FLORIDA HOUSING FINANCE CORPORATION

Modification of Request for Applications (RFA) 2025-215 Live Local SAIL Financing For Developments Near Military Installations

Pursuant to Rule 67-60.005, F.A.C., Modification of Terms of Competitive Solicitations, Florida Housing hereby modifies Section Four, A. 2. b. of the RFA as follows:

b. Lead Agency(ies) Partnerships

The Applicant will be expected to partner with the appropriate lead agency(ies) serving the intended residents in the area where the property is located. The lead agency partners must serve all the residents of the Development described in 2.a. including the Active Duty military or Veterans, the ELI Units for Veterans Experiencing Homelessness and, if applicable, the general public. These partners could include, but are not limited to, the military housing office, Military and Family Support Center offered through the military installation in the area, Department of Veterans Affairs, Supportive Services for Veteran Families program (SSVF), providers of mental health services, providers of Medicaid managed care, providers of disability services or Public Housing Authorities.

~~It is expected that the Applicant will form partnerships with a lead agency(ies), so that agency may provide the Development with referrals from their pool of eligible households and/or coordinate with the Development regarding services provided by the lead agency(ies) or another provider within the lead agency's network.~~

The Applicant must maintain (i) a Memorandum of Understanding (MOU) with a Lead Agency(ies) that serves Active-Duty Personnel and/or Veterans (Veterans that are not Homeless) and also (ii) a separate MOU with a Lead Agency that serves Veterans Experiencing Homelessness. If appropriate, a Lead Agency that serves both Veterans Experiencing Homelessness and Active-Duty Personnel and/or Veterans may execute both required MOUs.

~~At least one Memorandum of Understanding (MOU) with at least one of the Agencies serving the Development's area~~ The MOUs to serve both demographic set-asides (Active Duty and/or Veterans that are not Homeless; and Veterans Experiencing Homelessness) must be executed and submitted to the Corporation for approval as outlined in Exhibit D. The following MOU ~~is~~ templates are available on the RFA Webpage:~~.~~

- Memorandum of Understanding for Agency Partnerships Providing Community-based Support Services to Active Duty and/or Veteran Residents of the Development
- Memorandum of Understanding for Agency Partnerships Providing Community-based Support Services to Veterans Experiencing Homelessness now residing in the Development

Pursuant to Rule 67-60.005, F.A.C., Modification of Terms of Competitive Solicitations, Florida Housing hereby modifies Section Four, A. 3. F. of the RFA as follows:

f. Contact Person

(1) Enter the information for the required Authorized Principal Representative. The Authorized Principal Representative must meet the following criteria:

(a) Must be a natural person Principal of the Applicant listed on the Principals Disclosure Form;

(b) Must have signature authority to bind the Applicant entity;

(c) Must sign the Applicant Certification and Acknowledgement section of Exhibit A; and

(d) ~~Must sign the Florida Housing Finance Corporation Resident Community-Based Services Coordination Provider Or Principal Of Resident Community-Based Services Coordination Provider Certification form (Form Rev. 10-2021), if provided; and~~

~~(e)~~ If funded, will be the recipient of all future documentation that requires a signature.

Pursuant to Rule 67-60.005, F.A.C., Modification of Terms of Competitive Solicitations, Florida Housing hereby modifies Section Four, A. 9. of the RFA as follows:

9. Resident Programs

All Applicants must commit to at least three of the Resident Programs in a. below, ~~one of~~ the Demographic Resident Services Coordination described in b. below, and the Resident Services Coordination for ELI Units for Veterans Experiencing Homelessness described in c. below. The availability of the Resident Programs must be publicized on an ongoing basis such as through community newsletters, bulletin board posts, or flyers.

a. Applicants must select at least three of the resident programs outlined below. The eligible resident programs which may be selected are as follows:

(1) After School Program for Children

This program requires the Applicant or its Management Company to provide supervised, structured, age-appropriate activities for children during after school hours, Monday through Friday. Activities must be on-site.

(2) Health and Wellness Program

Applicant or its Management Company must provide, at no cost to the resident, on-site health and wellness services quarterly. Services should include, but not be limited to, clinical health care needs such as blood pressure monitoring, pulse, temperature, cholesterol, glucose and other wellness screenings, as well as health education and nutrition. Applicant or its Management Company must partner with community health care providers and provide the space for services to be delivered, including offices for a service coordinator, nurse and other health or social services providers. Space must also be provided for group health education.

(3) Employment Assistance Program

The Applicant or its Management Company must provide, at no cost to the resident, a minimum of quarterly scheduled Employment Assistance Program workshops/meetings offering employment counseling by a knowledgeable employment counselor. Such a program includes employability skills workshops providing instruction in the basic skills necessary for getting, keeping, and doing well in a job. The instruction must be held between the hours of 8:00 a.m. and 7:00 p.m. and include, but not be limited to, the following:

- Evaluation of current job skills;
- Assistance in setting job goals;
- Assistance in development of and regular review/update of an individualized plan for each participating resident;
- Resume assistance;
- Interview preparation; and
- Placement and follow-up services.

If the training is not provided on-site, transportation at no cost to the resident must be provided. Electronic media, if used, must be used in conjunction with live instruction.

(4) Financial Management Program

The Applicant or its Management Company shall provide a series of classes to provide residents training in various aspects of personal financial management. Classes must be held at least quarterly, consisting of at least two hours of training per quarter, and must be conducted by parties that are qualified to provide training regarding the respective topic area. If the Development consists of Scattered Sites, the Resident Program must be held on the Scattered Site with the most units. Residents residing at the other sites of a Scattered Site Development must be offered transportation, at no cost to them, to the classes. The topic areas must include, but not be limited to:

- Financial budgeting and bill-paying including training in the use of technologies and web-based applications;
- Tax preparation including do's and don'ts, common tips, and how and where to file, including electronically;

- Fraud prevention including how to prevent credit card and banking fraud, identity theft, computer hacking and avoiding common consumer scams;
- Retirement planning & savings options including preparing a will and estate planning; and
- Homebuyer education including how to prepare to buy a home, and how to access to first-time homebuyer programs in the county in which the development is located.

Different topic areas must be selected for each session, and no topic area may be repeated consecutively.

(5) Homeownership Opportunity Program - Applicant commits to provide a financial incentive which includes the following provisions:

- The incentive must be applicable to the home selected and may not be restricted to or enhanced by the purchase of a home in which the Applicant, Developer, or other related party has an interest;
- the incentive must be not less than 5 percent of the rent received by the owner for the unit during the entire occupancy by the household (Note: The incentive will be paid for all months for which the household is in compliance with the terms and conditions of the lease. Damages to the unit in excess of the security deposit will be deducted from the incentive.);
- the benefit must be in the form of a gift or grant and may not be a loan of any nature;
- the benefits of the incentive must accrue from the beginning of occupancy;
- the vesting period can be no longer than 2 years of continuous residency; and
- no fee, deposit or any other such charge can be levied against the household as a condition of participation in this program.

b. Demographic Resident Services Coordination

In addition to the selection of three general programs above, there must be an active component of Resident Services Coordination that links the residents to specific services located in the community.

This ensures that the tenants benefiting from this housing are served by organizations that have experience or contract with someone that connects residents to services and resources that are beneficial to the residents. The intent of these services is that they are voluntary for the residents but available onsite or are easily accessible within the community.

The Applicant will be expected to partner with the appropriate lead agency(ies) serving the intended residents in the area where the property is located. The lead agency partners must serve all the residents of the Development described in 2.a. including the Active Duty military or Veterans, the ELI Units for Veterans Experiencing Homelessness and, if applicable, the general public. The services may be related to a household's income, benefits, education/training, healthcare, legal needs, childcare, housing counseling, etc. These services must be provided on-site or the development must provide transportation to these services within the community at least twice weekly. The agency partnerships are expected to provide the Development with referrals from their pool of eligible households and/or coordinate with the Development regarding services provided by the agency or another provider that will serve the intended population as described in the Demographic Commitment in 2.a. above. These partners could include, but are not limited to, the military housing office, Military and Family Support Center offered through the military installation in the area, Department of Veterans Affairs, Supportive Services for Veteran Families program (SSVF), providers of mental health services, providers of Medicaid managed care, Centers for Independent Living, or Public Housing Authorities.

The owner must execute a Memorandum of Understanding (MOU) with at least one of the partner agencies serving the Development's location. The Development may have a partnership with more than one of the agencies, but a separate MOU must be executed for each agency. The provision of community-based Services Coordination 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. All proposed Developments will be required to assist interested residents with the coordination of their community-based services. The purpose is to assist each resident to become aware of, access and/or maintain adequate and appropriate community-based services and resources.

Community-based Services Coordination shall be offered and made easily available within the community and at no charge to the residents initially and regularly, and resident participation shall be voluntary. If the proposed Development consists of Scattered Sites, the community-based Services Coordination shall be equally available to residents of each unit on each Scattered Site. Resident participation shall not be a requirement for new or continued residency. The Applicant shall commit to submit a Resident Community-Based Service Coordination Plan at credit underwriting. The Resident Community-Based Service Coordination Plan shall adhere to guidelines developed by the Corporation, in conjunction with state agencies, or their designee(s), that administer publicly funded supportive services for the intended residents.

The approved provider of this service must have a minimum of five years' experience administering and providing supportive services including outreach, information and referral services, benefits counseling, community-based services planning and coordination, and/or other related supportive services. Such experience must demonstrate that the supportive services listed above have been oriented to the needs and preferences of each intended resident in assisting them to access services related to health care, independent activities of daily living, employment, income and housing. 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 the intended residents described in question 2.b. and question C.1. of Exhibit A.

Property management and resident community-based Services Coordination should not be the responsibility of the same staff persons; the functions must be entirely separate.

~~One of the following must be met.~~

~~(1) Applicants that do not meet the requirement described in b.(2) below may partner with a provider of supportive services that includes Resident Community-Based Services Coordination for the intended Demographic. An entity, that meets the qualifications to provide Resident Community-Based Services Coordination, pursuant to this RFA, may partner with the Applicant to provide the Development's Resident Community-Based Services Coordination. The Applicant must provide the properly completed and executed Florida Housing Finance Corporation Resident Community-Based Services Coordination Provider Or Principal Of Resident Community-Based Services Coordination Provider Certification form (Form Rev. 10-2021) *, as **Attachment 6**. This form must be signed by the Authorized Principal Representative.~~

~~**OR**~~

~~(2) At least one natural person Principal within the Applicant entity structure must have experience owning and operating a minimum of two Permanent Rental Housing developments that provides a Resident Community-Based Services Coordination. To meet this requirement, Applicants will be required to list the properties that serve individuals and families in Exhibit A, and there must be a combined total number of units within the properties that equals no less than 50 percent of the total number of units in the proposed Development.~~

Note: The Applicant shall submit a Resident Community-Based Service Coordination Plan at credit underwriting. In credit underwriting, the provider must demonstrate it has been in business and performing Services Coordination for at least five consecutive years before the date of Application submission, and the Applicant must provide the legal contract demonstrating the partnership with the service provider.

*Forms are available on the RFA Webpage.

c. Required Resident Services Coordination for ELI Units for Veterans Experiencing Homelessness

In addition to a. and b. above, within the Resident Community-Based Service Coordination Plan, there must be an active component of Resident Services Coordination that links the residents to specific community services directly related to helping households obtain and/or maintain their permanent housing stability and self-sufficiency needs, goals, and expectations. The services may be related to a household's income, benefits, education/training, healthcare, legal needs, (representative payee) childcare, housing counseling, or ability to meet its activities of daily living.

These services must be provided on-site or the development must provide transportation to these services within the community at least twice weekly.

Pursuant to Rule 67-60.005, F.A.C., Modification of Terms of Competitive Solicitations, Florida Housing hereby modifies Section Five, A. 1. of the RFA as follows:

1. Determining Eligibility

Only Applications that meet all of the following Eligibility Items will be eligible for funding and considered for funding selection.

Eligibility Items
Submission Requirements met*
Verification that the Applicant has not closed on the Tax-Exempt Bond financing prior to the Application Deadline
Name of Applicant provided
Evidence Applicant is a legally formed entity qualified to do business in the state of Florida as of the Application Deadline provided
Name of Each Developer provided
Evidence that each Developer entity is a legally formed entity qualified to do business in the state of Florida as of the Application Deadline provided
Developer Experience Requirement met
Principals for Applicant and Developer(s) Disclosure Form provided and meets requirements
Contact information for Management Company provided
Prior Management Company Experience requirement met
Authorized Principal Representative provided and meets requirements
Name of Proposed Development provided
Development Type provided
Unit Characteristic Chart reflecting the breakdown of number of units associated with each Development Type, Development Category and ESS/Non-ESS provided
County identified
Military Installation identified
Distance between Development Location Point and Main Entrance of Military Installation identified
Address of Development Site provided
Question whether a Scattered Sites Development answered
Development Location Point provided
Latitude and Longitude Coordinates for any Scattered Sites provided, if applicable
Total Number of Units provided and within limits
Minimum Set-Aside election provided
Total Set-Aside Breakdown Chart properly completed
Unit Mix provided and meets requirements
Number of residential buildings provided
Evidence of Site Control provided
Green Building Certification selected

Minimum Resident Programs selected
~~Housing Stability Services and Access to Community-Based Services Coordination Experience Requirements met~~
Eligible SAIL Request Amount provided and meets minimum request amount
Applicant's 4% Housing Credit Request Amount, if applicable
Applicant's MMRB Request Amount (if Corporation-issued Bonds) or Bond Request Amount and Other Required Information (if Non-Corporation-issued Bonds), if applicable
Development Cost Pro Forma provided showing sources that equal or exceed uses
Applicant Certification and Acknowledgement signed by Authorized Principal Representative
Financial Arrearage Requirement met**
Verification of no prior acceptance to an invitation to enter credit underwriting for the same Development ***
Verification of no recent de-obligations ****

* Submission Requirement

To be eligible for funding, the following submission requirements must be met: (i) the Application must be submitted online by the Application Deadline, and (ii) the required Application fee must be submitted as of the Application Deadline.

** Financial Arrearage Requirement

An Application will be deemed ineligible for funding if, as of close of business ***two business days**** before the Committee meets to make a recommendation to the Board there remains any financial obligations for which an Applicant or Developer or Principal, Affiliate or Financial Beneficiary of the Applicant or Developer is in arrears to the Corporation or any agent or assignee of the Corporation as reflected on the most recently published Past Due Report.

The most recently published Past Due Report is posted to the Corporation's Website under the link https://www.floridahousing.org/data-docs-reports/past-due-reports (also accessible by clicking here), but not more recently than seven business days prior to the date the Committee meets to make a recommendation to the Board.

* For example, if a review committee meeting is held on a Wednesday, regardless of the time of the meeting, the arrearages must be paid by Monday close of business.

*** Previous Funding Requirements

Requirement that there can be no prior acceptance to an invitation to enter credit underwriting for the same Development

An Application will be deemed ineligible for funding if the Applicant has accepted an invitation to enter credit underwriting for the same Development (with the exception of funding awarded under the Predevelopment Loan Program (PLP) and/or the Elderly Housing Community Loan (EHCL) program) and, as of Application Deadline for this RFA, the funding has not been returned to the Corporation. If the acceptance to an invitation to enter credit underwriting occurs after the Application Deadline and before the Review Committee Meeting for this RFA, the proposed Development will be considered ineligible for funding in this RFA. If the acceptance to an invitation to enter credit underwriting occurs after the Review Committee Meeting for this RFA, the proposed Development will be considered ineligible for funding in this RFA and any funding awarded in this RFA will be rescinded and considered Returned Funding and disposed of according to Section Five B. of the RFA.

**** Verification of no recent de-obligations

An Application will be deemed ineligible to be considered for funding if, as of the close of business the day before the Committee meets to make a recommendation to the Board, an Applicant or Developer or Principal, Affiliate or Financial Beneficiary of the Applicant or Developer has received an award of any funding from any RFA issued by Florida Housing Finance Corporation but such funding has been de-obligated by the Florida Housing Finance Corporation Board of Directors within the ten years prior to this RFA Application Deadline, with the exception of de-obligations that resulted from the termination of the Multifamily Energy Retrofit Program (MERP) funding awarded through RFA 2015-115.

Pursuant to Rule 67-60.005, F.A.C., Modification of Terms of Competitive Solicitations, Florida Housing hereby modifies Item 4. of Exhibit D of the RFA as follows:

4. The Applicant will submit the fully executed MOU for Agency Partnerships providing Community-based Support Services for the Corporation's approval and the Resident Community-Based Service Coordination Plan within nine months of the issuance of the invitation to enter credit underwriting, as described in Section Four, A.2.b. of the RFA;

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