

### **Tab 11 Supportive Services Plan and Questionnaire Instructions**

All developments must confirm that a minimum level of supportive services appropriate to the proposed resident population is available at the property. Developments that provide delivery of specific services and funding for a fifteen (15) year period may qualify for ranking consideration the Selection Criteria.

Applicants requesting consideration for points for service-enriched housing as defined in the Selection Criteria must complete and submit a Service Provider Questionnaire. The questionnaire should be completed by the organization that will be the primary service provider/coordinator.

Applicants requesting consideration for providing service-enriched housing must demonstrate through a Supportive Services Plan, following the established outline that they are providing a level and scope of services consistent with the anticipated needs of the target resident population (general occupancy, over 55, over 62, or populations with special needs). The applicant must provide evidence that appropriate services will be provided for the entire resident population for the duration of the compliance period. Evidence consists of a supportive services plan that: 1) is specific to the development and provides a scope of services that assures access to comprehensive services relevant to this population without major barriers to participation; 2) includes sufficient funds to implement the described plan of services; and 3) utilizes a service provider who is experienced in delivering services in a service enriched housing or supportive housing setting for the target population, and has the capacity to deliver the described services with sufficiently equipped staff.

See the Supportive Services Plan Outline and Questionnaire for scoring Requirements. Funds committed must include a line item for supplies to support the services program.

If a supportive services reserve is included in the Development Budget, a signed Letter of intent must be provided. For Agency funded developments, the escrow must be held by PHFA and be trended at 3% for payroll and supplies. Documentation of the trended escrow must be provided and can be calculated by Excel. **For Preservation Projects, the Supportive Services Escrow must be funded at closing.**

To be considered under the Homeownership option (Tab 13), a supportive services plan, which must include a financial literacy component, must be included in the application, and the plan must be approved by Agency staff.

Items to be included in this tab (if applicable):

- Supportive Services Plan specific to target population:  
General Occupancy, Senior 55+, Senior 62+, Senior 62+ with Health Services, Special Needs etc.
- Service Provider Questionnaire
- Supportive Services Escrow Letter of Intent signed by the owner. For Agency funded projects, the escrow must be held by PHFA and be trended at 3% for payroll and supplies. Documentation of the trended escrow must be provided and can be calculated by Excel.