

# RELOCATION PLAN TEMPLATE

Name of Development	Application #
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Submitted Relocation Plans shall follow this Template and its numbering conventions. Failure to do so will result in delays in approval from Florida Housing. Provision of the Relocation Plan must be submitted and approved before the final credit underwriting report.

1. Activity Summary
  - A. Projected timeline - Provide dates for each of the following:
    - a. Construction of new Development.
    - b. Demolition of existing Development
    - c. Construction/Redevelopment of Development
  - B. List of each building to be newly constructed and redeveloped with street addresses.
  - C. List changes from current to proposed unit mix (bedroom size, AMI designation, unit count)
  - D. Describe the steps of the planned relocation process with primary activities and dates.
2. Expected Resident Impact:
  - A. Number of existing residents to be temporarily relocated.
  - B. Create a list with household names, unit numbers, unit types, amount of rent, lease start dates, and lease end dates. Submit this as an attachment, labeled "Attachment One."
  - C. Create a household composition chart with the following information. Submit this as an attachment, labeled "Attachment Two."
    - i. Number of residents ages 62+
    - ii. Number of residents ages 55-61
    - iii. Number of residents ages 21-54
    - iv. Number of residents ages 20 and under
    - v. Total number of residents
    - vi. Average household size
  - D. Describe the Accessibility needs of existing residents.
3. Projected Timeline for Communication to Residents: Provide dates for each of the following resident communications:
  - A. List specific required notices and the date required notices will be or were sent to residents.
  - B. Method of notice distribution
  - C. Dates for other resident communications:
    - a. Interviews – Projected dates
    - b. Surveys – Projected dates
    - c. Meetings – Projected dates:
    - d. Note: Copies of notices and resident communications shall be submitted with the Relocation Plan during credit underwriting. Meeting agendas, sign-in sheets of participants in meetings/interviews; and copies of tenant notices will be required.

4. Overall Relocation Activities. Answer each question. Use corresponding numbers for each answer (4.a, etc.):
  - i. How will resident eligibility for relocation benefits be determined?
  - ii. How will residents be assisted with relocation preferences?
  - iii. Describe the procedures for residents to obtain their relocation benefits and payments.
  - iv. Who will coordinate the relocation process?
  - v. Describe plans to accommodate households that may be precluded from returning due to proposed unit mix, rent-burdened (more than 30% of average gross monthly income), or LIHTC eligibility. Projected number of such households.
  - vi. Describe what measures will be taken to provide the required replacement housing to existing residents who may be hard to house because of family size, economic status, or social problems.
  - vii. Provide a copy of the resident relocation tracking system. Include the date tracking of existing residents begins and the length of tracking time anticipated.
5. Actual moving costs and related expenses. Provide a line-item list for specific “moving costs” such as transportation of household and personal property; packing and unpacking personal property; moving and re-installing appliances, temporary storage of personal property, transfer of utilities, etc. Include the funding source for each moving cost item.
6. Relocation Budget. Provide Applicant’s overall budget for relocation activities, in addition to the moving costs. This could include staff expenses, additional office space, and other resource needs. Provide these in a line-item format with costs and funding sources.
7. Staffing Resource Needs. Describe the staff that will conduct relocation activities. Indicate if current employees will be used, if additional employees will be hired, or if third-party professionals or contracted staff will be hired. These staffing resources should be included in the Relocation Budget in #6 above.
8. Case Management. Case Management and supportive services are required to be offered. These services shall begin immediately upon acceptance of the invitation to credit underwriting. Case Management shall be performed with a service coordination approach that coordinates multiple support services available in the community that will support housing stability.
  - A. Describe how the Case Management shall be coordinated with relocation counseling and resident advisory services to ensure that relocation staff and case managers are collaborating to support successful relocation.
  - B. Describe how provisions will be made for those residents who are “hard to house” or otherwise in high need. Procedures shall be provided for those “hard to house” residents due to family size, economic status, disability, or other high-need circumstances.
  - C. What case management and supportive services will be provided?
  - D. Who will coordinate the case management and supportive services?
  - E. What is the projected length of the case management and supportive services?
9. Uncertainties and contingency plans
  - A. Describe budget allotment for contingencies.
  - B. Identify any uncertainties and describe plan for what will be done in those cases.