

# NCSHA 2016 Annual Awards Entry Form

(Complete one form for each entry)

**Deadline: Wednesday, June 15, 2016**

Visit [ncsha.org/awards](http://ncsha.org/awards) to view the Annual Awards Call for Entries.

**Instructions:** Type entry information into the form and save it as a PDF. Do not write on or scan the form. If you have any questions contact [awards@ncsha.org](mailto:awards@ncsha.org) or 202-624-7710.

Fill out the entry name *exactly* as you want it listed in the program.

**Entry Name:**

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**HFA:**

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**Submission Contact:** (Must be HFA Staff Member)

**Email:**

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Please provide a 15-word (maximum) description of your nomination to appear on the NCSHA website.

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

**HFA:**

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**Entry Name:**

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**Select the appropriate subcategory of your entry and indicate if you are providing visual aids.**

Communications	Homeownership	Legislative Advocacy	Management Innovation
Annual Report	Empowering New Buyers	Federal Advocacy	Financial
Creative Media	Encouraging New Production	State Advocacy	Human Resources
Promotional Materials and Newsletters	Home Improvement and Rehabilitation		Operations
			Technology
Rental Housing	Special Needs Housing	Special Achievement	Are you providing visual aids?
Encouraging New Production	Combating Homelessness	Special Achievement	Yes
Multifamily Management	Housing for Persons with Special Needs		No
Preservation and Rehabilitation			

## Overview

In 2008, the Indiana Housing and Community Development Authority (“IHCD”) and the Corporation for Supportive Housing (“CSH”) launched the Indiana Permanent Supportive Housing Initiative (“IPSHI”) as a public/private partnership designed to reduce chronic and long-term homelessness. IPSHI was designed to strategically allocate resources and increase partner capacity to develop permanent supportive housing based on the housing first model.

Since the launch of IPSHI, Indiana’s signature mechanism for developing supportive housing has been the Indiana Supportive Housing Institute (“Institute”). Through the Institute, teams consisting of a development partner, service provider, and property management receive over 80 hours of training, including individualized technical assistance from senior IHCD and CSH staff on topics ranging from financing and building design to service delivery and property management best practices. Teams successfully completing the Institute gain access to specifically reserved IHCD capital and operating funding sources, including low-income housing tax credits through the Qualified Allocation Plan and project-based rental assistance through the Housing Choice Voucher Administrative Plan.

To date, 37 teams have completed the Institute, resulting in the creation of 33 developments containing 936 units of supportive housing. The 8<sup>th</sup> Institute is currently underway with four new teams participating. Most importantly, since the launch of IPSHI/the Institute in 2008, Indiana has experienced a 38% reduction in chronic homelessness.

Although the Institute continues to be an excellent model for project concept development and capacity building, in 2015 IHCD recognized that graduating teams were facing challenges post-Institute, especially during the critical phases of construction, initial lease-up, and stabilization. These challenges arise for a number of reasons, a common one being that development team members (especially property management and service providers) may have changed from the time the team went through the Institute and the personnel in place now may have never received training on supportive housing techniques. In an effort to better provide ongoing (i.e. post-Institute) training and technical assistance, IHCD launched a new Supportive Housing Pipeline Management process to assist teams throughout the development stage from the time of initial project concept through the 2<sup>nd</sup> year of occupancy.

## The Pipeline Management Process: Technical Assistance Group

The first element of the Pipeline Management process was the creation of a Technical Assistance Group, internally referred to as the “TAG Team,” consisting of two key IHCD staff members and one staff member from the Indiana CSH office. All supportive housing developments that are somewhere between the stages of initial concept and stabilization are considered our pipeline, i.e. the universe of developments that receive technical assistance. Each development in the pipeline is assigned one of the TAG Team members as its primary point of contact, and that TAG Team member is responsible for tracking the progress of the development, identifying technical assistance needs, bringing together appropriate partners to solve issues and strengthen the project concept and operational plan, etc.

As a development progresses, its assigned TAG Team representative assesses it using various checklists tools. Developments are considered to be in one of four stages, and different assessments are used in each stage, as described below:

- Pre-Institute: These developments are in the initial concept phase and have not yet attended a Supportive Housing Institute. During this phase, the TAG Team member assesses the concept to see if it fits the goals of the Institute and to determine the readiness of the team to move forward.

- Institute/Pre-Funding: These development teams are either currently working through the Institute or have recently completed the Institute but not yet applied for funding. During this phase, the TAG Team member assesses the development team's readiness to apply for funding, ensuring that the team has identified a site and potential appropriate sources for capital, operating, and service funding.
- Funded: These developments have obtained funding and are either in the closing or construction process. During this phase, the TAG Team member tracks critical deadlines to ensure the development is completed in a timely manner. In addition, during this phase the TAG Team member makes sure that the property management, service, and tenant selection plans are finalized and compliant with program requirements so that leasing can begin as soon as the development has placed-in-service.
- Operational: These developments have placed-in-service and are somewhere between initial lease-up and the end of the second year of occupancy. During this phase, the TAG Team member focuses on occupancy, eviction prevention strategies, and the provision of voluntary services.

After completing the second year of occupancy, a development is removed from the Pipeline Tracking Tool and considered to be a stable development. While it is longer subject to ongoing oversight or assessment from a TAG Team member, the development team may certainly continue to request additional assistance and the TAG Team will provide that upon request.

The TAG Team meets briefly on a weekly basis to share concerns, provide important updates, and to work on general supportive housing initiatives for the agency.

In its first year of existence, the TAG Team worked with teams on a variety of issues and provided technical assistance including drafting tenant selection plan language, assessing eviction rates and considering eviction prevention strategies, brainstorming service delivery options, etc. Prior to implementation of the TAG Team and the Pipeline Management process, these post-Institute teams would not have received outreach or formal technical assistance. Problems would have gone unidentified until a larger issue arose, likely coming to our attention through constituent complaints or monitoring findings. By being proactive in assessing technical assistance needs, the TAG Team sees itself as a preventative measure to ensure that supportive housing operational plans are being designed correctly upfront to avoid the need for course correction later.

### **The Pipeline Management Process: Pipeline Committee**

The second element of the Pipeline Management process was the creation of a Pipeline Committee consisting of a cross-departmental and cross-organizational team of stakeholders with a common interest in ensuring the success of supportive housing developments in Indiana. Upon creation, the Pipeline Committee was charged with the following tasks:

- To ensure that there is good communication and collaboration between the supportive housing team and the local community to maximize the impact of the development;
- To monitor progress of supportive housing teams/developments from concept through the first two years of operation;
- To coordinate funding resources and project funding needs; and
- To ensure that supportive housing developed in Indiana is targeted to the most vulnerable populations, affordable, and based on a housing first model with the key principles of harm reduction, eviction prevention, and voluntary services.

Within IHCD, the Pipeline Committee consists of members from the Real Estate Development team (capital resources), Community Services team (operating resources), and Research & Innovation. In addition, the Committee includes individuals from CSH, the Federal Home Loan Bank of Indianapolis, and the Indiana

Department of Mental Health & Addiction. The full committee meets every other month and discusses every development within the current pipeline. During the meeting, the lead TAG Team member for each development provides a status update to the full Committee, focusing on recent achievements and/or challenges. Each Committee member has the chance to share additional information they may have about the development, as well as to share questions or concerns. Besides achieving the desired outcome of better management of our supportive housing pipeline, the Committee has also contributed to an increased collaborative spirit between all organizations involved.

### **Why should this be considered?**

The Indiana Supportive Housing Pipeline Management process is worthy of consideration by NCSHA for an award in the category of “Special Needs Housing: Combating Homelessness” for the following reasons:

- The process is an innovative way of providing ongoing technical assistance to providers of supportive housing.
- The process is replicable and cost-effective. The only costs are staff time and the process could be implemented by any HFA willing to invest the time to set up a pipeline management process and establish the necessary working relationships.
- The process effectively employs partnerships. Through the Pipeline Committee, as an example, IHCD is bringing in multiple interested stakeholder agencies to share information on the status of supportive housing developments in the state and to coordinate resources.
- The process helps IHCD achieve one of its agency strategic priorities of serving the housing needs of the most vulnerable populations. The technical assistance provided through the TAG Team and the coordination achieved through the Pipeline Committee ensures that supportive housing developed in Indiana will be of the highest quality for the vulnerable residents that will be served.

## Appendix A

Pipeline Tracking Tool – spreadsheet tool used to track the entire pipeline.

### Page 1

13	SAMPLE PROJECT	Units	FMR	Term	Annual Rental Assistance	Operations Budget	% Covered by RA	CoC Units	CoC SRA	Sec 8 Units	Sec 8 PBV	Other Units
STATUS		Total Units	0					Total Units	0	0	0	0
Institute		1 BR	0 \$ 846.00	12	\$ -				\$ -	\$ -	\$ -	\$ -
		2 BR	0 \$ 805.00	12	\$ -				\$ -	\$ -	\$ -	\$ -
TAG		3BR	0 \$ 1,008.00	12	\$ -				\$ -	\$ -	\$ -	\$ -
Mkt		4 BR	0 \$ 1,075.00	12	\$ -				\$ -	\$ -	\$ -	\$ -
				2 Annual RA	\$ -				\$ -	\$ -	\$ -	\$ -
14	SAMPLE PROJECT	Units	FMR	Term	Annual Rental Assistance	Operations Budget	% Covered by RA	CoC Units	CoC SRA	Sec 8 Units	Sec 8 PBV	Other Units
STATUS		Total Units	0					Total Units	0	0	0	0
Operational		1 BR	0 \$ -	12	\$ -				\$ -	\$ -	\$ -	\$ -
		2 BR	0 \$ -	12	\$ -				\$ -	\$ -	\$ -	\$ -
TAG		3BR	0 \$ -	12	\$ -				\$ -	\$ -	\$ -	\$ -
Lori		4 BR	0 \$ -	12	\$ -				\$ -	\$ -	\$ -	\$ -
				2 Annual RA	\$ -				\$ -	\$ -	\$ -	\$ -
15	SAMPLE PROJECT	Units	FMR	Term	Annual Rental Assistance	Operations Budget	% Covered by RA	CoC Units	CoC SRA	Sec 8 Units	Sec 8 PBV	Other Units
STATUS		Total Units	0					Total Units	0	0	0	0
Operational		1 BR	0 \$ -	12	\$ -				\$ -	\$ -	\$ -	\$ -
		2 BR	0 \$ -	12	\$ -				\$ -	\$ -	\$ -	\$ -
TAG		3BR	0 \$ -	12	\$ -				\$ -	\$ -	\$ -	\$ -
Rodney		4 BR	0 \$ -	12	\$ -				\$ -	\$ -	\$ -	\$ -
				2 Annual RA	\$ -				\$ -	\$ -	\$ -	\$ -

### Page 2

LHIC (credits)	LHIC (equity)	HOME	AHP	Other Capital 1	Other Capital 2	Debt	CSH PIL	Construction Loan	Bridge Loan	Perm Loan	Operating Reserves	Capital Reserves
				(insert source)	(insert source)			(insert lender)	(insert lender)	(insert lender)	(insert Source)	(insert Source)
\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	Original balance	\$ -	\$ -	\$ -	\$ -	Original Reserve	\$ -
Status	Provider	Status	Status	Status	Status	Outstanding	\$ -	\$ -	\$ -	\$ -	Balance	\$ -
											Per Unit Reserve	\$ -
LHIC (credits)	LHIC (equity)	HOME	AHP	Other Capital 1	Other Capital 2	Debt	CSH PIL	Construction Loan	Bridge Loan	Perm Loan	Operating Reserves	Capital Reserves
				(insert source)	(insert source)			(insert lender)	(insert lender)	(insert lender)	(insert Source)	(insert Source)
\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	Original balance	\$ -	\$ -	\$ -	\$ -	Original Reserve	\$ -
Status	Provider	Status	Status	Status	Status	Outstanding	\$ -	\$ -	\$ -	\$ -	Balance	\$ -
											Per Unit Reserve	\$ -
LHIC (credits)	LHIC (equity)	HOME	AHP	Other Capital 1	Other Capital 2	Debt	CSH PIL	Construction Loan	Bridge Loan	Perm Loan	Operating Reserves	Capital Reserves
				(insert source)	(insert source)			(insert lender)	(insert lender)	(insert lender)	(insert Source)	(insert Source)
\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	Original balance	\$ -	\$ -	\$ -	\$ -	Original Reserve	\$ -
Status	Provider	Status	Status	Status	Status	Outstanding	\$ -	\$ -	\$ -	\$ -	Balance	\$ -
											Per Unit Reserve	\$ -

## Appendix B

### Institute Assessment Checklist #1 – Concept

#### Indiana Housing and Community Development Authority

##### Supportive Housing Pipeline Checklist #1: Concept

**\*This checklist is used to track progress of teams that are considering a supportive housing project but have not yet been admitted into the Institute. Information is based on the requirements of the Institute RFP.**

Lead Organization \_\_\_\_\_ Lead Contact \_\_\_\_\_  
Project Location \_\_\_\_\_ Contact Phone \_\_\_\_\_  
Project Name \_\_\_\_\_ Contact e-mail \_\_\_\_\_

##### TEAM INFORMATION

Is the team in place? Yes ☐ No ☐

Developer \_\_\_\_\_ Turn-key ☐ Owner ☐  
Service Provider \_\_\_\_\_  
Property Management \_\_\_\_\_  
Other Key Partners \_\_\_\_\_

Local partner involvement/support  
CoC Yes ☐ No ☐ PHA Yes ☐ No ☐ LUG Yes ☐ No ☐

##### PROJECT CONCEPT/DESIGN

Has a site been located? Yes ☐ No ☐ Does the team have site control? Yes ☐ No ☐

Activity type: New Construction ☐ Rehab ☐

Type of supportive housing: 100% ☐ Integrated ☐

Total # of Units	
# of PSH Units	
# of Buildings	
If multiple buildings, is this single site or scattered site?	

##### TARGET POPULATION

Chronic Homelessness ☐ FUSE ☐ Homeless Families ☐

If multiple, what is the primary target population: \_\_\_\_\_

#### TECHNICAL ASSISTANCE GROUP

##### To-do Items

Summarize issues related to team

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TAG Member assigned for follow-up: \_\_\_\_\_ Due Date: \_\_\_\_\_

Summarize issues related to project concept/design

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TAG Member assigned for follow-up: \_\_\_\_\_ Due Date: \_\_\_\_\_

Summarize issues related to target population

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TAG Member assigned for follow-up: \_\_\_\_\_ Due Date: \_\_\_\_\_

Other issues/concerns

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TAG Member assigned for follow-up: \_\_\_\_\_ Due Date: \_\_\_\_\_

## Appendix B

### Institute Assessment Checklist #2 – Institute / Pre-Funding

#### Page 1-2

#### Indiana Housing and Community Development Authority

#### Supportive Housing Pipeline Checklist #2: Institute / Pre-Funding

\*This checklist is used to track progress of teams that are in the Institute or have completed the Institute but have not yet been funded.

Lead Organization \_\_\_\_\_ Lead Contact \_\_\_\_\_  
Project Location \_\_\_\_\_ Contact Phone \_\_\_\_\_  
Project Name \_\_\_\_\_ Contact e-mail \_\_\_\_\_

#### TEAM INFORMATION

Is the team in place? Yes ☐ No ☐ Are all team members committed and attending? Yes ☐ No ☐

Developer \_\_\_\_\_ Turn-key ☐ Owner ☐  
Service Provider \_\_\_\_\_  
Property Management \_\_\_\_\_  
Other Key Partners \_\_\_\_\_

Local partner involvement/support  
CoC Yes ☐ No ☐ PHA Yes ☐ No ☐ LUG Yes ☐ No ☐

#### PROJECT CONCEPT/DESIGN

Has a site been located? Yes ☐ No ☐ Does the team have site control? Yes ☐ No ☐  
Has TAG team visited site? Yes ☐ No ☐

Address: \_\_\_\_\_

Census Tract: \_\_\_\_\_

Activity type: New Construction ☐ Rehab ☐

Type of supportive housing: 100% ☐ Integrated ☐

Total # of Units		# Studio / 0BR units	
# of PSH Units		# 1 BR units	
# of Buildings		# 2 BR units	
If multiple buildings, is this single site or scattered site?		# 3 BR units	

#### TARGET POPULATION

Chronic Homelessness ☐ FUSE ☐ Homeless Families ☐

If multiple, what is the primary target population: \_\_\_\_\_

Has the tenant selection plan been reviewed by IHCDA/CSH? Yes ☐ No ☐  
Does the tenant selection plan have issues? Yes ☐ No ☐

#### SUPPORTIVE SERVICES

Has the supportive service plan been reviewed by IHCDA/CSH? Yes ☐ No ☐  
Does the supportive service plan have issues? Yes ☐ No ☐

#### SERVICE FUNDING SOURCES

Source \_\_\_\_\_  
Is funding secured? Yes ☐ No ☐  
Direct ☐ Leveraged ☐

Source \_\_\_\_\_  
Is funding secured? Yes ☐ No ☐  
Direct ☐ Leveraged ☐

Source \_\_\_\_\_  
Is funding secured? Yes ☐ No ☐  
Direct ☐ Leveraged ☐

#### OPERATING FUNDING SOURCES

Source \_\_\_\_\_  
Is funding secured? Yes ☐ No ☐  
Direct ☐ Leveraged ☐

Source \_\_\_\_\_  
Is funding secured? Yes ☐ No ☐  
Direct ☐ Leveraged ☐

Source \_\_\_\_\_  
Is funding secured? Yes ☐ No ☐  
Direct ☐ Leveraged ☐

#### CAPITAL FUNDING SOURCES

Source \_\_\_\_\_  
Is funding secured? Yes ☐ No ☐  
Direct ☐ Leveraged ☐

Source \_\_\_\_\_  
Is funding secured? Yes ☐ No ☐  
Direct ☐ Leveraged ☐

Source \_\_\_\_\_  
Is funding secured? Yes ☐ No ☐  
Direct ☐ Leveraged ☐

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**GRADUATION CHECKLIST**

Has the team graduated from the Institute? Yes ☐ No ☐  
\*All items below must be answered "yes"

Attended all Institute sessions Yes ☐ No ☐  
MOU in place with CSH Yes ☐ No ☐  
Budget Yes ☐ No ☐  
Identified Funding Sources Yes ☐ No ☐  
Tenant Selection Plan Yes ☐ No ☐  
Supportive Service Plan Yes ☐ No ☐

**TECHNICAL ASSISTANCE GROUP**  
**To-do Items**

Summarize issues related to team  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

TAG Member assigned for follow-up: \_\_\_\_\_ Due Date: \_\_\_\_\_

Summarize issues related to project concept/design  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

TAG Member assigned for follow-up: \_\_\_\_\_ Due Date: \_\_\_\_\_

Summarize issues related to target population / tenant selection plan  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

TAG Member assigned for follow-up: \_\_\_\_\_ Due Date: \_\_\_\_\_

Summarize issues related to supportive services  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

TAG Member assigned for follow-up: \_\_\_\_\_ Due Date: \_\_\_\_\_



**Page 5**

Summarize issues related to service funding

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TAG Member assigned for follow-up: \_\_\_\_\_ Due Date: \_\_\_\_\_

Summarize issues related to operating funding

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TAG Member assigned for follow-up: \_\_\_\_\_ Due Date: \_\_\_\_\_

Summarize issues related to capital funding

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TAG Member assigned for follow-up: \_\_\_\_\_ Due Date: \_\_\_\_\_

What does team need to do to proceed?

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TAG Member assigned for follow-up: \_\_\_\_\_ Due Date: \_\_\_\_\_

## Appendix C

### Institute Assessment Checklist #3 – Funded

#### Page 1-2

#### Indiana Housing and Community Development Authority

##### Supportive Housing Pipeline Checklist #3: Funded

\*This checklist is used to track progress of developments that have been funded but are not yet operational.

Lead Organization \_\_\_\_\_ Lead Contact \_\_\_\_\_  
Project Location \_\_\_\_\_ Contact Phone \_\_\_\_\_  
Project Name \_\_\_\_\_ Contact e-mail \_\_\_\_\_

##### TEAM INFORMATION

Has any team member changed? Yes ☐ No ☐ Does any member need TA? Yes ☐ No ☐

Developer \_\_\_\_\_ Turn-key ☐ Owner ☐  
Service Provider \_\_\_\_\_  
Property Management \_\_\_\_\_  
Other Key Partners \_\_\_\_\_

##### PROJECT CONCEPT/DESIGN

Address: \_\_\_\_\_

Census Tract: \_\_\_\_\_

Activity type: New Construction ☐ Rehab ☐

Type of supportive housing: 100% ☐ Integrated ☐

Total # of Units	# Studio / 0BR units
# of PSH Units	# 1 BR units
# of Buildings	# 2 BR units
If multiple buildings, is this single site or scattered site?	# 3 BR units

##### TARGET POPULATION

Has the target population changed? Yes ☐ No ☐

\*If so, what is the new target population?

Chronic Homelessness ☐ FUSE ☐ Homeless Families ☐

If multiple, what is the primary target population:

Is the project part of the CoC coordinated access assessment? Yes ☐ No ☐

-If no, describe the issue in the technical assistance section.

##### SERVICE FUNDING SOURCES

Source \_\_\_\_\_

Is funding secured? Yes ☐ No ☐

Direct ☐ Leveraged ☐

Actions needed: \_\_\_\_\_

Regulatory stipulations: \_\_\_\_\_

Source \_\_\_\_\_

Is funding secured? Yes ☐ No ☐

Direct ☐ Leveraged ☐

Actions needed: \_\_\_\_\_

Regulatory stipulations: \_\_\_\_\_

Source \_\_\_\_\_

Is funding secured? Yes ☐ No ☐

Direct ☐ Leveraged ☐

Actions needed: \_\_\_\_\_

Regulatory stipulations: \_\_\_\_\_

##### OPERATING FUNDING SOURCES

Source \_\_\_\_\_

Is funding secured? Yes ☐ No ☐

Direct ☐ Leveraged ☐

Actions needed: \_\_\_\_\_

Regulatory stipulations: \_\_\_\_\_

Source \_\_\_\_\_

Is funding secured? Yes ☐ No ☐

Direct ☐ Leveraged ☐

Actions needed: \_\_\_\_\_

Regulatory stipulations: \_\_\_\_\_

Source \_\_\_\_\_

Is funding secured? Yes ☐ No ☐

Direct ☐ Leveraged ☐

Actions needed: \_\_\_\_\_

Regulatory stipulations: \_\_\_\_\_

##### CAPITAL FUNDING SOURCES

Has the partnership agreement been executed? Yes ☐ No ☐

-If not, are there are outstanding issues? Yes ☐ No ☐

-If not, what is anticipated execution date? \_\_\_\_\_

Has the project reached closing? Yes ☐ No ☐

-If not, are there are outstanding issues? Yes ☐ No ☐

-If not, what is anticipated closing date? \_\_\_\_\_

Has construction begun: Yes ☐ No ☐

-If not, are there are outstanding issues? Yes ☐ No ☐

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-If not, what is anticipated begin date? \_\_\_\_\_  
-If yes, what is anticipated end date? \_\_\_\_\_  
-If yes, are there construction issues? Yes ☐ No ☐  
Carryover Agreement executed? Yes ☐ No ☐  
Date 10% test must be met \_\_\_\_\_  
-Met? Yes ☐ No ☐  
Date project must be placed-in-service \_\_\_\_\_  
-Which source dictates? \_\_\_\_\_  
-Met? Yes ☐ No ☐  
-Date Met \_\_\_\_\_

**MEDIA COVERAGE / OUTREACH**

Are there any scheduled news releases? Yes ☐ No ☐  
If so, have IHcDA and CSH media team reviewed? Yes ☐ No ☐  
Are there any scheduled events (e.g. groundbreaking, open house, etc.)? Yes ☐ No ☐  
Date of event \_\_\_\_\_  
If so, who is representing IHcDA/CSH? \_\_\_\_\_  
Who else should be in attendance? \_\_\_\_\_  
-Have they been invited? Yes ☐ No ☐

**TECHNICAL ASSISTANCE GROUP**  
**To-do Items**

Summarize issues related to team

TAG Member assigned for follow-up: \_\_\_\_\_ Due Date: \_\_\_\_\_

Summarize issues related to project concept/design

TAG Member assigned for follow-up: \_\_\_\_\_ Due Date: \_\_\_\_\_

Summarize issues related to target population

TAG Member assigned for follow-up: \_\_\_\_\_ Due Date: \_\_\_\_\_

Summarize issues related to service funding

TAG Member assigned for follow-up: \_\_\_\_\_ Due Date: \_\_\_\_\_

**Page 5**

Summarize issues related to operating funding

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TAG Member assigned for follow-up: \_\_\_\_\_ Due Date: \_\_\_\_\_

Summarize issues related to capital funding

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TAG Member assigned for follow-up: \_\_\_\_\_ Due Date: \_\_\_\_\_

Summarize issues related to media/outreach

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TAG Member assigned for follow-up: \_\_\_\_\_ Due Date: \_\_\_\_\_

What does team need to do to proceed?

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TAG Member assigned for follow-up: \_\_\_\_\_ Due Date: \_\_\_\_\_

## Appendix D

### Institute Assessment Checklist #4 – Operational

#### Pages 1-2

#### Indiana Housing and Community Development Authority

##### Supportive Housing Pipeline Checklist #4: Operational

\*This checklist is used to track progress of developments from placed-in-service through end of Year 2

Lead Organization \_\_\_\_\_ Lead Contact \_\_\_\_\_  
Project Location \_\_\_\_\_ Contact Phone \_\_\_\_\_  
Project Name \_\_\_\_\_ Contact e-mail \_\_\_\_\_

##### TEAM INFORMATION

Has any team member changed? Yes ☐ No ☐ Does any member need TA? Yes ☐ No ☐

Developer \_\_\_\_\_ Turn-key ☐ Owner ☐  
Service Provider \_\_\_\_\_  
Property Management \_\_\_\_\_  
Other Key Partners \_\_\_\_\_

##### PROJECT CONCEPT/DESIGN

Address: \_\_\_\_\_

Census Tract: \_\_\_\_\_

Activity type: New Construction ☐ Rehab ☐

Type of supportive housing: 100% ☐ Integrated ☐

Total # of Units		# Studio / 0BR units	
# of PSH Units		# 1 BR units	
# of Buildings		# 2 BR units	
If multiple buildings, is this single site or scattered site?		# 3 BR units	

##### TAX CREDIT STATUS

Have 8609s been issued? Yes ☐ No ☐  
If no, has final application been submitted to IHCDA? Yes ☐ No ☐  
If yes, what is the first year of the credit period? \_\_\_\_\_

##### TARGET POPULATION / TENANT SELECTION

Chronic Homelessness ☐ FUSE ☐ Homeless Families ☐

If multiple, what is the primary target population: \_\_\_\_\_

-How many units for each population? \_\_\_\_\_

Are they serving the target population? Yes ☐ No ☐

Is the tenant selection plan being utilized? Yes ☐ No ☐

Have any changes been made? Yes ☐ No ☐

-If so, has the new plan been reviewed? Yes ☐ No ☐

Is the project part of the CoC coordinated access assessment? Yes ☐ No ☐

-If no, describe the issue in the technical assistance section.

Is the project utilizing HMIS? Yes ☐ No ☐

-If no, describe the issue in the technical assistance section.

##### SUPPORTIVE SERVICES

Are the services in place? Yes ☐ No ☐

Are there issues with services? Yes ☐ No ☐

Has there been staff turnover? Yes ☐ No ☐

##### PROPERTY MANAGEMENT

Is an enhanced property management plan in place? Yes ☐ No ☐

Is an eviction prevention plan in place? Yes ☐ No ☐

Do property mgmt and service staff meet regularly? Yes ☐ No ☐

Are roles properly delineated? Yes ☐ No ☐

Has the lease been reviewed by IHCDA/CSH? Yes ☐ No ☐

Does the lease meet funding requirements? Yes ☐ No ☐

Are services voluntary? Yes ☐ No ☐

Are all units leased? Yes ☐ No ☐ as of \_\_\_\_\_

If not, is there a plan (referrals, marketing, etc.)? Yes ☐ No ☐ as of \_\_\_\_\_

What is turnover rate? \_\_\_\_\_ as of \_\_\_\_\_

Has there been staff turnover? Yes ☐ No ☐

Have there been any compliance concerns/complaints? Yes ☐ No ☐

\*If so, specify in the TA section.

##### TENANT INVOLVEMENT

**Pages 3-4**

TECHNICAL ASSISTANCE GROUP To-do Items
Summarize issues related to team
TAG Member assigned for follow-up: _____ Due Date: _____
Summarize issues related to project concept/design
TAG Member assigned for follow-up: _____ Due Date: _____
Summarize issues related to target population / tenant selection plan
TAG Member assigned for follow-up: _____ Due Date: _____
Summarize issues related to supportive services
TAG Member assigned for follow-up: _____ Due Date: _____

Summarize issues related to property management

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

TAG Member assigned for follow-up: \_\_\_\_\_ Due Date: \_\_\_\_\_

Summarize issues related to tenant involvement

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

TAG Member assigned for follow-up: \_\_\_\_\_ Due Date: \_\_\_\_\_

What does team need to do to proceed?

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

TAG Member assigned for follow-up: \_\_\_\_\_ Due Date: \_\_\_\_\_