



**2013 Annual Awards Entry Form**  
(Complete one for each entry.)

**Entry Name** Florida Housing's Link Initiative Creates Integrated Permanent Supportive Housing

**HFA** Florida Housing Finance Corporation

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Entry form with description, check(s), and visual aids (optional) must be received by NCSHA by Monday, July 1, 2013.

Use this header on the upper right corner of each page.

HFA \_\_\_\_\_

Entry Name \_\_\_\_\_

Communications	Homeownership	Legislative Advocacy	Management Innovation
<input type="checkbox"/> Annual Report <input type="checkbox"/> Promotional Materials and Newsletters <input type="checkbox"/> Creative Media	<input type="checkbox"/> Empowering New Buyers <input type="checkbox"/> Home Improvement and Rehabilitation <input type="checkbox"/> Encouraging New Production	<input type="checkbox"/> Federal Advocacy <input type="checkbox"/> State Advocacy	<input type="checkbox"/> Financial <input type="checkbox"/> Human Resources <input type="checkbox"/> Operations <input type="checkbox"/> Technology
Rental Housing	Special Needs Housing	Special Achievement	Are you providing visual aids?
<input type="checkbox"/> Multifamily Management <input type="checkbox"/> Preservation and Rehabilitation <input type="checkbox"/> Encouraging New Production	<input type="checkbox"/> Combating Homelessness <input checked="" type="checkbox"/> Housing for Persons with Special Needs	<input type="checkbox"/> Special Achievement	<input checked="" type="checkbox"/> YES <input type="checkbox"/> NO

## **Florida Housing's Link Initiative Creates Integrated Permanent Supportive Housing**

Since 2009, Florida Housing Finance Corporation has created 1,326 units of permanent supportive housing integrated into mixed income, mixed population developments throughout Florida Housing's portfolio through the Link to Permanent Housing Initiative, or Link. The key to the success of the initiative is its coordination with service agencies at the state and local level and its simplicity of implementation.

### **Link Is Innovative**

Florida Housing implements this integrated housing strategy using its existing rental housing delivery system. Developers set aside a portion of rental units at each property for persons receiving services from local supportive service agencies. Florida Housing's partnerships with state agencies, such as Florida Departments of Children and Families, Elder Affairs, and Veterans Affairs, have been instrumental to this initiative. Link units serve extremely low income (ELI) populations with special needs targeted by Florida Housing as a result of ongoing dialogue with stakeholders, specifically: youth aging out of foster care; persons with disabilities, including frail elders; survivors of domestic violence; and homeless persons. Developers commit to maintain the special targeting and affordability of these units for the full affordability period of the properties, typically 50 years.

### **How Link Is Implemented**

To create Link units, Florida Housing originally offered scoring incentives to for-profit and non-profit developers that apply for 9% Low Income Housing Tax Credits to build or preserve developments serving families and elders. Developers must set aside 10 percent of a property's units for ELI residents, and at least 50 percent of a property's ELI units must be for Link households. These are households referred by a supportive services lead entity that serves the community where the development is located. As of 2013, Link is no longer an incentive for the developer, but a requirement.

State agencies designate the appropriate local supportive service agencies that will partner with developers to refer special needs households to Link units. A development chooses which target population(s) will be served after credit underwriting and during the construction. The developer executes a Memorandum of Understanding (MOU) with the appropriate local referral agency that outlines each partner's roles and responsibilities. The MOU must be executed by a deadline established in the Carryover Allocation Agreement. A sample MOU is attached.

To implement the initiative, Florida Housing worked with state agencies and stakeholders that serve these populations to determine the supportive service entities that would be the most feasible to conduct the referral agency roles and responsibilities. Once identified, Florida Housing's supportive housing staff worked with stakeholders, including advocacy groups, to promote Link and to encourage the appropriate lead agencies to serve as a referral agency in their area. The technical aspect of the affordable housing delivery system was a new "language" for them, requiring education on property management concerns and tax credit requirements.

At the start of the initiative, Florida Housing provided assistance to developers to overcome any barriers they faced in getting started. Florida Housing helped them overcome the myths and stereotypes surrounding supportive housing and made sure they understood that residents of Link units must sign a standard lease and pay rent the same as any tenant in any apartment building. The only difference is that the resident of permanent supportive housing has access to supportive services to assist them in

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staying in their housing. This access has brought "peace of mind" to the property managers; they realize these tenants will have assistance in addressing tenancy issues or concerns that may arise.

**Link Is Replicable**

Florida Housing used concepts from a model set up by the North Carolina Department of Health and Human Services in partnership with others, including the NCHFA, to begin discussions with Florida stakeholders to create the Link Initiative for Florida. Florida's ultimate approach is different from North Carolina's, but the Link model is replicable in other states. It relies on rental housing programs that already exist, developers that are active participants in these programs, and state agency partners and designated referral agencies that are already administering the appropriate services to special needs households. The local service providers are responsible for outreach and referrals to housing, relationships with property managers, and coordination and delivery of best practice community-based housing supportive services. Located throughout the state, the referral agencies are critical to the program's success.

**Link Effectively Employs Partnerships**

Link has facilitated greater collaboration and partnerships among affordable housing and supportive providers at the state and local levels. Through this initiative, Florida Housing has also forged or enhanced already productive partnerships with state agencies, stakeholders such as the Florida Supportive Housing Coalition, and supportive service agencies across the State that serve these targeted populations. Without strong partnerships, the initiative would not be as successful as it has been.

**Link Responds to an Important State Housing Need**

The numbers clearly identify the need for housing for people with special needs. Many of these households have very limited incomes, and they need financial assistance and/or supportive services to live stable and self-sufficient lives in their communities. Data prepared for Florida Housing through a triennial rental needs study show 93,438 cost burdened renter households that receive disability-related benefits. Another 42,186 cost-burdened, low-income renter households are not receiving these benefits but have a household member in need of independent living services or skills.

For youth aging out of foster care, Florida Department of Children and Families identified 5,052 young people in 2012 who were eligible for services. Of these, 2,091 were receiving services under the program. For survivors of domestic violence, during 2011-2012 Florida's domestic violence centers provided emergency shelter to an estimated 8,419 households.

On the homeless front, the 2012 Florida point-in-time homeless count reported 73,624 homeless individuals and families. As part of this count, 7,750 homeless people reported severe mental illness and 7,929 reported chronic substance abuse problems (there is likely some overlap).

This information does not include individuals living in group homes, nursing homes, and correctional facilities who could make the transition into regular housing units if a combination of affordable rental housing and supportive services were in place.

**Link Is an Effective Use of the State's Resources**

Florida Housing implements the Link Initiative through an existing program and with existing developers and supportive service agencies. Florida Housing provides the development funding and the referral agencies provide the supportive services through their funding streams. More staff time was required

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to get the initiative off the ground; however, the simplicity of the approach, combined with the extraordinary need for affordable rentals for these households, have made implementation of the initiative relatively painless for Florida Housing. Partner state and local agencies are delighted with additional resources for their consumers.

Property owners and managers have accepted the initiative with little complaint, again because the Link process is simple, takes very little time to implement, and their Link tenants are proving to be reasonable residents.

The Link Initiative is helping the state meet several important policy objectives, including preventing and reducing homelessness and unnecessary institutionalization among a cross-disability population. By having units set aside for special needs populations in each Florida Housing funding cycle, units have been generated quickly and efficiently across the state.

**Link Provides Measurable Benefits to HFA Targeted Customers**

Households served through Link are given the opportunity to live in newly constructed or substantially rehabilitated, modern apartments at a significantly reduced rent with appropriate services that assist them to be independent and stable. Units are now available in 29 out of 67 counties across the state, from large urban centers to small rural counties. Florida Housing targets financing to apartments that are close to public transit, grocery stores, medical facilities, schools, senior centers, parks and libraries. Living in proximity to these amenities provides Link residents the choice and opportunity they desire to live full lives.

**Link Benefits Outweigh the Costs**

Link provides an integrated permanent supportive housing model that facilitates diversion for many persons with disabilities from more costly, restrictive living environments such as group homes, ALFs and nursing homes. Recent studies show that when high risk homeless adults are living in permanent housing and also have coordinated supportive services, emergency room visits, in-patient hospital visits, and hospital days decrease significantly. In 2014 Florida Housing expects to begin evaluation of how the Link Initiative has assisted the state in diverting residents into lower cost, higher quality homes.

**Link Has a Proven Track Record of Success in the Marketplace**

Developers utilizing the Link program sign formal partnership agreements with local service providers who refer households receiving services to the participating properties. The developers and property managers report no problem in leasing up their units, and report that having a social service provider that is familiar with the household's issues is reassuring when housing a special needs tenant.

**Link Achieves Strategic State and National Objectives**

The Link Initiative has not only provided a desperately needed, more predictable source of units for these consumers, it has also created excitement and a shared sense of the state's ability to respond to the housing needs of these residents. The initiative has been a critical catalyst in forging stronger state partnerships. The Link Initiative is a strategy that has strongly resonated with the Governor and Legislature as part of a comprehensive solution to pool housing and services resources to support people with special needs to be able to live in the least restrictive community setting, and save the state money in doing so. Florida's 2013 Legislature appropriated funding to finance the development of additional Link units, specifying the initiative by name in the legislation. The Link model increases the housing options and choices for those people who face the most complex challenges, and helps them to live with stability, autonomy and dignity.

## The Link Initiative Sample MOU

### Memorandum of Understanding For Special Needs Housing Services

This Memorandum of Understanding for Special Needs Housing Services (the "MOU") is entered into as of this \_\_\_ day of \_\_\_\_\_, 2011 between \_\_\_\_\_ (the "Owner") and \_\_\_\_\_, (the "Referral Agency").

#### RECITALS:

A. In response to Florida Housing Finance Corporation's ("FHFC") Request For Proposal entitled: \_\_\_\_\_, the Owner obtained funding for the development of an affordable housing project located in \_\_\_\_\_, Florida known as \_\_\_\_\_ and consisting of \_\_\_\_\_  
(County) (Name of Development)  
apartment units (the "Project").

B. Owner committed to set-aside fifty percent (50%) (\_\_\_ units) of the required Extremely Low-Income ("ELI") units in the Project, for "Special Needs Household(s)," which is defined by FHFC as households consisting of a Family that is considered to be Homeless, a survivor of Domestic Violence, a Person with a Disability or Youth Aging Out Of Foster Care. [SAMPLE NOTE: A Special Needs Household served may depend on the Special Needs Household Referral Agency(s) the Owner selects to execute an MOU with. For example, on Referral Agency may work with all categories of homeless households, while another Referral Agency may specifically serve persons with developmental disabilities.]

C. FHFC has determined that that Special Needs Households require initial, intermittent or on-going supportive services from one or more community based service providers so that stable, adequate and safe housing is maintained in the community.

D. The Owner desires to engage the Referral Agency's services as more particularly described herein in connection with the Special Needs Households at the Project and in working with the community's supportive service providers to find eligible tenants.

Accordingly the parties agree as follows:

1. Contract Form. This MOU in intended to constitute the entire agreement between the parties and they intend this MOU to be binding upon the parties in the absence of any other agreement. Amendments to this agreement shall only be considered in effect if executed by both parties.

2. ELI Special Needs Household Candidate. The parties agree that Special Needs Households targeted for the ELI units in the Project should be (i) receiving community based supportive services at the time of the referral to the Referral Agency; (ii) prepared to live in an independent living environment; and (iii) able to pay the determined rent and other costs for the available ELI unit. The parties acknowledge that some of the Special Needs Households may require regular and long-term community based supportive services during their tenancy, while others may need only temporary or short-term support to address a situational crisis or to receive assistance to regain independence and stability.

It is understood that all prospective Special Need Household candidates are otherwise bound by the Project's residential application process, rules, regulations and lease provisions, and the applicable sections of Section 42 of the Internal Revenue Code, as well as any FHFC regulations or criteria as they apply to the processing, approval and lease terms of prospective and existing residents.

3. Referral Agency's Target Population. Referral Agency has informed Owner that it has experience in working with homeless, veterans, low income elderly, and those suffering mental illness and, therefore, will be expected to process, screen and accept referrals only in that designated special needs population. ]SAMPLE NOTE: The target population for each respective Referral Agency will be described in this section.]

4. Referral Agency's Responsibilities. The Referral Agency shall be responsible for the following services at the Project (collectively, the "Services"):

- a) Coordinate with Referral Agency's Network of Special Needs providers in the primary market area served by the Project to ensure an adequate "network" that can provide Special Needs Households.
- b) Receive and process referrals from the Referral Agency's Network of Special Needs supportive service providers regarding Special Needs Households that are interested in and meet the requirements to apply to lease available reserved ELI units at the Project;
- c) Maintain a list of eligible Special Needs Households interested in applying for reserved ELI units as they become available;
- d) Designate a point of contact to receive notices from the Owner when there is a reserved unit available, work with the Project during the leasing and occupancy period for all Special Needs Household residents;
- e) Upon notification that a reserved unit is available, select the Special Needs Household at the top of the list waiting for that unit type and contact their service provider, if different than the Referral Agency, that a reserved unit is available;
- f) Coordinate the first contact between the selected special needs household, the household's service provider and the Project within a timely manner;
- g) Assist in addressing appropriate application or tenancy issues or concerns by the Owner, the supportive services provider (if different than the Referral Agency) and/or household if the concerns or issues are not able to be adequately resolved or handled by the primary parties;

- h) Provide or ensure that the Owner receives the Special Needs Household's required documentation pursuant to applicable compliance requirements established by FHFC;
- i) Work with the Owner, at least sixty (60) days prior to the first unit being available for rent, to finalize specific guidelines and procedures to implement the available unit notification and household referral policies and processes.

5. Owner's Responsibilities. The Owner (or the Management under a management agreement with the Owner) shall be responsible for the following:

- a) Notify the Referral Agency on a timely basis of reserved units as they become available;
- b) Work with Referral Agency to coordinate the first contact with the special needs household and that household's supportive services provider to initiate the application process;
- c) Collaborate with the referred Special Needs Household's designated supportive services provider, as appropriate and applicable, to address the household's needs for assistance at application and during tenancy;
- d) Notify the designated supportive services provider (if different than the Referral Agency), in a timely manner, of issues or concerns that may adversely affect the tenancy of the household;
- e) Designate a point person on-site at the Project to send notice of unit availability to the designated point person from the Referral Agency and to work with the Referral Agency during the leasing and occupancy period for all Special Needs Household residents.
- f) Contact Referral Agency if there are any issues or concerns that have not been satisfactorily resolved with the household and/or designated supportive services provider (if different than the Referral Agency)
- g) Work with the Referral Agency, at least sixty (60) days prior to the first unit being available for rent, to finalize specific guidelines and procedures to implement the available unit notification and household referral policies and processes;
- h) Inform the Referral Agency and, as applicable, the supportive services provider network about the property and unit characteristics and features, rents and related costs, household income limits or restrictions, resident rights and responsibilities, the resident application process, as well as the information and documents the household will need when applying for the reserved unit.

6. Availability of ELI Units. Referral Agency agrees that Owner shall only be required to leave eligible ELI units "open" for Referral Agency's referred Special Need Households for a fourteen (14) day period after notification of the availability of such units before making such units available to households not referred by the Referral Agency, except during the initial lease-up of the development, whereby such units shall be made available for Special Need Household referrals provided by the Referral Agency for a period of thirty (30) days. If the Referral Agency cannot provide a prospective resident which can be approved for residency within the respective time frame, then Owner may lease the units to any qualified ELI resident.

7. Term of Services.

(a) This MOU shall continue on an annual basis from the date of execution until either party provides notice of non-renewal to the other within thirty (30) days prior to expiration. Notwithstanding the foregoing, either party may terminate this MOU upon thirty (30) days prior written notice to the other party.

(b) If Referral Agency fails to adequately provide the services outlined in this MOU, Owner may terminate this MOU by providing written notice to Referral Agency as set forth above, and before such termination becomes effective, to immediately seek services from such other Special Needs Household referral agency providers deemed acceptable to FHFC. If Referral Agency elects to terminate the agreement for any reason, Owner may immediately seek services from such other Special Needs Household referral agency providers deemed acceptable to FHFC.

8. Representations and Warranties. Referral Agency represents and warrants that it is capable and qualified of performing under the terms and conditions of this MOU, and shall maintain the appropriate designations and certifications to perform its functions under this MOU in the jurisdiction where the Project is located.

9. Notices. All notices required or permitted under this MOU shall be in writing and addressed to the parties set forth in this section. Notices shall be deemed given and received when delivered to the party, if deliver by hand delivery, or when deposited with any regionally or nationally established overnight courier service, deposit, deposited in the U.S. Post Office, registered or certified mail, postage prepaid, return receipt requested, if mailed. Notices shall be addressed as follows:

If to Owner:    123 Apartments  
    44 West 4<sup>th</sup> Street  
    Anytown, FL 33555  
    Attention: Mae Jones  
    (555) 555-4444

If to Referral Agency:                                    ABC Referral Agency  
    12 East 9<sup>th</sup> Avenue  
    Anytown, FL 33555  
    Attention: Ed Smith  
    (555) 555-5555

11. Governing Law. All agreements set forth herein between Owner and Referral Agency shall be construed in accord with and governed by the laws of the State of Florida and the United States of America and the County and/or City in which the Project is located.



THIS MEMORANDUM OF UNDERSTANDING FOR SPECIAL NEEDS HOUSING SERVICES is agreed to upon the date first written above between:

**OWNER:**

By: \_\_\_\_\_

Name: \_\_\_\_\_

Title: \_\_\_\_\_

**REFERRAL AGENCY:**

By: \_\_\_\_\_

Name: \_\_\_\_\_

Title: \_\_\_\_\_