

Social Service Plan Checklist

I. Social Services Plan

- A. The plan must address how the project will promote residential opportunities that are integrated into the neighborhood or the community. ☐
- B. The social services plan should address, but is not limited to, the following items:
1. A description of the eligible targeted population(s), including criteria that will qualify proposed tenants and support services likely to be required. ☐
 2. Support services that are appropriate for the targeted population. ☐
 3. Description of how the services will be delivered. ☐
 4. Description of tenant/landlord relationships, including roles of the service provider and developer in tenant/landlord relationships. How prospective tenants will be recruited, screened, and selected, and the plan for problem resolution to minimize evictions for supportive housing tenants. ☐
 5. Services should be available to all tenants in a project, even if they are not utilized by all tenants. ☐
 6. Sponsor must provide a detailed budget of how the services will be funded (services cannot come from the operations of a project) for each eligible targeted population
 7. Sponsor must provide evidence of rental subsidy and/or operating subsidy prior to the HMFA consideration for a mortgage commitment
- C. Services should be designed to assist individuals and families to maintain their housing and/or residential opportunity.
1. Describe how services will be coordinated or made available to all special-needs tenants. ☐
 2. Social Service Coordinator
 - a. If a social service coordinator is being provided through a third party, a signed agreement between the two parties is required. ☐
 - b. The coordinator must be dedicated to the tax credit project for 20 hours per week. For projects that have set aside 5% of the units for supportive housing units, a minimum of five hours per week is required (10 hours per week is recommended). ☐
 3. Description of the proposed services, including:
 - a. How services respond to the need areas of tenants. ☐
 - b. Service location (on-site or in the community). ☐
 - c. Include a listing of referral resources. ☐

4. Appropriate and necessary services shall be supported by:

- a. Evidence-based practice. ☐
- b. Research and/or ☐
- c. Direct practice experience. ☐

II. Consumer Choice

A. The social services plan shall demonstrate how tenants will have the opportunity to participate in formulation of their:

- 1. Individualized services plan. ☐
- 2. Service goals. ☐
- 3. Choice of services. ☐

III. Tenant Selection

A. Describe the tenant selection policy.

- 1. Indicate how the housing and supportive service needs of tenants will be assessed, including the relevant assessment tools or methods. ☐
- 2. If the plan proposes to restrict occupancy to any group, explain why the restriction is necessary. ☐
- 3. Identify tenant referral sources. ☐

B. A description of tenant/landlord relationships, including:

- 1. Roles of the service provider and developer in tenant/landlord relationships. ☐
- 2. Detailed eligibility and ineligibility criteria for tenant selection and screening — i.e., what disqualifies a prospective tenant. ☐
- 3. The plan for problem resolution to minimize evictions for supportive housing tenants. ☐

IV. Capacity

A. The plan must:

- 1. Describe and demonstrate capability. ☐
- 2. Describe and demonstrate experience of the social service provider in providing housing and/or supportive and social services to the target population or a relevant special-needs population. ☐

B. The plan shall include a description of:

- 1. The service provider's capacity and planned activities to address:
 - a. Bi-lingual needs. ☐
 - b. Cultural competency. ☐
 - c. Other special-needs accommodations, including accessibility features for the tenants/residents of the project. ☐

V. Performance Measures

- A. The plan must include performance measures, including:
1. Quality of life. ☐
 2. Consumer satisfaction. ☐
 3. Employment and education. ☐
 4. Ability to live independently. ☐
 5. Methodology for evaluation of tenant/resident housing and service outcomes. ☐
- B. For any project that serves a homeless population, the Sponsor/Owner must assure that the project reports in the New Jersey Statewide Homeless Management Information System (“HMIS”) administered by the Agency. ☐

VI. Executed Service Agreements

- A. If the special-needs housing project sponsor is not providing the social services directly, the sponsor must provide evidence of an executed service provider agreement. The agreement(s) must conform to the Agency’s Memorandum of Understanding.
- B. If the social service provider is partnering with other community services, that relationship must be substantiated with executed letters of agreement detailing the services to be provided and the term thereof.
- C. If, during the tax credit compliance monitoring period, the special-needs housing project sponsor changes service providers, the Agency shall be notified as early as possible and a new Memorandum of Understanding must be submitted to the Agency for approval and recordkeeping.

VII. Service Fees

- A. For projects targeting very-low- or low-income tenants, services included in the Social Services Plan must be provided at no out-of-pocket cost to tenants/residents. ☐
- B. This does not restrict third-party reimbursement, such as Medicaid. ☐

Note: Social service coordinator, case manager, and linkages coordinator/provider are not counted as separate and distinct services. NJHMFA shall view these services as all being part of the same service.