

Service Amenities

California Tax Credit Allocation
Committee (TCAC)

Overview

- Regulations
- Application Components
 - Evidence of services to be provided
 - Services sources and uses budget
 - Position Descriptions
 - Service provider experience chart
 - Evidence of space for services
- Q&A

Service Amenities Regulations

Section 10325(c)(5)(B)

Objective: Reward projects that provide high-quality services designed to improve quality of life for tenants.

Space Requirements

- Space for service amenities must be available when development is placed in service.
- Space must be located inside the project and provide sufficient square footage, accessibility and privacy to accommodate the proposed services. (New)

Timing

- Amenities must be available within 6 months of project's placed in service date
- Services must be committed for a period of 10 years.

Accessibility

Services must be:

- Regular and ongoing
- Provided to tenants free of charge
- Provided on-site
- May provide off-site services if located $\frac{1}{2}$ mile from the development, with written agreement

Service Provider Experience

- Organizations providing services for which the project is claiming points must have 24 months of experience providing services to one of the target populations to be served by the project (NEW)
- Experience of individuals may not substitute for experience of organizations (NEW)

Points

Maximum of 10 points:

1. Service Coordinator: Minimum ratio of 1 FTE to 600 bedrooms (5 points)
2. Case Manager: Minimum staffing ratio of 1 FTE to 100 bedrooms (5 points)
3. Other Services Specialist: Minimum ratio of 1 FTE to 600 bedrooms (5 points)

Each position has specific required responsibilities, but not limited to those listed.

Calculating Staffing Ratios

Service Coordinator and Services Specialist (#1 and #3)

- 1.0 FTE = 2080 hours per year (52 wks x 40 hrs/wk)
- 600 bedrooms = 1 FTE = 2080 hrs/yr
- 1 bedroom = $1/600$ FTE (0.0017) = 3.47 hrs/yr
- No. of bedrooms in project x 0.0017 = Required FTE
- FTE x 2080 hours = No. of hours per year

Service Coordinator Staffing Ratios: Examples

Project with 450 bedrooms

- $450 \times 0.0017 = 0.76 \text{ FTE} = 1,581 \text{ hrs/yr}$

Project with 320 bedrooms

- $320 \times 0.0017 = 0.54 \text{ FTE} = 1,123 \text{ hrs/yr}$

Project with 130 bedrooms

- $130 \times 0.0017 = 0.22 \text{ FTE} = 458 \text{ hrs/yr}$

Calculating Staffing Ratios (cont)

Case Manager (#2)

- 100 bedrooms = 1 FTE = 2080 hrs/yr
- 1 bedroom = $1/100$ FTE (0.01) = 20.8 hrs/yr
- No. of bedrooms in project x 0.01 = Required FTE
- FTE x 2080 hours = No. of hours per year

Points (Continued)

4. Adult Educational Classes: 60 hours per year (30 for 20 units or less) – 5 points
 5. Health and Wellness or Skill-Building Classes: 60 hours per year (30 for 20 units or less) – 5 points
- May receive 10 points for providing 120 hours of #4 or #5.
 - This does not apply to any of the other categories of points

Points (Continued)

6. Health Services provided by licensed organization or individual – 5 points
7. Behavioral Health Services provide by licensed organization or individual – 5 points
8. Licensed Child Care: 20 hours per week, M-F. – 5 points
9. After school program: 10 hours per week, M-F, during school year – 5 points

Items 8 and 9 only for large family projects or projects with 50% family units

Points (Continued)

All categories are mutually exclusive. One proposed service may not receive points under two different categories.

Application Components

1. Evidence of services to be provided
2. Services sources and uses budget
3. Position descriptions
4. Service provider experience chart
5. Evidence of space for services

Evidence of Services to Be Provided

Provide evidence for each category for which you are claiming points. Evidence may be:

- Commitment letter on agency letterhead
- Memorandum of Understanding (MOU)
- Contract for services

Evidence of Services to Be Provided

Documentation must:

- State name and address of organization that will provide the services
- Describe services (including FTE or no. of hours if applicable)
- State annual dollar value of services
- Commit services will be provided for 10 years
- Commit services will be free of charge
- Name project to which services are being committed

Services Sources and Uses Budget

- Complete one column for each funding source
- Provide information for first year of services (not the entire 10 years)
- Indicate FTE/hours if applicable (# 1-5, 8-9)
- Include both cash and in-kind commitments
- Information on this budget should be consistent with the evidence of services to be provided (letters, MOUs, contracts)

Services Sources and Uses Budget EXAMPLES

Position Descriptions

- Must be provided if claiming points for items #1, 2, or 3
- Must include required responsibilities
- May include other responsibilities
- Position title may be different than language in #1, 2 or 3 as long as required responsibilities are included
- Services provided by on-site Property Manager or other property management staff are not eligible for points in any category

Service Provider Experience Chart

- Complete one row for each service provider that will be providing services for which you are claiming points
- Provide information on the providers PAST experience, sufficient to document they have 24 months experience providing services to one of the target populations in the project

Evidence of Physical Space for Services

Evidence must document that services space is:

- Located inside the project
- Provides sufficient square footage, accessibility and privacy to accommodate proposed services