RELOCATION PLAN TEMPLATE

The Relocation Plan must be:

1. Thorough and clear;
2. Detail the entire projected relocation process;
3. Consistent with requirements outlined in all sections of this manual; and
4. Follow this Template.

TEMPLATE

1. Table of Contents: Must include page numbers
2. Executive Summary: Summarize each of the following sections
3. Funding sources and applicable regulations:
    a. Activity summary
        i. Demolition/reconstruction, rehabilitation, new construction
        ii. Changes from current to proposed unit mix (bedroom size, AMI designation, unit count)
    b. Development and operating funding sources that trigger regulations
        i. Federal funding
        ii. Resyndication
    c. Applicable regulations
        i. If resyndication include
            a. Original application number
            b. If LURC or LURA affordability period over, provide expiration date
            c. If there is a LURC or LURA provide table with applicable rent and income restrictions in current terms
    d. Relevant dates (actual or projected)
        i. Federal funding application submission, if applicable
        ii. LIHTC Pre-Application
        iii. Tenant Income Certification
        iv. LIHTC Application
        v. Site control
            a. Option to purchase or ground lease
            b. Purchase or ground lease, if applicable
        vi. Initiation of Negotiation (see definition)
        vii. Relocation move-out and return
4. Expected Resident Impact:
    a. Number of tenants to be temporarily relocated
    b. For tenants to be permanently displaced (with waiver)
        i. Number of tenants
        ii. Name of Heads of Households
        iii. Which Category and Specifics apply from the *Eligibility for Assistance and Return Matrix*
    c. At 60-Day Commencement update:
        i. Changes to property rules and regulations, if applicable
        ii. Changes to property management, if applicable

5. <u>Timeline</u>: Provide dates for each of the following (differentiate between actual and projected):
    a. The dates from (3)(iv) of this Template
    b. Notices (*see Notice Requirements*)
        i. Which notices will be used
        ii. Distribution date
        iii. Method of notice distribution
    c. Other resident communication:
        i. Interviews
        ii. Surveys
        iii. Meetings
    d. Relocation and Construction duration
        i. For phasing and on-site, create list, table, or infographic that includes
            a. Unit numbers
            b. Household size
            c. Unit size
            d. Dates for each phase
            e. Natural attrition rate
        ii. Projected construction schedule
6. <u>Moving Assistance</u>
    a. Relocation moving assistance
    b. Cost estimates and sources
7. <u>Housing Assistance</u>
    a. Off-site Temporary Housing and Comparable Replacement Dwelling:
        i. Table with the following (must align with the Application's Market Study):
            a. Housing option names and addresses (projection at Application, actual at Commencement submissions):
                1. Permanent displacement: The number of comparable replacement dwellings in the area that fulfill the needs of each displaced household
                2. Temporary Relocation: A minimum of three locations
                3. Households with accessibility needs
            b. Current number of vacancies for each site
            c. Bedroom sizes for each site
            d. Rent, utility cost, and total
        ii. Hotel:
            a. Vacancy
            b. Amenity description (kitchen, suite with door to separate living room, etc.)
            c. Why apartments are not used
        iii. Map(s) showing Displacement, Comparable Replacement, and Temporary dwellings
    b. In-place rehabilitation (with waiver):
        i. In-unit and relevant construction activities
        ii. The projected impact on tenants
        iii. Methods for minimizing impact (such as hotel units or comm for day use)
        iv. If construction plans have changed since waiver, describe how.

c. Applicant efforts and methods:
    i. How the impact of the relocation process will be minimized
    ii. Methods used to prevent displacement, if applicable
    iii. **RAD:** Plans to accommodate households that may be precluded from returning due to proposed unit mix or LIHTC eligibility. Core Application must reflect such circumstances.

8. <u>Other</u>
    a. Describe approved applicable waivers
    b. If other relevant information is missing, describe here
9. <u>Uncertainties and contingency plans</u>
    a. Describe budget allotment for contingencies (*see General Policies*)
    b. Identify any uncertainties and describe plan for what will be done in those cases