

PHFA Affirmative Fair Housing Marketing Plan Checklist

	Property Name:	PHFA No:	
Item #	Form HUD 935.2A		Complete
1a	Project name and full address. <b><u>The most frequent omission is the county.</u></b>		
1b	Project's Section 8 contract number. <b><u>Do not use the PHFA number unless it has Tax Credits.</u></b>		
1c	List the total number of units in the development.		
1d	Provide the census tract number. Provide a copy of the specific page(s) from the census report on which the plan was based. The areas considered to be the market area should be identified (highlighted). <b><u>The most frequent mistake is the incorrect census tract number.</u></b>		
1e	Submit a map designating the Housing Market Area and the Expanded Housing Market Area (town/city from which the owner/agent intends to draw applicants). A housing market area is the area from which an owner may reasonably expect to draw a substantial number of its residents. An expanded housing market area is a larger geographic area which could provide additional demographic diversity in terms of race, color, national origin, religion, sex, familial status, or disability.		
1f	Provide the management agent's name, address, telephone number, & email address. <b><u>The most frequent omissions are the telephone number and email address.</u></b>		
1g	Provide owner's name, address, telephone number, & email address. <b><u>The most frequent omissions are the telephone number and email address.</u></b>		
1h	Check the entity responsible for marketing (owner, agent, or other). Also provide position, name address, telephone and email of the person responsible for implementing marketing plan. <b><u>The most frequent omitted items are the telephone number and email address.</u></b>		
1i	Provide the name, address, telephone number, & email address of the person to whom approval and other correspondence should be sent regarding the AFHMP. <b><u>The most frequent omissions include the telephone number and email address.</u></b>		
2a	Existing Section 8/Tax Credit properties had an AFHMP completed when they opened. They should choose "Updated Plan". List the date of the first approved plan or the date of the oldest plan available. New properties should choose "Initial Plan". <b><u>The most frequent omission is this item is left blank.</u></b>		
2b	Select the occupancy type of the project and check <b><u>ALL</u></b> that apply.		
2c	List the date of <b><u>initial occupancy</u></b> . If this plan is for a new property, list the anticipated opening date.		
2d	List the advertising start date. <b>New construction and substantial rehabilitation projects:</b> Advertising must begin at least 90 days prior to initial occupancy. <b>Existing properties:</b> Check appropriate box to indicate whether the advertising will be used to fill existing vacancies, to place individuals on the project's waiting list, or to re-open a closed waiting list. Indicate how many people are on the waiting list when advertising begins.		
3a	Use American Fact Finder on the US Census website (data from the 2010 census must be used). Provide census data and maps. <b><u>Omitting supporting census data and maps will result in the plan being returned.</u></b> Enter the data into Worksheet 1 which is designed to help identify which groups of applicants might need additional outreach to apply for housing at the property. ○ Project %: List the percentage of individuals from each demographic category that reside at		

PHFA Affirmative Fair Housing Marketing Plan Checklist

	<p>the property.</p> <ul style="list-style-type: none"> <li>○ Project’s Applicant Data %: Use wait list information to provide % of individuals from each demographic category.</li> <li>○ Census Tract %: List % of individuals from each demographic category that reside in the property’s census tract.</li> <li>○ Housing Market Area: List the % of individuals from each demographic category that reside in the property’s housing market area.</li> <li>○ Expanded Housing Market Area: List % of individuals from each demographic category that reside in the property’s expanded housing market area. Please note that the expanded housing market area should be utilized if the smaller housing market area is not diverse enough to attract demographic groups underrepresented as tenants at the property and/ or on the waiting list.</li> <li>○ <b>If the current occupancy and Housing Market Area are not demographically diverse, applicants MUST utilize the Expanded Housing Market Area.</b></li> </ul> <p><b><u>The most frequent omissions are:</u></b></p> <ul style="list-style-type: none"> <li>○ <b><u>Incomplete data on Worksheet 1</u></b></li> <li>○ <b><u>Missing maps of the Market Area and Expanded Market Area</u></b></li> </ul>	
3b	<p>Review the data collected on Worksheet 1 and identify the demographic group(s) least likely to apply for the housing without special outreach. Check all boxes that apply. Is EACH group in the community appropriately represented at the property or on the waiting list? <b>Checked boxes should correspond directly with the census data.</b></p> <p><b><u>The most frequent omission is this step is not complete.</u></b></p>	
4a	<p>If the owner wants to request a residency preference, review the procedures in the HUD Handbook 4350.3 REV 1. <b>If there is an existing residency preference, provide documentation and complete Worksheet 2.</b></p> <p><b><u>Most properties answer this question NO.</u></b></p>	
4b	<p>Use Worksheet 3 to describe the use of community contacts to help market the project to those least likely to apply.</p> <p><b><u>*Must include PHFA Supportive Services Officer, Danielle Rudy</u></b>  <b><u>211 N. Front St. Harrisburg, PA 17105</u></b> <a href="mailto:drudy@phfa.org">drudy@phfa.org</a></p> <p>List targeted groups down the left column and list a specific community contact for each group identified in Section 3b. At least one community contact must be listed for each underrepresented group. Each blank in this section must be completed (address, phone numbers, etc.). The frequency of contacts must be stated, at a minimum, as “at least once annually” or “(date) and annually thereafter.” Sample community contact letters must be attached.</p> <p>Provide:</p> <ul style="list-style-type: none"> <li>○ The name of the contact person</li> <li>○ List Agency</li> <li>○ Address of the contact person</li> <li>○ Telephone number</li> <li>○ Previous experience working with targeted group</li> <li>○ Approximate date was/will be initiated</li> <li>○ State the specific role the contact will play in assisting with the marketing</li> <li>○ List how often the agency will be contacted (<u>annually at a minimum</u>)</li> </ul> <p><b><u>The most frequent omissions are the anticipated date the contact will begin, the role the contact has agreed to play, and the contact’s experience working with the targeted group.</u></b></p>	
4c	<p>Use Worksheet 4 to list the specific methods of advertising that will be used to reach each group identified in Section 3b.</p> <p><b><u>*Must include PAHousingsearch.com in electronic media</u></b></p> <ul style="list-style-type: none"> <li>○ Method of advertising: List the types and/or names of newspapers, radio stations, television stations, radio stations, electronic media, bulletin boards, brochures, and flyers that will be used in marketing the property. Minority newspapers should be considered as part of the</li> </ul>	

PHFA Affirmative Fair Housing Marketing Plan Checklist

	<p>advertising plan.</p> <ul style="list-style-type: none"> <li>○ Targeted Population: For each method of advertising, list the targeted audience and state any languages other than English that the information will be provided. <i>Do NOT use generic terms like "All/Mixed". Be specific when listing the target population for each applicable medium.</i></li> <li>○ Indicate that the marketing will be done annually.</li> <li>○ Attach copies of all marketing materials. Copies must include the name and the date of publication (if applicable).</li> <li>○ All documents are required to have the equal housing opportunity statement, logo or slogan.</li> <li>○ Indicate future marketing activities that include (as a minimum) "newspapers, a site sign, and community contacts."</li> </ul>	
5a	<p>Check off each location where the Fair Housing Poster will be displayed. Make sure to display the most current version of the Poster (HUD Form 928.1, currently 2011).  <u><b>Note: PHFA properties must also display the most current version of the HRC Fair Housing Practices poster</b></u></p>	
5b	<p>Check off all locations where the Affirmative Fair Housing Marketing Plan (AFHMP) will be available for public inspection.</p>	
5c	<p>A photo or rendering of the property sign must be provided. Provide the dimensions of the project sign and describe in terms of feet and/or inches. The logo and the words "Equal Housing Opportunity" must be distinguishable. Use of the accessibility logo may be used.  <u><b>Most frequent omission is that this part is not completed.</b></u></p>	
6	<p>Explain the process you will use to evaluate this AFHMP. How will you determine whether your marketing strategies have been a success in attracting those least likely to apply? How often will you make this determination? Describe how future decisions about marketing will be based on the evaluation process.</p>	
7	<p>List the names of the staff and their positions that will be responsible for affirmative marketing.</p>	
7b	<ul style="list-style-type: none"> <li>○ Indicate if staff has been trained on this AFHMP.</li> <li>○ Indicate if staff has been instructed <u>in writing and orally</u> on non-discrimination and fair housing policies, as required. If the answer is Yes, list the name of the individual who provided instruction.</li> <li>○ Indicate if staff is periodically assessed on their skills on the use of the AFHMP and the Fair Housing Act. If the answer is Yes, indicate how often and how this is assessed.</li> </ul>	
7c	<p>Indicate whether staff has been trained on tenant selection in accordance with the project's occupancy policy, including residency preferences (if any). Identify those staff positions that are/will be responsible for tenant selection.</p>	
7d	<p>Describe all AFHMP/Fair Housing training. Be specific with regard to staff training topics: Reasonable Accommodation/Modification, Fair Housing Act, Americans with Disabilities Act, 504 Regulations and so on. Indicate the dates of past training and anticipated training dates. <b>Include copies of any training materials.</b></p>	
8	<p>Describe any additional considerations that are planned to outreach to groups not previously mentioned in the plan.</p>	
9	<p>Sign and date the plan. The signature indicates the owner or person submitting this plan agrees to review the plan every 5 years (each year for Rural Housing properties). The signature also certifies that all the information state in the plan is true and correct.  <u><b>The most frequent omission is that the plan is submitted with out a signature.</b></u></p>	
10	<p>Submit the AFHMP, all attachments, and the <u><b>PHFA AFHMP Addendum to PHFA.</b></u></p>	
11	<p><b>For USDA Properties per HB-1-3565; Exhibit 4-1:</b></p> <p>Provide information on the rental rates. Indicate rents from lowest to highest. If there is rental assistance, the lowest rent should be shown as zero.</p>	

PHFA Affirmative Fair Housing Marketing Plan Checklist