit the Target Population of the Development. Residents must be provided written notice of the elections made by the Development Owner. No fees may be charged to the residents for any of the services, there must be adequate space for the intended services and services offered should be accessible to all (e.g. exercise classes must be offered in a manner that would enable a person with a disability to participate). Services must be provided on-site or transportation to those off-site services identified on the list must

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 Page 17 of 41

Resident SUPPORTIVE SERVICES

The Development Owner must provide a minimum of ten (10) points, nine (9) of which must be from the list of services in A through Z of this section. One (1) point must be met in accordance with 10 TAC §11.9(c)(3)(B), with the Development Owner required to contact local nonprofit and governmental providers of services that would support the health and well-being of the Department's tenants. The Development Owner will make Development community space available to them on a regularly-scheduled basis to provide outreach services and education to the tenants. The Development Owner may contact service providers on the Department list, or contact other providers that serve the general area in which the Development is located. The points selected and complete list of supportive services will be included in the LURA and the timeframe by which services are offered must be in accordance with 10 TAC §10.619 (relating to Monitoring for Social Services) and maintained throughout the Affordability Period.

The Owner may change, from time to time, the services offered; however, the overall points as selected at Application must remain the same. The services provided should be those that will directly benefit the Target Population of the Development. Residents must be provided written notice of the elections made by the Development Owner. No fees may be charged to the residents for any of the services, there must be adequate space for the intended services and services offered should be accessible to all (e.g. exercise classes must be offered in a manner that would enable a person with a disability to participate). Services must be provided on-site or transportation to those off-site services identified on the list must

LURA: HOME Resident Supportive Services

be provided. The same service may not be used for more than one scoring item. These services are intended to be provided by a qualified and reputable provider in the specified industry such that the experience and background of the provider demonstrates sufficient knowledge to be providing the service. In general, on-site leasing staff or property maintenance staff would not be considered a qualified provider. Where applicable, the services must be documented by a written agreement with the provider. Unless otherwise noted in a particular clause, courses and services must be offered by an onsite instructor(s).

- (i) Transportation Supportive Services
 - (i) Shuttle, at least three days a week, to a grocery store and pharmacy and/or a major, big-box retailer that includes a grocery store and pharmacy, OR a daily shuttle, during the school year, to and from nearby schools not served by a school bus system for children who live at the Development (3.5 points);
 - (ii) Monthly transportation to community/social events such as mall trips, community theatre, bowling, organized tours, etc. (1 point);
- (ii) Children Supportive Services
 - (i) Provide a High Quality Pre-Kindergarten (HQ Pre-K) program and associated educational space at the Development Site meeting the requirements of 10 TAC §11.101(b)(5)(C)(i)(i). (Half of the points required under 10 TAC §11.101(b)(7));
 - (ii) 12 hours of weekly, organized, on-site services provided to K-12 children by a dedicated service coordinator or third-party entity. Services include after-school and summer care and tutoring, recreational activities, mentee opportunities, test preparation, and similar activities that promote the betterment and growth of children and young adults (3.5 points);
- (iii) Adult Supportive Services
 - (i) 4 hours of weekly, organized, on-site classes provided to an adult audience by persons skilled or trained in the subject matter being presented, such as character building programs, English as a second language classes, computer training, financial literacy courses, health education courses, certification courses, GED preparation classes, resume and interview preparatory classes, general presentations about community services and resources, and any other course, class, or presentation that may equip residents with new skills that they may wish to develop (3.5 points);
 - (ii) Annual income tax preparation (offered by an income tax prep service) or IRS-certified VITA (Volunteer Income Tax Assistance) program (offered by a qualified individual) that also emphasizes how to claim the Earned Income Tax Credit (1 point);
 - (iii) Contracted career training and placement partnerships with local workforce offices, culinary programs, or vocational counseling services; also resident training programs that train and hire residents for job opportunities inside the development in areas like leasing, tenant services, maintenance, landscaping, or food and beverage operation (2 points).

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Page 38 of 40

be provided. The same service may not be used for more than one scoring item. These services are intended to be provided by a qualified and reputable provider in the specified industry such that the experience and background of the provider demonstrates sufficient knowledge to be providing the service. In general, on-site leasing staff or property maintenance staff would not be considered a qualified provider. Where applicable, the services must be documented by a written agreement with the provider. Unless otherwise noted in a particular clause, courses and services must be offered by an onsite instructor(s).

- (i) Transportation Supportive Services
 - (i) Shuttle, at least three days a week, to a grocery store and pharmacy and/or a major, big-box retailer that includes a grocery store and pharmacy, OR a daily shuttle, during the school year, to and from nearby schools not served by a school bus system for children who live at the Development (3.5 points);
 - (ii) Monthly transportation to community/social events such as mall trips, community theatre, bowling, organized tours, etc. (1 point);
- (ii) Children Supportive Services
 - (i) Provide a High Quality Pre-Kindergarten (HQ Pre-K) program and associated educational space at the Development Site meeting the requirements of 10 TAC §11.101(b)(5)(C)(i)(i). (Half of the points required under 10 TAC §11.101(b)(7));
 - (ii) 12 hours of weekly, organized, on-site services provided to K-12 children by a dedicated service coordinator or third-party entity. Services include after-school and summer care and tutoring, recreational activities, mentee opportunities, test preparation, and similar activities that promote the betterment and growth of children and young adults (3.5 points);

LURA: HOME-ARP Resident Supportive Services

- (IV) Energy-Star or equivalently rated ceiling fans in all Bedrooms (0.5 points);
- (V) EPA WaterSense or equivalent qualified toilets in all bathrooms (0.5 points);
- (VI) EPA WaterSense or equivalent qualified showerheads and faucets in all bathrooms (0.5 points);
- (VII) 15 SEER HVAC;
- (VIII) 16 SEER HVAC, for New Construction, Reconstruction, or Rehabilitation (1.5 points); and
- (IX) A rainwater harvesting/collection system and/or locally approved greywater collection system (0.5 points);
- (X) WiFi enabled, Energy-Star or equivalently rated "smart" thermostats installed in all units (1 point); and
- (XI) Solar panels installed, with a sufficient number of panels to reach a rated power output of at least 300 watts for each Low-Income Unit (2 points).

RESIDENT SUPPORTIVE SERVICES

The Development must include sufficient Resident Supportive Services to qualify for at least a minimum of four (4) points, as selected at Application pursuant to 10 TAC §11.101(b)(7). The supportive services include those listed in subparagraphs (A) - (E) of this paragraph, which are grouped primarily for organizational purposes. Applicants are not required to select a specific number of services from each section. The points selected and complete list of supportive services are provided in this section and must be maintained under this Contract throughout the Affordability Period or Contract Period, whichever is longer. Moreover, the points selected and complete list of supportive services will be required to be identified in the LURA and the timeframe by which services are offered must be in accordance with 10 TAC §10.619 (relating to Monitoring for Social Services) and maintained under the LURA as required therein.

The Owner may change, from time to time, the services offered; however, the overall points as selected at Application must remain the same. A Development Owner may be required to substantiate such service(s) if requested by staff. Should the Qualified Allocation Plan in subsequent years provide different services than those listed in (A) - (E) below, the Development Owner may request an Amendment as provided in 10 TAC §10.405(a)(2). The services provided should be those that will directly benefit the Target Population of the Development. Residents must be provided written notice of the elections made by the Development Owner. No fees may be charged to the residents for any of the services, there must be adequate space for the intended services and services offered should be accessible to all (e.g. exercise classes must be offered in a manner that would enable a person with a disability to participate). Services must be provided on-site or transportation to those off-site services identified on the list must be provided. The same service may not be used for more than one scoring item. These services are intended to be provided by a qualified and reputable provider in the specified industry such that the experience and background of the provider demonstrates sufficient knowledge to be providing the service. In general, on-site leasing staff or property maintenance staff would not be considered a qualified provider. Where applicable, the services must be documented by a written agreement with the provider. Unless otherwise noted in a particular clause below, courses and services must be offered by an onsite instructor(s).

HOME-ARP MULTIFAMILY RENTAL HOUSING PROGRAM
HOME-ARP CONTRACT

ADDENDUM C

RESIDENT SUPPORTIVE SERVICES

The Development must include sufficient Resident Supportive Services to qualify for at least a minimum of four (4) points, as selected at Application pursuant to 10 TAC §11.101(b)(7). The supportive services include those listed in subparagraphs (A) - (E) of this paragraph, which are grouped primarily for organizational purposes. Applicants are not required to select a specific number of services from each section. The points selected and complete list of supportive services are provided in this section and must be maintained under this Contract throughout the Affordability Period or Contract Period, whichever is longer. Moreover, the points selected and complete list of supportive services will be required to be identified in the LURA and the timeframe by which services are offered must be in accordance with 10 TAC §10.619 (relating to Monitoring for Social Services) and maintained under the LURA as required therein.

The Owner may change, from time to time, the services offered; however, the overall points as selected at Application must remain the same. A Development Owner may be required to substantiate such service(s) if requested by staff.

- (A) Transportation Supportive Services include:
 - (i) shuttle, at least three days a week, to a grocery store and pharmacy and/or a major, big-box retailer that includes a grocery store and pharmacy, OR a daily shuttle, during the school year, to and from nearby schools not served by a school bus system for children who live at the Development (3.5 points);
 - (ii) monthly transportation to community/social events such as mall trips, community theatre, bowling, organized tours, etc. (1 point);
- (B) Children Supportive Services include:
 - (i) provide a High Quality Pre-Kindergarten (HQ Pre-K) program and associated educational space at the Development Site meeting the requirements of 10 TAC §11.101(b)(5)(C)(i)(i). (Half of the points required under 10 TAC §11.101(b)(7));
 - (ii) Twelve hours of weekly, organized, on-site services provided to K-12 children by a dedicated service coordinator or third-party entity. Services include after-school and summer care and tutoring, recreational activities, character building programs, mentee opportunities, test preparation, and similar activities that promote the betterment and growth of children and young adults (3.5 points);
- (C) Adult Supportive Services include:
 - (i) Four hours of weekly, organized, in-person, hybrid, or live virtual classes accessible to participants from a common area on site to an adult audience by persons skilled or trained in the subject matter

LURA: NHTF Resident Supportive Services

TENANT SUPPORTIVE SERVICES

The Development Owner must provide a minimum of eight (8) points. The points selected and complete list of supportive services will be included in the LURA and the timeframe by which services are offered must be in accordance with §10.619 of this chapter (relating to Monitoring for Social Services) and maintained throughout the Affordability Period. The Owner may change, from time to time, the services offered; however, the overall points as selected at Application must remain the same. The services provided should be those that will directly benefit the Target Population of the Development. Tenants must be provided written notice of the elections made by the Development Owner. No fees may be charged to the tenants for any of the services; there must be adequate space for the intended services and services offered should be accessible to all (e.g. exercises classes must be offered in a manner that would enable a person with a disability to participate). Services must be provided on-site or transportation to those off-site services identified on the list must be provided. The same service may not be used for more than one scoring item. These services are intended to be provided by a qualified and reputable provider in the specified industry such that the experience and background of the provider demonstrates sufficient knowledge to be providing the service. In general, on-site leasing staff or property maintenance staff would not be considered a qualified provider. Where applicable, the services must be documented by a written agreement with the provider.

- (A) partnership with local law enforcement to provide quarterly on-site social and interactive activities intended to foster relationships with residents (such activities could include playing sports, having a cook-out, swimming, card games, etc.) (3 points);
- (B) weekly character building program (shall include at least on a monthly basis a curriculum based character building presentation on relevant topics, for example teen dating violence, drug prevention, bullying, teambuilding, internet/social media dangers, stranger danger, etc.) (2 points);
- (C) daily transportation such as bus passes, cab vouchers, specialized van on-site (4 points);
- (D) Food pantry consisting of an assortment of non-perishable food items and common household items (i.e. laundry detergent, toiletries, etc.) accessible to residents at least on a monthly basis or upon request by a tenant. While it is possible that transportation may be provided to a local food bank to meet the requirement of this tenant service, the tenant must not be required to pay for the items they receive at the food bank (1 point);
- (E) GED preparation classes (shall include an instructor providing on-site coursework and exam) (2 points);
- (F) English as a second language classes (shall include an instructor providing on-site coursework and exam) (1 point);
- (G) quarterly financial planning courses (i.e. budgeting education, asset counseling, investing advice, retirement plans, etc.). Courses must be offered through an on-site instructor; a CD or online course is not acceptable (1 point);
- (H) mental health first provided by a health care professional (1 point);
- (I) quarterly health and nutritional courses (1 point);
- (J) organized youth programs or other recreational activities such as games, movies or crafts offered by the Development (1 point);
- (K) schedule tutoring (shall include daily (Monday-Thursday) homework help or other focus on academics) (1 point);
- (L) Nanny Services during regular business hours (2300.67100(A)(3)) (1 point);

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Page 35 of 37

TENANT SUPPORTIVE SERVICES

The Development Owner must provide a minimum of eight (8) points. The points selected and complete list of supportive services will be included in the LURA and the timeframe by which services are offered must be in accordance with §10.619 of this chapter (relating to Monitoring for Social Services) and maintained throughout the Affordability Period. The Owner may change, from time to time, the services offered; however, the overall points as selected at Application must remain the same. The services provided should be those that will directly benefit the Target Population of the Development. Tenants must be provided written notice of the elections made by the Development Owner. No fees may be charged to the tenants for any of the services; there must be adequate space for the intended services and services offered should be accessible to all (e.g. exercises classes must be offered in a manner that would enable a person with a disability to participate). Services must be provided on-site or transportation to those off-site services identified on the list must be provided. The same service may not be used for more than one scoring item. These services are intended to be provided by a qualified and reputable provider in the specified industry such that the experience and background of the provider demonstrates sufficient knowledge to be providing the service. In general, on-site leasing staff or property maintenance staff would not be considered a qualified provider. Where applicable, the services must be documented by a written agreement with the provider.

- (A) partnership with local law enforcement to provide quarterly on-site social and interactive activities intended to foster relationships with residents (such activities could include playing sports, having a cook-out, swimming, card games, etc.) (3 points);
- (B) weekly character building program (shall include at least on a monthly basis a curriculum based character building presentation on relevant topics, for example teen dating violence, drug prevention, bullying, teambuilding, internet/social media dangers, stranger danger, etc.) (2 points);
- (C) daily transportation such as bus passes, cab vouchers, specialized van on-site (4 points);
- (D) Food pantry consisting of an assortment of non-perishable food items and common household items (i.e. laundry detergent, toiletries, etc.) accessible to residents at least on a monthly basis or upon request by a tenant. While it is possible that transportation may be provided to a local food bank to meet the requirement of this tenant service, the tenant must not be required to pay for the items they receive at the food bank (1 point);

Learning Point #2

Supportive Services are only required for the first 15 years. True or false?

Learning Point #3

Supportive Services must be provided on-site or have a transportation option. **True or false?**

31

Learning Point #4

Services offered on-site can be changed anytime the development wishes to change? **True or false?**

32

Learning Point #5

How often does a property have to offer their Supportive Services?

- A. Weekly
- B. Monthly
- C. Quarterly
- D. Yearly
- E. Depends on the LURA

33

How to Implement Supportive Services

- The services must be held free-of-charge to the development's tenants.
 - No rent or fees may be charged to the tenant for providing these services.
- The services must be something that the development's tenants could not readily get on their own.
 - For example, providing YouTube videos to meet the requirement of Adult Education would be insufficient as the households could obtain those videos on their own.
- Keep any documentation used to notify tenants of the services.
 - The Department recommends maintaining an organized binder or digital file to keep documentation of each service offered and the advertising materials for each service.
 - The contract for services, if required, should also be maintained and made available during any monitoring review.

34

How to Document Supportive Services

Maintain documentation to evidence the Services offered

- Newsletters with calendars of events that are sent to the tenants
- Flyers for specific events that are used to advertise the event to the tenants of the development
- Sign-in Sheets must be maintained and available for all events held, even if no one attends

35

Pre-Review Documents

When you receive a notification of a monitoring review (desk or on-site), the notification letter will request that you complete the Monitor Review Questionnaire, this is where the property services should be outlined.

Back-up must then be submitted for the services offered.

What you should submit:

- A list, or the page of the LURA with items noted, of the services provided and submitted;
- Enough flyers and sign-in sheets to evidence that the required service has been offered as is outlined in the LURA;
- Newsletters for the 12-months prior to the review to show the regular offerings of required services.

36

Monitoring Review: Supportive Services

If the LURA requires Supportive Services **Scroll Down**

- Documentation evidencing compliance with all Supportive Service requirements in the Land Use Restriction Agreement (LURA).
 - For example: sign-in-sheets, notices, calendars, schedule of planned/upcoming services, invoices, contracts and ledgers, and the provider’s tax exempt status, if applicable.
- **Upload into CMTS evidence of two current consecutive services for each service provided (example: monthly = 2 months, quarterly =2 quarters, weekly = 2 weeks’ worth, weekday = 2 weeks’ worth).**
- The development may also submit an outline showing the planned services in addition to the back-up for services already held.

37

Examples to Avoid Noncompliance: Monitor Review Questionnaire

Social Services		
87	Does a LURA for the development require the provision of supportive services to tenants? If so, please answer questions lines between 88 through 120. If not, please skip questions lines between 88 through 120.	Yes
88	If this is the development's first monitoring review and not all services can be provided at this time, does the development have a plan to provide services with specific dates?	N/A
89	If so, please submit through the attachment system in CMTS the plan.	
90	Does a LURA for the development require an onsite Notary Public? If so, please submit through the attachment system in CMTS evidence of the Notary Public.	No
91	Does a LURA for the development require the community to make available on a regularly-schedule basis, to a local nonprofit or government provider of services, space to provide outreach services and education to tenants regarding their health and well-being?	No
92	If so, please submit evidence through the attachment system in CMTS.	

38

Examples to Avoid Noncompliance: Monitor Review Questionnaire

93	Does a LURA for the development require a per-unit cost that the Owner must expend monthly?	No
94	If so, how much is expended by the development on a monthly basis? If so, please provide through the attachment system in CMTS evidence of those costs. Please provide information on supportive services as required per a LURA for the development, including required providers. For each services, please submit through the attachment system in CMTS sufficient documentation to evidence the required frequency and scope as indicated in a LURA.	
	Service 1	
95	Provide the name of the service as listed in the LURA.	Credit Counseling
96	What events are being provided?	Credit Counseling vs Debt Settlement; How to get a copy of your credit report; Side effects of bad credit; 5 sneaky way to improve your credit score;
	Service 2	
97	Provide the name of the service as listed in the LURA.	Financial Planning
98	What events are being provided?	Estate Planning; What is zero-based budget? How to stop living paycheck to paycheck
	Service 3	
99	Provide the name of the service as listed in the LURA.	Health and Nutrition Courses
100	What events are being provided?	Preventing High Cholesterol; Arthritis class; How to avoid portion pitfalls
	Service 4	

Newsletters and Calendars

A newsletter and/or a calendar of events sent to the tenants on a monthly basis is a great way to help maintain compliance.

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
	1 Rainbow Fitness 12:30 - 1:15 p.m. Health and Nutrition 1:30 - 2:30 p.m. RSC Knock and Talk *YEP	2 Financial Literacy 1:30 - 2:30 p.m. *YEP	3 GED Online 11 a.m. - 12:45 p.m. *YEP	4 Senior 1:30 - 2:30 p.m. *YEP	5 *YEP	6 *YEP
7 *YEP	8 Rainbow Fitness 12:30 - 1:15 p.m. Computer Training 1:30 - 2:30 p.m. RSC Knock and Talk *YEP	9 Job Readiness 1:30 - 2:30 p.m. Live Youth Academic Support 3 - 4 p.m. *YEP	10 GED Online 11 a.m. - 12:45 p.m. Live Youth Academic Support 3 - 4 p.m. *YEP	11 Holiday *YEP	12 *YEP	13 Android
14	15 Rainbow Fitness 12:30 - 1:15 p.m. Continuing Education 1:30 - 2:30 p.m. RSC Knock and Talk *YEP	16 Housekeeping 1:30 - 2:30 p.m. Live Youth Academic Support 3 - 4 p.m. *YEP	17 GED Online 11 a.m. - 12:45 p.m. Live Youth Academic Support 3 - 4 p.m. *YEP	18 Personal Development 1:30 - 2:30 p.m. *YEP	19 *YEP	20 Apple
21	22	23	24	25 *YEP	26	27
28	29 Resource Center Closed	30 Resource Center Closed	Resource Center Closed	Resource Center Closed	Resource Center Closed	
	31 Rainbow Fitness 12:30 - 1:15 p.m. LEED 1:30 - 2:30 p.m. RSC Knock and Talk *YEP	30 Substance Abuse Awareness 1:30 - 2:30 p.m. Live Youth Academic Support 3 - 4 p.m. *YEP				

Flyers


A flyer for the event sent to the tenants is another way to increase attendance and to evidence to the Department that the Development is advertising for the services offered.

Homebuyer Education Class

Dear Resident,

Whether you are thinking of buying your first home or considering becoming a homeowner again, homebuyer education is a valuable tool that can help you be successful in the home buying journey. Studies find that homeowners who go through homebuyer education are less likely to default on their mortgage.

Pandora Springs will be offering a FREE homebuyer education counseling class!!!



Friday, April 19, 2024
5:30 pm until 6:30 pm;
light snacks provided
Office Clubhouse

Please take advantage of the information and knowledge you will receive at no cost!

- Managing your money
- Understanding your credit
- Obtaining a mortgage loan
- Shopping for a home
- Protecting your investment

41

Sign-In Sheets

Sign-in Sheets from the date of the event must include:

- Date of the event
- Type of service the event is intended to satisfy
- Tenant signatures and applicable unit number
- If no one attends the event the staff and the person conducting the event can sign the sign-in sheet and show that the event was held but no one attended

Sign in Sheet

Date: July 15, 2024 LURA Service Offered: Credit Counseling

Service: How to Repair Your Credit

Tenant Name	Apartment #

42

Common Cause of Noncompliance

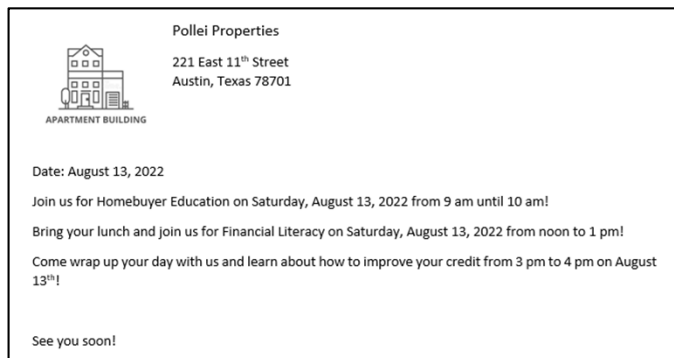
- Each required Service must have an event held to satisfy the requirement. The development may not hold one large event to satisfy multiple LURA requirements.
 - For example; if a development is required to offer Homebuyer Education, Financial Literacy Education and Credit Counseling they must host 3 separate events on 3 different dates. One event held with each item addressed in a different section would not be acceptable.



43

Common Cause of Noncompliance Avoided

An example of hosting multiple events on one day would be to have an event from 9 am until 10 am for Homebuyer Education. Then a second event as a “Brown Bag Lunch and Learn” from 12 pm until 1 pm for Financial Literacy. Finally, a third event on the same day from 3 pm until 4 pm for Credit Counseling. This would allow for clear division between events and would be an acceptable way to offer multiple events on the same day.



44

Learning Point #6

We need to send in evidence of every service EVER offered when there is a monitoring review. **True or false?**

45

What Events Qualify as Supportive Services?

The LURA should outline what events are required as Supportive Services. If you are unsure if an event will qualify as a required service, please reach out to a monitor for assistance.

- For example; if the LURA requires Adult Education as a Supportive Service, the Development must offer something that would be akin to continuing education through an institution of higher education. Offering a class on credit counseling would not satisfy this requirement. Offering a class on expanding accounting knowledge or computer proficiency would be an acceptable service for the requirement of Adult Education.
- Use your best judgement, if it is a “stretch” to satisfy a service with a certain event, please reach out to a monitor and discuss other options and available events that would meet the requirements of the LURA.

46

When Does Monitoring of Services Begin?

The Department will monitor for compliance with the Supportive Service provision starting with the first monitoring review.

- If it is the first monitoring review, the Department will review services offered, or the development's plan of services with specific dates outlined.
- All other reviews will require evidence of services submitted with the pre-review documentation.
- If required per the LURA, evidence must be submitted that the development made available, on a regularly scheduled basis, to local non-profit and government providers of services, space to provide outreach services and education to tenants regarding their health and well-being.

47



THANK YOU!

Monitoring for Social Services

PLEASE SEE THE FULL RULE AND REQUIREMENTS ONLINE AT
[HTTPS://WWW.TDHCA.TEXAS.GOV/COMPLIANCE-MANUALS-AND-RULES](https://www.tdhca.texas.gov/compliance-manuals-and-rules).

ADDITIONALLY, NEVER HESITATE TO REACH OUT TO A MONITOR WITH QUESTIONS OR FOR ASSISTANCE, WE ARE HAPPY TO HELP.

[HTTPS://WWW.TDHCA.TEXAS.GOV/COMPLIANCE-DIVISION-STAFF](https://www.tdhca.texas.gov/compliance-division-staff)



TEXAS DEPARTMENT OF HOUSING AND COMMUNITY AFFAIRS