

## **Proposed Elderly Transformative Preservation Approach in Upcoming Requests for Applications (RFAs)**

### **WORKSHOP INFORMATION**

- June 10, 2014, 9:30 a.m., Eastern Time
- Accessible by telephone or interested parties may attend in person at 227 N. Bronough Street, Seltzer Room, Suite 6000, Tallahassee, Florida.
- The call-in information is posted to the website at:  
<http://www.floridahousing.org/Developers/MultiFamilyPrograms/Competitive/2014-111/>
- Purpose: To discuss how Florida Housing proposes to incorporate financing for Elderly Transformative Preservation into upcoming RFAs, and the key components of how Florida Housing expects to evaluate Applications for Elderly Transformative Preservation of existing affordable rental developments currently serving elders.

### **OVERVIEW**

#### **Introduction**

Most elders want to remain in their homes as long as possible, and most fear they will end up in institutional settings as a result of disability and limitations as they age. In 2013, the average annual cost for a semi-private room in a nursing home in Florida was more than \$81,000 and nearly \$38,800 for assisted living. Cost studies nationally show that home health services are much less expensive, with costs increasing more slowly overall than institutional long term care. These costs impact not only families, but Medicare and Medicaid, which together pay for the majority of long term care.

The Permanent Supportive Housing model currently financed through the Corporation's programs provides affordable housing combined with supportive services provided by partners working with a property owner. A promising strategy proposed through Elderly Transformative Preservation will apply aspects of this model to elder properties, but modify it to focus on the aging in place needs of elders by bringing health and long-term care services and supports into these properties. The idea is to set up the housing to serve as a platform for meeting the health and long term needs of elders, but below licensing care levels required of assisted living facilities.

To provide the strongest supports for elders, this model will require property owners to engage in contractual partnerships with local health and long-term care systems, possibly including hospitals and home health care providers, to provide on-site services for residents. To do this, properties must have or create adequate space for services to be delivered, including offices for a service coordinator, nurse and other health or social services providers; and space for group health education and exercise programming. Just as with other Permanent Supportive Housing financed by the Corporation, this type of service-enriched housing will keep property owners focused on the business of housing and property management, but working in concert with knowledgeable health care and supportive service providers.

The first RFA proposed to be issued that includes the Elderly Transformative Preservation set-aside will offer State Apartment Incentive Loan (SAIL) financing for the new construction, rehabilitation or redevelopment of affordable multifamily housing targeted for families and the Elderly. This RFA will include a set-aside from SAIL program income to fund one (1) aging property that must already be in the Corporation's portfolio that is currently targeted to serve elderly residents, and which meets specific eligibility criteria to be announced at a later date. The SAIL financing offered in this RFA must be paired with Tax-Exempt Bonds (obtained through the Corporation, a Public Housing Authority established under Chapter 421, F.S., a County Housing Finance Authority established pursuant to Section 159.604, F.S., or a Local Government) and Non-Competitive (4 percent) low income housing tax credits. Additional SAIL funding will be provided as a forgivable loan to further support the development of units set aside for Extremely Low Income (ELI) residents.

A development awarded Elderly Transformative Preservation financing must include the following: refinancing of the property; rehabilitation of all units and the common spaces to allow residents to age in place and to provide enough common space for the activities outlined above; and creation of partnerships with local health care supportive service providers as appropriate to provide on-site services to residents. Property owners shall be required to carry out a thoughtful relocation plan during rehabilitation to ensure that current residents are well supported as their units are rehabilitated. The Corporation is seeking applicants willing to meet the above criteria as well as incorporate the following features and services, which will be outlined in detail in the RFA, at their properties:

- Accessible, adaptable construction features that aid residents with age related impairments and increasing mobility issues to get around their units and the entire property, as well as assist in performing activities of daily living;
- On-site 24/7 staff to assist with resident situations that arise;
- Resident services coordinator(s) to ensure that as residents' needs change, they receive assistance in accessing services and resources provided by community-based organizations for their current situation;
- On-site access to healthcare and other activities of daily living through partnerships with local hospital/healthcare systems;
- On-site access to other specified resident services, such as meals and homemaker/personal care services; and
- Access to community-based amenities and services (particularly health care), including private transportation required to be affiliated with the property.

### **Two Upcoming RFAs Proposed to Include Financing for Elderly Transformative Preservation**

- The upcoming SAIL RFA that will target the Family and Elderly demographics.
  - A set-aside to fund one Elderly Transformative Preservation property.
- As part of a future Competitive (9 percent) Housing Credit Preservation RFA.
  - A set-aside is being considered to fund an Elderly Transformative Preservation property.

### **Properties Eligible for the Elderly Transformative Preservation Set-Aside**

- SAIL RFA: Developments proposed to be eligible for Elderly Transformative Preservation financing proposed to be limited to aging properties in the Corporation's portfolio
  - Currently set aside for elderly residents;
  - At least 15 years old;
  - Do not contain or are not part of a scattered site development;
  - Have 95 or more total units.<sup>1</sup>
  
- 9% Housing Credit RFA: Elderly properties that meet the definition of prior Preservation RFAs, and:
  - Do not contain or are not part of a scattered site development;
  - Have 95 or more total units.

### **Description of the Elder Population to Be Served at an Elderly Transformative Preservation**

#### **Property**

The intent of this funding opportunity is to assist low income elderly households residing in elderly-specific rental housing to age in place. These households are a diverse population with various levels of independence and needs related to age, socioeconomic status, health and frailty status, informal supports and level of independence. The intended residents are households:

- 62 years or older (100% of the household heads must be this age);<sup>2</sup>
- Having incomes at or below 60% of area median income (AMI), with at least 15% of the households being extremely low income (100% of the households);
- That are independent, but regularly or at times need assistance with activities of daily living and/or maintaining their health and wellness to continue living in their home and community.

The level and type of assistance the intended residents want and need to age in place will also be diverse. The common factors that are vital for all elders to successfully age in place are:

- Convenient access to community resources for primary, acute and chronic healthcare and related services such as dental, podiatry care and wellness programs;
- Convenient access to community resources for shopping, banking, socialization, recreation and faith-based activities;
- Convenient access to supportive services, when needed, to assist with activities of daily living such as personal care, housekeeping, shopping, meal preparation and transportation;
- Assistance with becoming aware of, applying for, brokering and coordinating healthcare and supportive services and benefits for such;
- Construction features that facilitate greater independence, mobility, ease of use and safety.

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<sup>1</sup> The unit total requirement is because evidence shows that economies of scale are important to consider when providing health and wellness services at these properties. A property must have enough residents to make it worth a care provider's time to base services at the property.

<sup>2</sup> The Corporation expects properties awarded financing for transformative preservation will transition over to serving residents meeting this age requirement as current residents move out and units become available.

A significant number of intended residents live on fixed and limited incomes and are receiving or eligible for publicly funded acute and long-term healthcare and related services through Medicare and/or Medicaid. Many are also receiving or can be eligible for community-based supportive services to assist with activities of daily living funded through resources such as Medicaid, the Older Americans Act, state programs; as well as local community healthcare and social services organizations. Most of these services, with the exception of acute healthcare, are provided outside of a hospital facility. Many of the long-term care and supportive services are provided where the elder lives through community-based providers such as home health care agencies, councils on aging, and local for-profit and non-profit organizations. The range of services is varied and extensive including post-hospitalization care, wound care, medication management, physical therapy, health and wellness education, falls prevention and mobility training, congregate and home-delivered meals, needs assessment and planning, money management, laundry, and performing all types of household chores.

The State of Florida has recently implemented the Statewide Medicaid Managed Care Long-term Care Program, and most Floridians 65 or older who are receiving Medicaid have been moved under this Program. The State has contracted with managed care organizations that will administer the provision of Medicaid eligible services through local providers. A primary goal of the Program is to keep their elderly consumers healthy and living in the least restrictive environment – which is their own home. A fiscal goal is to save public resources by coordinating and effectively utilizing the provision of services to address each elder's needs.

The Elderly Transformative Preservation concept is a best-practice approach to promote aging in place through the provision of affordable and accessible housing that are linked with community based healthcare and supportive services.

For the Corporation to better understand the proposed Development, Applicants must include a description the subpopulation(s) of the individuals and/or families intended to reside in the proposed Development. This information will be considered by the Corporation when reviewing and scoring how the on-site services and access to community-based services will assist the intended residents. Applicants will be expected to provide a detailed description of the resident household characteristics, needs, and preferences of the intended residents and how the proposed Development will meet the needs and preferences of the intended residents.

## **KEY ITEMS TO BE SCORED FOR ELDERLY TRANSFORMATIVE PRESERVATION**

***(Points for Each Section to Be Determined Later)***

### **Developer Experience**

***(scored item)* General Affordable Housing Development Experience.** At least one Principal of the Developer entity, or if more than one Developer entity, at least one Principal of at least one of the Developer entities, must meet the Developer experience requirements outlined below. During the credit underwriting process, the Applicant will be required to demonstrate such experience.

A Principal of each experienced Developer entity must have, since January 1, 1991, completed at least three (3) affordable rental housing developments, at least one (1) of which was a Housing Credit development completed since January 1, 2001. At least one (1) of the three (3) completed developments must consist of a total number of units no less than 50 percent of the total number of

units in the proposed Development. For purposes of this provision, completed for each of the three (3) developments means (i) that the temporary or final certificate of occupancy has been issued for at least one (1) unit in one of the residential apartment buildings within the development, or (ii) that at least one (1) IRS Form 8609 has been issued for one of the residential apartment buildings within the development. As used in this section, a Housing Credit development, including a development that contains multiple buildings, is a single development regardless of the number of buildings within the development for which an IRS Form 8609 has been issued.

If the experience of a Principal for a Developer entity listed in this Application was acquired from a previous affordable housing Developer entity, the Principal must have also been a Principal of that previous Developer entity.

**Specialized Development Experience.** The scored part of this item relates to the following section. In addition to the general experience above, the Developer must have direct experience in developing elderly housing and ideally have experience developing affordable rental housing similar to the type of Development proposed. The Developer is expected to have in place a team comprised of individuals experienced in developing elderly housing with all or some of the design and services supports specified in the RFA.

The Applicant must describe the experience of the Developer or Principal(s) in developing affordable housing targeted to elderly residents, and any additional experience with elderly housing that serves as a platform for supportive services to assist residents to age in place. If the experience of a Principal for a Developer entity listed in this Application was acquired from a previous affordable housing Developer entity, the Principal must have also been a Principal of that previous Developer entity.

For each housing development listed, include the name, location, number of units, date constructed, current status and affiliation, how it is similar to the Development proposed, and the role played in its development by the party(ies) claiming experience with the development. Providing only a list of developments and/or units that the Developer, co-Developer, and/or Principal has developed as part of this description will not be a sufficient description of experience. The description should include the period over which each Developer and/or co-Developer's commitment to the proposed Development has been or will be maintained. Applicants' responses to this item will be limited to approximately 3-4 single-spaced typed pages.

**Experience Operating and Managing Elderly Rental Housing with Supportive Services**

**(scored item)** The Applicant will be asked to identify the entity(s) that will carry out operations and management functions at the Development and describe its experience in managing elderly rental housing with supportive services, including performing operations and management functions specific to the needs of the intended residents described by the Applicant and meeting the intent of this RFA. An eligible entity may be the Applicant, principal(s) of the Applicant and/or management company. The Applicant shall describe the role and responsibilities of the respective entity in performing the operations and management functions of the Development. The description should include the names and positions of the key staff who will be responsible for the operations and management functions, as well as their relevant qualifications and experience related to the function and in serving the intended residents. Factors that should be considered in the Applicant's description include:

- Relevancy and level of experience of the described entities and key staff in performing the operations and management of the Development in relation to the intent of the RFA and intended residents. Providing only a list of developments and/or units that the entities have managed or manages will not be a sufficient description of experience;
- Managing rental housing that serves a diverse elderly demographic as described earlier;
- Providing or making available on-site resident programs that provide education, training, social and recreation opportunities;
- Providing or making available on-site resident services including, but not limited to, resident community based services coordination, health and wellness programming, congregate meals, 24/7 staff for handling resident security and urgent issues, and transportation.
- Training for property and management staff regarding understanding elderly persons and their housing related needs, particularly as they age;
- Linkage or partnerships with the aging services network and other community-based providers that assist elders to age in place by providing programs and services related to performing activities of daily living, recreation, social well-being, health and wellness, and inclusion in the community at large;
- Addressing the accessibility and risk management needs of an intended resident population that has a higher incidence than the general population of mobility impairments, frailty and disabilities;
- Relationships with community providers and organizations for the purposes of outreach, marketing and tenant selection activities, as well as maintaining a pool of prospective applicants.

### **Enhanced Resident Community-Based Services, Program and Benefits Coordination**

**(scored item)** The coordination of on-site and community-based services and programs, as well as benefits, will be the responsibility of the Applicant, but may be in conjunction with public and/or private partnerships as approved by the Corporation in credit underwriting. The Applicant shall commit to submit a Resident Services Coordination Plan at credit underwriting. All proposed Developments will be required to assist interested residents with the coordination of their on-site and community-based short- and long-term services and programs, including health care, as well as accessing federal, state and local benefits for which they may be eligible. The purpose is to assist each resident to become aware of, access and/or maintain adequate and appropriate services and resources. It is not the intent for this resident service to take the place of services coordination already provided for a resident by a community-based services provider as part of their individual resident services plan. The focus shall be to assist residents not receiving services and program coordination by another community-based services provider, as well as to assist those residents who need additional assistance with coordination of services and programs.

In summary, services coordination will assess residents' health and social needs, identify services and resources to meet those needs, and facilitate access to and receipt of needed services. This can help ensure residents do not forgo resources that may improve their quality of life, maintain their safety in their home, support the maintenance of their health and prevent the unnecessary use of costly health resources.

Through the core “Enhanced Service and Support Coordination Model” required in this RFA, further described in the On-site Health and Wellness section, the Resident Services Coordinator must be part of a team to ensure that the entire resident population is served, providing coordination to address social and wellness (e.g., nutrition, transportation and personal care) and clinical health care needs (e.g., education, blood pressure monitoring, nutrition). In addition to traditional information and referral functions, the service coordinator will also manage more proactive tasks, such as coordinating and conducting needs assessments; developing and monitoring individual resident services plans, including relocation/transition to and from hospitals and nursing/long term care facilities; encouraging resident engagement in programs and activities; motivating resident engagement in their own health and supports management; collaborating with both on-site and community-based health care services to address resident issues; and networking with community partners.

The approved provider of this service must have a minimum of three (3) years’ experience administering and providing supportive services including outreach, information and referral services, benefits counseling, on-site and community-based services planning and coordination, and/or other related supportive services. Such experience must demonstrate that the coordination of supportive services and programming have been oriented to the needs and preferences of each resident in assisting them to access services related to health care, independent activities of daily living, financial assistance and/or benefits, and housing. In particular, the on-site staff must have an understanding of aging processes and the health care needs of older adults.

The provider of this resident service shall also provide, at credit underwriting, information demonstrating its mission, qualifications, experience, agreements and/or contracts with state and federal supportive services programs, professional staffing and experience in serving elder residents, including frail elders who need assistance with activities of daily living.

On-site and community-based services and program coordination shall be offered and made available to the residents initially and regularly and shall be voluntary to residents. Resident participation shall not be a requirement for new or continued residency. Property management and resident community-based services coordination shall not be the responsibility of the same staff persons; the functions must be entirely separate.

Provide a description of the Applicant’s plan to provide services to assist each of the Development’s residents in accessing and coordinating supportive services and other on-site and community-based resources to help meet their short and long-term needs and enable them to live stable lives in the Development. Applicant responses to these items will be evaluated based on the following criteria: (i) a description of the Applicant’s process to initially and regularly determine each resident’s need for and interest in receiving this service from the Applicant; (ii) a description of the various services and benefits coordination functions necessary to adequately and appropriately meet the intent of this service; (iii) a description of the capacity and experience of the Applicant or provider organization in carrying out the responsibilities and functions to adequately and appropriately meet the intent of this service; (iv) a description of the staffing position(s) minimum experience required to carry out each position’s duties to sufficiently meet the intent of this service; (v) a description of how this service will be conducted separately from property management functions and a plan for how many staff hours per week will be required to carry out these functions; and (vi) a description of how the Applicant’s approach to this service will lead to improvement of tenants’ health and wellness, safety, stability and quality of life.

Applicants' responses to this item will be limited to approximately 3-4 single-spaced typed pages, with up to three additional pages of appropriate exhibits, not created by the Applicant, to supplement the Applicants write-up.

### **On-site Health and Wellness Services**

**(scored item)** The provision of access to on-site health and wellness services is a core component of this RFA. This integrated approach to address resident needs for housing, health and long term services focuses on the inclusion of innovative person-centered, holistic and cost-effective interventions to coordinate care. The approach should include a strong health promotion and disease prevention focus, with an emphasis on health education, physical and cognitive fitness and self-care management. All resident participation in services described in this section is voluntary.

Applicants will be scored based on their commitment and capacity to work with partners to provide a range of services on-site to the entire resident population, focusing on the following elements: 1) strong resident services coordination that helps residents identify and address their health and supportive service needs; 2) on-site support with home and personal care needs; and 3) engagement with health care entities to help coordinate and manage health care needs.

At a minimum, Applicants must commit to contract with partners to implement the strategy in I. below, and may choose to add the strategy described in II. to provide more robust health and wellness care services. The Corporation will score an Applicant's comprehensive response to this section based on the criteria outlined below.

- I. To receive financing through this set-aside, Applicants are required to employ a core "Enhanced Service and Support Coordination Model." To be eligible to receive points in this part of the Application, Applicants must describe how this model will be implemented at the proposed Development. This model pairs the functions described in the *Enhanced Resident Community-Based Services, Program and Benefits Coordination* section with on-site nursing staff to address the specific wellness and clinical needs of residents. Together these functions will operate as an interdisciplinary team to jointly meet residents' collective needs. The team will address social resource and support needs, provide health education and health monitoring and act as a liaison with on-site or community-based primary care and other providers. The team will more intensively follow higher-risk residents who may require more frequent monitoring and ongoing engagement to help ensure needs are addressed.

The on-site nurse will conduct wellness activities, including health, mental health and functional assessments and health education and, as needed, monitoring of vital signs, liaisons with health care providers, assists with medication management and monitoring of transitions home following hospital visits. The nurse must be trained on social supports available and on how to work with persons with behavioral health issues.

- II. An Applicant may receive additional points by incorporating an on-site home care services strategy into the Development's on-site health and wellness services. In addition to the on-site nursing presence outline in I. above, to implement this strategy, the Applicant must implement one or more formal partnerships to place home and personal care aides on-site, allowing them to care for multiple residents living at the housing property at the same time. Services must be provided by home or personal care aides through the formal partnership with one or more



outside entities. Funding for the services may come from a variety of sources, such as Medicaid, endowments, private pay sliding scales, etc.

To provide these comprehensive services, Applicants should develop linkages between primary, home health and/or behavioral health providers through one or more intentional partnerships with such entities to bring health care services to the property. “Managed care organizations” are administrators of Medicaid funded services in Florida, and will be critical partners for this strategy. Additional health care entities may include local hospital systems, doctors’ groups practicing in the local area, home health care agencies, a local federally qualified health center or other approach. Applicants are expected to have a formal agreement with the health provider to provide space at the property for health care visits/clinics and/or office space and to share information and work together to assist and support residents.

These services are expected to be carried out by partner health care providers and may not be managed by the Applicant. However, the Applicant should discuss how the health care services discussed in this section will be coordinated with property management functions to provide seamless support and operations at the property.

Provide a description of the Applicant’s approach to provide access to on-site health and wellness services. Applicant responses to these items will be evaluated based on the following criteria: (i) a description of the Applicant’s approach to employ a core “Enhanced Service and Support Coordination Model” at the property, described in I. above, including how nursing staff will address the specific wellness needs of residents and pair with staff providing the enhanced services, program and benefits coordination function to serve all residents; (ii) if the Applicant chooses, a description of how an on-site home care services strategy will be blended with the core model described in II. above; (iii) a description of how the Applicant will set up formal linkages through one or more intentional partnerships with primary, home health and/or behavioral health providers to bring health care services to the property; (iv) a description of the capacity and experience of the provider organization(s) in carrying out the responsibilities and functions to appropriately meet the intent of proposed services, a description of the roles of each, and a plan for how many staff hours per week will be required to carry out these functions; and (v) evidence of any formal partnerships that have been entered into for this purpose by the time of Application.

Applicants’ responses to this item will be limited to approximately 3-4 single-spaced typed pages, with up to three additional pages of appropriate exhibits, not created by the Applicant, to supplement the Applicants write-up.

### **Access to Community-Based Services**

**(scored item)** The ability of elderly persons to effectively and efficiently access services and resources in their community is vital to assist these households in obtaining and maintaining a level of choice, independence and inclusion in the community desired by each. The intent of this RFA is to facilitate the availability of certain healthcare and supportive services on-site, but access to other services and resources off-site will be vital for residents to successfully age in place. These include general services and resources like stores and shopping centers for groceries, clothing, medicine, and other household and personal items. They may also include, but are not limited to, public and private resources such as parks, libraries, senior centers, higher education and training facilities, as well as restaurants and

entertainment venues. Others are more specific to meeting the healthcare, wellness and supportive services needs of the intended residents. These include, but are not limited to, healthcare facilities, medical and dental offices, and ancillary health centers. Access to supportive services such as home health and personal care assistance, meal preparation, and housekeeping are especially important to address the acute and long term needs of elderly persons who may choose to seek these services somewhere other than those provided on-site.

To be eligible to receive points for this section, Applicants will be asked to provide a detailed description of the intended residents' access to general, healthcare and services in their community to meet the needs of the intended residents and their ability to effectively and efficiently access each described service and resource. Applicant responses to these items will be evaluated based on the variety of services and resources available to meet the needs of the intended residents; geographic proximity of the services to the Development; and reasonable and efficient options for convenient transportation that allow residents with a range of abilities to access services and be part of their community.

Effective and efficient transportation is an important feature to enable low income elderly residents to age in place. The transportation must be available to provide door-to-door service to the above described community services and resources. The available transportation services should not only be available on a regularly scheduled and frequent basis, but should also be flexible and be able to be customized to residents' needs. This RFA requires the Applicant to provide, or make available through formal agreements, private transportation services that may be in addition to public transportation services for residents.

## **ELDERLY TRANSFORMATIVE PRESERVATION ITEMS REQUIRED AT CREDIT UNDERWRITING**

If awarded financing, a development must provide the following items at some point in credit underwriting (not inclusive):

- **Resident Relocation Plan during the Development's Rehabilitation:** The Applicant shall develop and implement a plan and timeline for resident relocation during the Development's rehabilitation. The plan and timeline must be approved by the Corporation in Credit Underwriting. The plan shall describe the approach to appropriately, adequately and safely relocate residents when they are directly affected by rehabilitation of their dwelling unit and common areas. The plan shall provide information regarding the relocation site; accommodations relevant to the needs of the residents and length of time residents will be displaced; moving and storage of the contents of a resident's dwelling units; as well as the approach to inform and prepare the residents for the rehabilitation activities. The Corporation will provide guidelines at Credit Underwriting to assist each Applicant in developing and drafting a Resident Relocation Plan.
- **Outreach, Marketing and Tenant Selection:** The Applicant shall develop and implement a plan for tenant outreach, marketing, and selection to be provided during the credit underwriting

process and approved by the Corporation. The plan shall describe the Applicant's initial and ongoing approach, policies and procedures to:

- Make aware and inform the intended residents, relevant community service providers and stakeholders, and the general public about the Development;
- Implement and sustain application and referral approaches and processes for prospective residents;
- Select applicants for residency, as well as establish and maintain a waitlist.

The Applicant will be required to specify its approach and activities to coordinate with the Area Agency on Aging and its aging services network in the area where the Development is located to develop and retain an applicant pool of prospective residents. The plan shall also specify other relationships with community-based healthcare and supportive services providers to establish and manage of system of referring persons served by these entities to the Development for residency. Florida Housing will provide guidelines at credit underwriting to assist each Applicant in developing and drafting the plan.

- **Capital Needs Assessment:** As with any Preservation development, this will be required to be carried out by a third party vendor hired by the credit underwriter.
- **Credit underwriting requirements outlined in the RFA** (all awardees must meet these requirements)

## **OTHER REQUIREMENTS IN ELDERLY TRANSFORMATIVE PRESERVATION PROPERTIES**

### **Accessibility Universal Design and Visitability Features**

All common space and dwelling units of the proposed Development must meet all federal requirements and state building code requirements, as applicable, including the following:

- 2012 Florida Accessibility Code for Building Construction as adopted pursuant to Section 553.503, Florida Statutes;
- The Fair Housing Act as implemented by 24 CFR 100;
- Titles II and III of the Americans with Disabilities Act of 1990 as implemented by 28 CFR 35, incorporating the most recent amendments, regulations and rules.

For purposes of the Housing Credit Program, a Housing Credit allocation shall be deemed "Federal financial assistance" within the meaning of that term as used in Section 504 of the Rehabilitation Act of 1973 as implemented by 24 CFR Part 8 for all Housing Credit Developments.

The Applicant shall commit, without exception, to all dwelling units having the following features:

- Primary entrance door shall have a threshold with no more than a ½-inch rise;
- All door handles on primary entrance door and interior doors must have lever handles;
- Lever handles on all bathroom faucets and kitchen sink faucets;
- Toilets must be 17 inches to 19 inches in height as measured from the finished floor to the top of the toilet seat;

*Summary Discussion Points for the June 10, 2014, Workshop  
(Information Subject to Change)*

- Fifteen (15) percent of the units must have roll-in showers in the bathroom. This percentage may not include fully accessible units;
- Horizontal grab bars in place around each tub and/or shower, the installation of which meets or exceeds 2010 ADA Standards for Accessible Design, Section 609. In addition, the following standards for grab bars are required:
  - o If a bathtub/shower combination with a permanent seat is provided, grab bars shall be installed to meet or exceed 2010 ADA Standards for Accessible Design, Section 607.4.1;  
If a bathtub/shower combination without a permanent seat is provided, grab bars shall be installed to meet or exceed 2010 ADA Standards for Accessible Design, Section 607.4.2; If a roll-in shower is provided, grab bars shall be installed to meet or exceed 2010 ADA Standards for Accessible Design, Section 608.3.2;
- Reinforced walls for future installation of horizontal grab bars in place around each toilet, the installation of which meets or exceeds 2010 ADA Standards for Accessible Design, Section 604.5.1 (Side Wall);
- Roll-out shelving or drawers in all bottom bathroom vanity cabinets;
- Adjustable shelving in master bedroom closets (must be adjustable by resident);
- In at least one of the kitchen's bottom or base cabinets, there shall be a large drawer that has full extension drawer slides;
- Mid-point on light switches and thermostats shall not be more than 48 inches above finished floor level;
- Cabinet drawer handles and cabinet door handles in bathroom and kitchen shall be lever or D-pull type that operate easily using a single closed fist;
- Minimum of 60 inches diameter of unobstructed space in living room and one bedroom in order to provide adequate maneuvering and turning space for a person using a wheelchair or walker. This requirement means that 60 inches in diameter of unobstructed space shall be free of hard-constructed features and/or fixtures and does not apply to resident furnishings or possessions; a
- Clear floor space of at least 30 inches x 48 inches outside swing of door as it is closed shall be provided at bathtub/shower fixtures. This clear floor space allows space for a parallel approach to the bathtub, as well as access for transferring into and out of the bathtub;
- At least 10 percent of the total dwelling units must provide mobility features that comply with the Residential Dwelling Units sections of the 2010 ADA Standards for Accessible Design; and
- At least 5 percent of the total dwelling units shall provide the communications features that comply with the Residential Dwelling Units with Communication Features section in the 2010 ADA Standards for Accessible Design.

### **Green Building Features**

The green building requirements will include features that reduce cost, save energy and resources and promote occupant health. For elderly households who will potentially be in their units for a large portion of the day, indoor air quality is very important. The following list includes features common to recent RFAs by Florida Housing, keeping in mind the population who will live in the properties financed through this RFA:

- Low or No-VOC paint for all interior walls (Low-VOC means 50 grams per liter or less for flat; 150 grams per liter or less for non-flat paint);

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- Low-flow water fixtures in bathrooms—WaterSense labeled products or the following specifications:
  - Toilets: 1.6 gallons/flush or less,
  - Faucets: 1.5 gallons/minute or less,
  - Showerheads: 2.2 gallons/minute or less;
- Energy Star qualified refrigerator;
- Energy Star qualified ventilation fan in all bathrooms;
- In unit air conditioners must be Energy Star qualified or have a minimum SEER of 14;
- Caulk, weather-strip, or otherwise seal all holes, gaps, cracks, penetrations, and electrical receptacles in building envelope; and
- Seal and insulate heating and cooling system ducts with mastic or metal backed tape.

**Resident Programs**

None will be required.

**MANDATORY ITEMS IN THE RFA TO BE ELIGIBLE FOR A FINANCING AWARD**

*(see Outline of SAIL RFA Application Criteria for more information)*

**General Information ALL Applicants must provide**

- Maximum SAIL request amount
  - SAIL Request: The lesser of a specific dollar amount per unit or a total maximum dollar amount, to be determined by the Corporation; and
  - ELI Gap Loan: All Applications are eligible for ELI Gap Loan funding for the required ELI Set-Aside units, not to exceed 15 percent of the total units for Elderly Transformative Preservation Applications, or 10% for Family or Elderly Applications. Funding will be in the form of a forgivable loan.
- Demographic commitment selection
- Applicant information
- Principals of Applicant entity
- Contact person
- Developer name(s) and other information
- Development information and location
- Total affordability period
- Unit mix
- Proof of site control
- Local government contribution (not required for Elderly Transformative Preservation)
- Developer and general contractor fee information
- Requirement to use SAIL funding in conjunction with Tax-Exempt Bonds and Non-Competitive 4% Housing Credits (see timing requirements for evidence of or application for Bond financing and submission of application for Non-Competitive 4% Housing Credits)
- Documentation of non-Corporation funding

**Applicants must execute an Applicant Certification and Acknowledgement**

- Outlines some of the Applicant’s key commitments and responsibilities if selected for funding
- Elderly Transformative Preservation awardees will, as a condition of the acceptance of funding under either RFA, be required to cooperate with the Corporation or any contractors affiliated with the Corporation in the evaluation of the effectiveness of Elderly Transformative Preservation provided through the RFAs. The Corporation is interested in collecting evidence to demonstrate the extent to which these Developments meet expected outcomes, including but not limited to:
  - The public cost savings of housing linked with coordinated supportive services as alternatives to assisted living facilities and nursing homes; and
  - Whether access to on-site health services, along with affordable housing, leads to better health, improved social relationships and stability in the family and community.

The Corporation may pursue the option to direct an independent evaluation, and in the course of the evaluation, may require awardees to submit administrative and other data to assess the effectiveness of the Development.

**NEXT STEPS AND TIMELINE**

*(Dates subject to change!)*

- Early/mid July 2014 – Publish first SAIL RFA Draft
- Mid/late July 2014 – Hold SAIL RFA telephonic workshop
- Early August 2014 – Publish second SAIL RFA Draft
- Mid/late August 2014 – Issue RFA
- Mid/late September 2014 – Applications due
- October 30, 2014 – Recommendation to Board