

# **Illinois' 2017 Annual Comprehensive Housing Plan**

Plan Effective:

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Submitted To:

Bruce Rauner, Governor

And

The Illinois General Assembly

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## Housing Planning Activities in Illinois

This **Annual Comprehensive Housing Plan** is submitted in compliance with the Comprehensive Housing Planning Act (as amended P.A. 99-0564). Originally passed into law in 2006, the act was renewed and extended to 2026 through legislation signed into law by Governor Rauner in 2016. This statute establishes a statewide comprehensive housing initiative by identifying eight underserved **Priority Populations** and calls for the appointment of a **Housing Task Force** to improve the planning and coordination of State-administered housing resources. The Executive Director of the Illinois Housing Development Authority (IHDA) acts as Chair of the Housing Task Force and is joined by a panel of forty-four representatives, including housing experts appointed by the Governor and various state agencies.

The Housing Task Force recommends general direction to staff and occasionally proposes to establish Working Groups as needed to investigate specific housing needs and topical areas of concern. The recommendations reported by these Working Groups are intended to promote State and local actions and are incorporated into the **Technical Plan**, which is illustrated by Focus Area. To help clarify their intended purpose, each action item identified in each focus area is categorized under a broader strategy and associated with one of the **Housing Principles**. The Housing Task Force originally developed the Housing Principles to generally reflect: affordable housing produced (**Creation and Preservation**); services provided to the Priority Populations (**Affordability and Choice**); and promotion of long-term affordable housing goals (**Leadership**). Recommended efforts or program developments related to the Technical Plan are discussed near the beginning of the Annual Comprehensive Housing Plan and in its Annual Progress Reports. The discussion topics are grouped into Focus Areas in order to provide context and background information not readily found within the Technical Plan. An additional function of the plan is to catalog funding activity administered by the State for affordable housing construction, rehabilitation, preservation, subsidized home mortgages, operating or rental housing subsidies, and support services. This information can be found in the **Housing Production Plan** and the **Residential Services Plan**.

### Housing Task Force Vision Statement

To promote quality housing affordable to each household, with accessible and appropriate services where needed that supports individual and family success. Housing is an essential asset and economic engine for neighborhoods and is integral to the creation of robust communities for the citizens of Illinois.

### Illinois' Eight Priority Populations

1. Low-income households (with particular emphasis on households earning below 30% of area median income)
2. Low-income seniors
3. Low-income persons with disabilities
4. Homeless persons and persons at-risk of homelessness
5. Low- and moderate- income persons unable to afford housing near work or transportation (Live Near Work)
6. Low-income persons residing in existing affordable housing that is in danger of being lost or becoming unaffordable (Preservation)
7. Low-income people residing in communities with ongoing community revitalization efforts
8. Other special needs populations, including people with criminal records and veterans experiencing or at risk of homelessness.

## **Introduction to 2017 Focus Areas**

Each year the Housing Task Force identifies and recommends **action items** and **strategies** from the Technical Plan that it feels are likely to be implemented or will continue to develop in the coming year. When a new issue or activity arises, the Housing Task Force generally develops new action items and strategies to add to the Technical Plan. The active components of the Technical Plan are then grouped together and form the foundation of the annual Focus Areas. As a result, the Focus Areas represent topical trends in affordable housing policy and planning. The action items selected for each of the Focus Areas are taken from all three of the Housing Principles, reflecting the comprehensive approach to statewide challenges. Many action items are active for multiple years while the agencies and partners responsible pursue implementation, or decide on feasibility.

The most prevalent affordable housing challenges facing Illinois in 2017 are the local recovery from the foreclosure crisis/community revitalization, development cost reduction, and supportive housing. As these are ongoing issues, the Housing Task Force has concentrated many of its efforts on those areas in the past several years. At this time, many of the efforts continue to show dividends and the 2017 Annual Comprehensive Housing Plan seeks to highlight how the strongest responses are being bolstered and that the additional gaps are being filled. The State's role as administrator, facilitator, and innovator will continue as the most efficient solutions are fostered. With this in mind, the Housing Task Force selected the following recommended Focus Areas for the 2017 Annual Comprehensive Housing Plan:

### **Revitalizing Communities**

Utilize current funding and explore new programs and initiatives to assist communities in developing a balance of affordable homeownership and rental opportunities, and expand innovative methods for sustainable reuse of foreclosed properties.

### **Supportive Housing**

Assist special needs populations and those transitioning into (or remaining in) community-based living settings with services that support their needs, including long-term care services and supports.

### **Innovative Use of Resources and Strategies**

Identify innovative techniques in accessible design for populations who require accessible features. Expand housing production for priority populations utilizing resources that contain or reduce costs of acquisition, development, and operations. Conduct research on energy efficiency cost savings and innovative strategies to promote the use of sustainability design techniques in affordable housing development.

### **Leadership and Capacity Building**

Enhance collaborative planning efforts to foster productive housing policy changes.

## Focus Area #1: Revitalizing Communities

From reducing the continued rippling impact of the foreclosure crisis to establishing connections to jobs, education, and healthcare in areas where there previously was none, community revitalization can take on a variety of forms. While many efforts have been engaged (and will continue to be engaged) to address rebuilding what was lost, the Housing Task Force is proactively developing policies that impact the future of Illinois communities, bringing opportunity to new places throughout the State. Furthermore, the recently amended Comprehensive Housing Planning Act has identified low-income people residing in areas of ongoing community revitalizations as a priority population, and the items included in this focus area seek to address their housing needs.

The **Revitalizing Communities Focus Area** draws from actions and strategies that are identified in this report's **Technical Plan** which lays out the long-term planning goals of the Housing Task Force. In this Focus Area, two Technical Plan strategies provide the framework for current programs, and recommended efforts going forward. These strategies, and their accompanying action items are listed on the following page.

## Recommended Technical Plan Strategies and Action Items

Strategies	Action Items	Partners	Principle(s)*
Create and assist community support network for the State.	Seek funding and operate home repair and homebuyer assistance programs as a method of maintaining affordability, preventing foreclosure and preserving single-family housing stock.	IHDA, DCEO, HUD USDA-RD, municipalities, counties, non-profits	CP
	Continue to seek funding and maintain a variety of counseling services; primarily foreclosure prevention and homebuyer counseling.	IHDA, housing counseling agencies, ILGA, NeighborWorks, HUD	CP
Assist communities to develop a balance of affordable homeownership and rental opportunities.	Continue to support responsible and affordable homeownership programs for low to moderate-income households.	IHDA, USDA, counseling agencies	AC
	Continue implementation of homeownership programs and pursue other funding opportunities for down payment assistance.	IHDA, DCEO, HUD, FHLB, municipalities and counties	CP
	Build and improve upon existing Community Revitalization Effort incentives in the QAP.	IHDA	CP
	Provide technical assistance via a Community Revitalization network or other methods to communities looking to provide robust community-level planning.	IHDA	L
* Creation and Preservation (CP), Affordability and Choice (AC), Leadership (L)			

## Housing Counseling Resources and Analyses

### Hardest Hit Fund

The U.S. Department of Treasury established the Hardest Hit Fund (HHF) in late 2010, allocating temporary emergency mortgage assistance through State Housing Finance Agencies (HFAs) to families and persons experiencing unemployment or underemployment. Financed through the Troubled Asset Relief Program (TARP), the Illinois Housing Development Authority (IHDA), the administrator of HHF for Illinois, was awarded approximately \$445.6 million that year. Following this initial award, IHDA received a second allocation in 2016 for \$269.4 million to relaunch and expand the the HHF Program. Over the course of the program, IHDA has established five sub-programs with these funds: the Homeowner Emergency Loan Program (HHF HELP), I-Refi (formerly the Home Preservation Program or HPP), the Mortgage Resolution Fund (MRF), the Down Payment Assistance Program (1<sup>st</sup> Home Illinois), and the Blight Reduction Program (BRP).

IHDA has effectively assisted over 17,798 households through these programs.

#### Homeowner Emergency Loan Program (HELP)

HELP provides temporary mortgage payment assistance to low and moderate-income families who experienced a 15 percent income reduction due to a hardship. The assistance comes in two ways: monthly mortgage payment assistance and reinstatement assistance. The initial HELP program ceased accepting new applications in October 2013, as there were sufficient numbers of approved applications on hand to fully allocate program funds and meet loan targets of 13,000.

With the second award from the U.S. Department of Treasury in 2016, the HELP program was expanded and relaunched on August 1, 2016. The program will assist homeowners who have experienced an income reduction due to qualifying hardships such as; unemployment, substantial underemployment, temporary disability, death and divorce. Eligible homeowners receive up to \$35,000 in assistance for reinstatement and/or for mortgage payments up to 12 months. The relaunch of the program has already seen over 5,200 applications and funded 36 applicants.

#### Mortgage Resolution Fund (MRF)

Distressed home mortgages are bought on the private market and evaluated for long-term affordability by a coalition of non-profit organizations (National Community Stabilization Trust, Housing Partnership Network, Enterprise Community Partners, and Mercy Housing). Eligible mortgagees were then offered permanent loan modifications that incorporate principal forgiveness to bring the mortgage in line with the appraised market value. Mortgagees who did not meet minimum criteria received Housing Counseling to discuss exit options including short sale and deed-in-lieu. MRF concluded purchasing loan pools in October 2013 and is expected to be phased out in early 2017. To date, MRF had approved 107 loans.

#### I-Refi (Formerly Home Preservation Program or HPP)

Introduced in 2012, HPP leveraged up to \$50,000 of HHF dollars per participant to facilitate a permanent solution to troubled homeowners through a refinance, recast, or permanent modification of their first mortgage. The HPP program assisted homeowners who were ineligible for other assistance programs and were financially unable to make their mortgage payments due to a qualifying hardship. To date, HPP has assisted 528 households.

With the second award from the Treasury in 2016, HPP was expanded and relaunched as I-Refi in August 2016. For more information on I-Refi, please see program details under Homebuyers programs on page 14.

#### Blight Reduction Program (BRP)

Introduced in 2014, BRP aims to decrease preventable foreclosures and to stabilize neighborhoods in communities across Illinois. The program provides funding to units of local government and a not-for-profit partner to complete demolition, greening, and eventual reuse, repurpose and/or redevelopment (“Revitalization”) of blighted, vacant, residential properties in targeted communities. Partners apply for the program with specific properties and are reimbursed up to \$35,000 for each property. To date, BRP reimbursed



participants over \$1.3 million for 47 properties, with 358 properties in process. The program is expected to fund at least 455 demolitions. For information regarding the BRP, please see page 12 under the Reuse and Revitalization programs.

**1stHomellinois - Down Payment Assistance (DPA) Program**

1stHomellinois complies with the U.S. Treasury initiative by utilizing using HHF dollars to provide first-time homebuyers in ten targeted counties with \$7,500 in down payment assistance. The assistance is in the form of a 5-year, forgivable 2nd mortgage, and is given in conjunction with an IHDA 1<sup>st</sup> mortgage loan product. The assistance incentivizes home buying in distressed areas which helps to stabilize housing markets and prevent future foreclosures. To date, DPA has assisted 3,743 households totaling \$31.5 million in disbursed funds.

**National Foreclosure Mitigation Counseling Program**

The federally-funded National Foreclosure Mitigation Counseling (NFMC) Program is administered at the federal level by NeighborWorks America through funds annually appropriated by Congress. NeighborWorks America provides funds annually to housing finance agencies (such as IHDA) HUD-approved intermediaries and other counseling agencies to provide foreclosure mitigation counseling to homeowners at risk of foreclosure. As of April 2016, NFMC has assisted over 2 million homeowners across the country.

IHDA is currently in Round 10 of NFMC with an allocation of \$409,766. This funding amount is expected to assist approximately 1,459 at-risk homeowners through the end of its grant term, June 2017. In November 2016, IHDA submitted an application for NFMC Round 10 Supplemental Funding. The request amount totaled \$488,252 with an estimated 1,898 of assisted homeowners. NeighborWorks will announce funding awards during the first quarter of 2017. The following chart summarizes NFMC foreclosure mitigation counseling assistance Rounds 1 through 10. Since inception of the program, IHDA has received over \$17 million which enabled IHDA to assist approximately 45,000 homeowners.

<b>National Foreclosure Mitigation Counseling Program (NFMC) Previous Funding Rounds</b>				
<b>Funding Round</b>	<b>Time Period</b>	<b>Money Awarded</b>	<b>Number of Agencies</b>	<b>Homeowners Served</b>
<b>Round 1</b>	June 2008 - April 2009	\$1.57M	15	3,829
<b>Round 2</b>	June 2009 - February 2010	\$3.09M	26	6,190
<b>Round 3</b>	March 2010 - November 2010	\$1.39M	39	3,300
<b>Round 4</b>	December 2010 - June 2011	\$1.45M	40	3,912
<b>Round 5</b>	September 2011 - March 2012	\$2.27M	35	6,065
<b>Round 6</b>	September 2012 - January 2013	\$1.73M	30	4,406
<b>Round 7</b>	August 2013 - June 2014	\$2.68M	30	6,775
<b>Round 8</b>	August 2014 - June 2015	\$1.97M	27	4,740
<b>Round 9</b>	August 2015 - June 2016	\$1.21M	27	4,134
<b>Round 10</b>	July 2016 - June 2016 (estimated)	\$409,766	23	1,459 (estimated, round in progress)

**Foreclosure Prevention Program**

The Illinois Foreclosure Prevention Program (FPP), established by the Illinois General Assembly, is a statewide program connecting families facing foreclosure with the resources they need to help them keep their homes. FPP is funded via a \$50 foreclosure filing fee paid by plaintiffs to the respective County Clerk. During Rounds 1-3, \$10.3 million was awarded among the City of Chicago and 49 agencies across the state. To date, 108,817 clients have been served by the program.

For Round 4, IHDA will be allocating \$4.5 million to administer the program across the state. Recommended participants are expected to be presented to the IHDA Board on December 16, 2016 for approval. Staff is proposing to provide funding to 40 housing counseling agencies and community based organizations in accordance with the below statutorily required distribution:

- 25% to counseling agencies outside the City of Chicago,
- 25% to community-based organizations outside the City of Chicago,
- 25% to community-based organizations in Chicago, and
- 25% to the City of Chicago for counseling agencies in Chicago or for foreclosure prevention counseling administered by the City.

### **Foreclosure Prevention Program – Graduated (FPPG)**

Established by the Illinois General Assembly, FPPG enables IHDA to make grants to HUD approved housing counseling agencies for all activities required to successfully manage a program that includes training and counseling for pre/post purchase, rental, foreclosure mitigation, and credit counseling. Funding for this program is derived through foreclosure filing fees and an allocation of \$6 million was appropriated to IHDA in the 2016 Omnibus (P.A. 99-0524) to continue the administration of the program. IHDA expects to hold an application funding round by the 2<sup>nd</sup> quarter of 2017.

### **Cook County Foreclosure Mediation Program**

The Cook County Mortgage Foreclosure Mediation Program (CCMFMP) was established in April 2010 in response to the economic recession and related mortgage crisis as an effort to assist Cook County families in foreclosure. The program was designed to provide struggling homeowners critical support and to help them explore their options to either stay in their homes or negotiate a respectable exit as early as possible once the foreclosure process begins. The program has four parts: outreach, a hotline, housing counseling agencies, and court mediation. IHDA oversees the hotline and housing counseling agencies. Of completed cases, 7 out of 10 reach an agreement with the lender and 5 out of 10 stay in the home. Since inception, over 26,000 homeowners have received services under this program.

In November 2016, the IHDA Board approved an amendment to the Intergovernmental Agreement with Cook County which will extend the program through May 31, 2017. IHDA is currently running Round 5.1 of CCMFMP.

## Reuse and Revitalization

### Abandoned Properties Program

The Illinois Housing Development Authority's Abandoned Properties Program (APP), was created in 2010 by the Illinois General Assembly. Funded through foreclosure filing fees under the Abandoned Residential Property Municipality Relief Fund (ARPMR), the APP program provides grants to municipalities and counties to secure, maintain, demolish, or rehabilitate abandoned residential properties within their jurisdictions. A maximum grant award of \$75,000 per applicant can be awarded to municipalities and counties based on established ranking criteria. A waiver to request up to \$250,000 may be considered if certain qualifications are met. By statute, allocations will be distributed as follows:

- 25% to the City of Chicago,
- 30% to Cook County and municipalities in Cook County other than the City of Chicago,
- 30% to the Collar Counties (DuPage, Kane, Lake, McHenry, and Will) and municipalities within those counties, and
- 15% to other areas of the State.

Under Round 1, 52 Grantees were awarded \$7,213,636, assisting a total of 2,484 properties were assisted. An estimated \$15 million will be available for Round 2 of APP. An application funding round was held in mid-September 2016 and 89 applications were received from municipalities and counties across the state. IHDA expects to take funding recommendations to the Board in February 2017.

### Blight Reduction Program

IHDA established the Blight Reduction Program ("BRP") in August 2014 using funds allocated through the U.S. Treasury' Hardest Hit Fund program. IHDA utilizes the BRP fund to decrease preventable foreclosures and stabilize neighborhoods by supporting Illinois units of local government and their non-profit partners as they target blighted, vacant, residential properties for residential real property acquisition, demolition, greening, and eventual reuse or redevelopment. BRP complements the state-funded Abandoned Property Program by reducing blight for the end purpose of land reuse, repurposing, and/or redevelopment that benefits the surrounding residential community and helps reduce foreclosures.

The Authority is currently administering Round 1 and 2 of BRP. For Round 1, 15 local governments and their non-profit partners received awards totaling \$5.39 million. Round 2 awards totaled \$10.5 million among 15 participants in areas of greatest need throughout Illinois.

### Land Banking

A number of Illinois Housing Task Force members have been involved in the creation and initial planning for two land banks in the Chicago metropolitan area: the Cook County Land Bank Authority, and the South Suburban Land Bank and Development Authority. These entities were created to acquire, maintain, and build or rehabilitate abandoned properties in communities affected by property abandonment and/or which desire to develop affordable housing. After properties are rehabilitated, they are sold with affordability deed restrictions attached, and proceeds earned are recycled to continue the process.

In July 2013, the Cook County Land Bank Authority was awarded \$6 million by the Illinois Office of the Attorney General from \$70 million National Foreclosure Settlement Program to support its community revitalization efforts in the start-up of its land bank, and support the already existing South Suburban Land Bank.

In April 2014, the Cook County Land Bank Authority received \$250,000 and municipalities in the South Suburban Land Bank Authority received an aggregate of \$550,400 from IHDA through the Abandoned Residential Properties Program. The funding was used to secure, maintain or demolish abandoned properties. Additionally, in July 2014, the Private Bank announced it would commit \$10 million in financing to the Cook County Land Bank.

In March 2015, the Cook County Land Bank Authority was awarded \$560,000 in funding in Round One of IHDA's Blight Reduction Program for land banking efforts in the Chicago neighborhoods of Englewood and Woodlawn. Additionally, both the Cook County Land Bank Authority and South Suburban Land Bank and Development Authority act as not-for-profit partners with several communities who also received Round One Blight Reduction Program funding. These communities include Chicago Heights, Joliet, Park Forest, and Riverdale.

In May 2015, the Cook County Land Bank Authority, in collaboration with the DePaul's Institute for Housing Studies, completed a study identifying thirteen focus communities in the suburbs and City of Chicago where substantial investment would provide the greatest positive impact. The Cook County Land Bank Authority plans to work under the direction of the South Suburban Land Bank and Development Authority for focus communities in Suburban Cook County. Focus municipalities and neighborhoods were chosen through the analysis of housing market traits within each area. Some of the variables used included: turnover ratios, foreclosure accumulation, and vacancies trending, among others.

Both the Cook County Land Bank Authority, and South Suburban Land Bank and Development Authority continue to partner with several municipalities to coordinate rebuilding efforts. The two land banks support municipalities in bringing vacant, abandoned, and foreclosed properties back to productive uses. The Cook County Land Bank Authority currently has acquired over 80 available properties and the South Suburban Land Bank and Development Authority has acquired over 50 available properties.

In February 2016, the Cook County Land Bank Authority and the South Suburban Land Bank and Development Authority were awarded \$2,835,000 in funding as part of Round 2 of IHDA's Blight Reduction Program. The funding should enable the agencies to purchase a proposed 81 units.

Additionally, on September 14, 2015, the Pana City Council approved the establishment of the Christian County Land Bank and Development Authority. The joint venture between the City of Pana and Christian County will acquire, rehabilitate, and sell vacant properties in Pana. The City of Pana is seeking public funding resources to implement the land bank authority's mission.

## Homebuyer Programs

### **@Homellinois**

IHDA launched @Homellinois in March 2015. The program targets first-time and repeat homebuyers. @Homellinois offers buyers \$5,000 in down payment assistance with a 30-year fixed rate mortgage. Buyers must contribute \$1,000 or 1 percent of the purchase price (whichever is greater). @Homellinois has the added benefit of a Mortgage Credit Certificate (MCC) which may help reduce tax liability for the homebuyer. IHDA projects committing \$220 million in DPA through @Homellinois to assist approximately 2100 households in CY 2017, with \$25 million, or approximately 200 of the aforementioned 2100 households, in MCC's.

### **1<sup>st</sup> Homellinois**

IHDA launched the 1<sup>st</sup>Homellinois loan program in August 2015. 1<sup>st</sup>Homellinois targets homeownership assistance in 10 Illinois counties hit hard by the foreclosure crisis. The program provides \$7,500 in down payment assistance with an interest rate (currently) as low as 4.0 percent for a secure, 30-year fixed rate mortgage.

1<sup>st</sup>Homellinois is funded through the U.S. Department of Treasury's Hardest Hit Fund (HHF). The U.S. Treasury approved IHDA to utilize \$75 million of its HHF resources to assist qualified homebuyers in the following ten targeted counties: Boone, Cook, DeKalb, Fulton, Kane, Marion, McHenry, St. Clair, Will, and Winnebago. IHDA targeted these counties as they are above the state average in distressed housing market indicators such as delinquency rates, negative equity and foreclosure rates. IHDA projects committing \$600 million to provide DPA to approximately 4600 households in CY 2017.

### **I-Refi**

IHDA launched the I-Refi program in August 2016. The program is designed to help homeowners who have been current on their mortgage payments for at least twelve months and are at least 110% underwater on their current mortgage. As of November 30, 2016, I-Refi offers up to \$50,000 in federal assistance, funded through the U.S. Department of Treasury's Hardest Hit Fund (HHF), to buy down a mortgage and refinance into an affordable 30-year fixed rate mortgage. Borrowers who have previously utilized Hardest Hit Funds may be eligible for an additional \$35,000 for a total of \$85,000. IHDA projects committing \$130 million to assist approximately 1,100 households in CY 2017.

### **USDA Rural Development 502 Loan Program**

USDA Rural Development Section 502 direct loans are primarily used to help low-income individuals or households purchase homes in rural areas. Funds can be used to build, repair, renovate or relocate a home, or to purchase and prepare sites, including providing water and sewage service connections. Borrowers generally must meet low to moderate-income eligibility requirements.

USDA Rural Development also offers Section 502 loan guarantees through local participating lenders, which have been used very successfully in conjunction with IHDA's aforementioned loan products. Applicants for loans may have an income of up to 115% of the median income for the area. Families must be without adequate housing, but be able to afford the mortgage payments, including taxes and insurance, with reliable credit histories.

In 2017, the USDA Rural Development estimates committing \$19 million towards its rural homeownership direct loans, which will provide approximately 290 direct loans to very low- and low-income rural families. The USDA Rural Development estimates committing \$310 million towards guaranteed rural housing loans which will assist approximately 3,800 low- and moderate-income rural families. The latter program has worked very successfully with IHDA's Home Ownership programs.

## **Habitat for Humanity - Community Impact Fund**

In June 2016, the Illinois Housing Development Authority (IHDA) renewed its partnership with Habitat for Humanity of Illinois (HFH) to facilitate homeownership opportunities for low- and very low-income families throughout the state. HFH sub-grants IHDA funding through an application to its statewide affiliates.

Funded through the Illinois Affordable Housing Trust Fund, the Program provides forgivable loans to low income households for the purposes of home acquisition, construction and or rehabilitation. Households at or below 80% AMI are eligible to receive \$15,000 and households at or below 50% AMI are eligible to receive \$20,000. Assistance is provided as a 5-year forgivable loan. The program is available statewide through local Habitat for Humanity affiliates coordinated through the Habitat State Association. The 2017 allocation is projected to assist 50 families.

## **Home Repair Programs**

### **Single Family Rehabilitation Program**

Funded by the Illinois Affordable Housing Trust Fund, the Single Family Rehabilitation (SFR) program provides grants to units of local government and community based organizations to help low-income homeowners afford costly home repair expenses. SFR was modeled after the Authority's previous HOME funded Single Family Owner-Occupied Rehabilitation (SFOOR) program. IHDA no longer administers this program.

An allocation of \$6 million is available in FY2017 to units of local government and community based organizations in the HOME Illinois Participating Jurisdiction. This disqualifies other HOME Participating Jurisdictions including: Chicago, Decatur, East St. Louis, Evanston, Joliet, Peoria, Springfield, Rockford, and Urbana. The following counties are also ineligible to apply: Madison, McHenry, Will, Cook, DuPage, and Lake.

IHDA held an application funding round in October 2016 and a total of 28 applications were received for a combined request of \$14.7 million. Recommended participants are expected to be presented for approval to the IHDA Board in February 2017.

The maximum loan amount of \$45,000 will be provided to income-eligible, owner-occupied homeowners to assist in making necessary home repairs, which include addressing health and safety issues on the property. SFR assistance to homeowners is provided in the form of a 5-year forgivable loan.

### **Community Development Block Grant Housing Rehabilitation Program**

Administered by Department of Commerce and Economic Opportunity (DCEO), the Community Development Block Grant Housing Rehabilitation Program (formerly known as the Community Development Assistance Program - CDAP) assists eligible local governments in financially assisting income-eligible homeowners (for non-entitlement areas of the state) in making necessary repairs and improvements to their homes in order to eliminate health and safety problems, correct building code violations, and to preserve the long-term integrity of the units. Housing rehabilitation work is completed by local contractors who have been selected by competitive bid and who meet all insurance requirements. DCEO projects committing \$6.75 million to the program in 2017.

## Rental Housing Development and Rental Assistance

IHDA operates a number of rental housing programs which promote new construction and preservation.

### Low Income Housing Tax Credit (LIHTC) Program

The LIHTC Program is a federal tax credit used to finance the development or redevelopment of affordable rental housing for low-income households (at 60 percent area median income or below). The Internal Revenue Service allocates federal tax credits to State HFAs which then award the credits to eligible affordable housing developments who use the equity generated from the sale of the tax credits to lower the debt burden. Units must maintain affordable rents for at least 30 years.

There are two types of low income housing tax credits: 9 percent tax credits, and 4 percent tax credits. Nine percent tax credits (known as the competitive tax credit) are allocated to the State based on an IRS formula and can subsidize up to 70 percent of the eligible development costs for new construction and substantial rehabilitation of housing projects that are not otherwise subsidized by the federal government. Four percent tax credits are generated through issuance of tax-exempt private activity bonds and can be used for acquisitions/rehabilitation projects and when 50 percent or more of a projects eligible cost are financed with tax-exempt private activity bonds.

The 2016-2017 Qualified Allocation Plan (QAP), which explains how the State plans to distribute its Low Income Housing Tax Credits was finalized and submitted to the Governor in October 2015 for approval. Applications for both 9 percent and 4 percent tax credits must meet the mandatory requirements of the QAP. Applications for 9 percent tax credits are subject to a competitive process and receive points based on the scoring section of the QAP.

The 2016-2017 QAP includes a Community Revitalization Effort scoring criteria which aims at preserving existing affordable housing in distressed community areas where there is an active redevelopment effort ongoing, allowing for the greatest amount of choice for low-income households to access quality housing. The Community Revitalization Effort is intended to incentivize local planning efforts which are likely to lead to access to employment, healthcare & supportive services, community amenities such as parks and retail locations, transportation and the improvement of quality housing stock. Nine percent tax credits applications can earn up to ten points for establishing Community Revitalization Efforts.

The 2016-2017 QAP also includes a new Affordability Risk Index tool. The Affordability Risk Index tool provides a point-based incentive in the QAP for developers to preserve affordability in areas that are gentrifying and becoming less affordable at a faster rate. The Affordability Risk Index tool is a Census Tract-based tool. Census Tracts where affordability loss risk is greatest receive the highest points in this index. Nine percent tax credits applications meeting the Affordability Risk Index can earn up to five points.

Both 4 percent- and 9 percent tax credit applications must first be approved through a Preliminary Project Assessment (PPA) which provides basic information such as project concept and design, location and proposed tenant population. In 2017, \$211,500,000 is anticipated for 9% LIHTC and \$58,725,000 for 4% LIHTC (these figures represent ten years of credits times the amount). Below are 2017 LIHTC Program application deadlines.

<b>2017 LIHTC Program Application Deadlines</b>	
<b>9% LIHTC Program Timeline</b>	
PPA (Round I - 2017)	11/7/2016
PPA (Round II - 2017)	3/3/2017
LIHTC Application (Round I - 2017)	6/23/2017
<b>4% LIHTC Program Timeline</b>	
PPA	90 days prior to 4% determination request
4% Tax Credit Application	Accepted any time

### **HOME/Affordable Housing Trust Fund (AHTF)**

Funding for the HOME Program at the federal level has been cut drastically, reducing the funds IHDA receives on an annual basis by over 40%. Despite the reduction in available funding, IHDA has continued to receive a significant number of requests for HOME financing and currently has a sizeable pipeline of multifamily projects. As such, IHDA has established a \$1 million maximum request for proposed projects in Chicago, Chicago Metro and Other Metro areas and a \$2 million maximum request for proposed projects in Affordable Housing Planning and Appeal Act (AHPAA) communities and non-Metro areas. On December 18, 2015 the U.S. House and Senate passed the FY2016 Omnibus Spending Bill. The FY2016 Omnibus Spending Bill funds all 12 appropriations bill, including the Transportation, Housing and Urban Development and Related Agencies (THUD) bill. HOME received a small increase of \$50 million above the FY2015 level to \$950 million for FY2016. Our 2017 HOME allocation is \$11,652,817.

IHDA was designated a Participating Jurisdiction by Governor Rauner in 2016. Previously, HOME funds could only be drawn through an appropriation from the Illinois General Assembly; however, IHDA now has the ability to draw down the funds.

Additionally, demand for Affordable Housing Trust Fund (AHTF) financing also regularly exceeds its availability in Illinois. Multi-family projects proposing to use Trust Fund dollars will be prioritized on those projects receiving funding from other sources, as well as those projects which are ready to proceed.

Per the HOME federal authorizing statute, 15 percent of each grantee's annual allocation must be obligated/expended on Community Housing Development Organizations (CHDOs), a specific type of non-profit entity defined by HUD rules. CHDO funds can only be used to fund single-family acquisition/rehab/resale programs and rental housing development. IHDA plans to continue to concentrate CHDO funding on the latter types of projects.

### **Affordable Advantage Mortgage**

Affordable Advantage provides permanent first mortgage financing up to \$10 million for new construction, refinance or acquisition/minimal rehabilitation. The projected volume for this program in 2017 is \$10 million. Loans over \$3 million will include FHA Risk Share. IHDA will determine whether or not FHA Risk Share will be required on loans under \$3 million.

### **Credit Advantage Mortgage**

Credit Advantage provides construction and permanent mortgage loan financing for Low Income Housing Tax Credit (LIHTC) projects awarded by IHDA or the City of Chicago. The maximum loan amount is \$10 million. The projected volume for this program in 2017 is \$50 million. Loans over \$3 million will include FHA Risk Share. IHDA will determine whether or not FHA Risk Share will be required on loans under \$3 million.



## **IHDA/HUD – Risk Share Mortgage with U.S. Treasury Investment (FFB) Mortgage**

In June 2014, the U.S. Treasury announced a new partnership with the U.S. Department of Housing and Urban Development. Under this new partnership, the Federal Financing Bank (FFB) will provide financing for multifamily loans insured under FHA's Risk Sharing Program. The Risk Sharing program, pursuant to Section 542 of the Housing and Community Development Act of 1992, allows IHDA to originate affordable housing mortgage loans and share the risk with HUD via FHA mortgage insurance on the loan. The goal is to expand access to FHA mortgage insurance and manage additional risk taken on by the Federal government. For each Risk Sharing loan, HUD and IHDA split the mortgage insurance premium based on the percentage of risk that each party assumes.

These loans will support the development and preservation of affordable rental housing and will allow housing finance agencies (HFAs) like IHDA to have more access to the capital needed to maintain affordable multifamily developments. This partnership significantly lowers interest rates to support the development and preservation of affordable rental housing compared to the cost of tax-exempt bonds under current market conditions.

In July 2015, the IHDA Board authorized the Authority's participation in the Federal Financing Bank (FFB) Risk Sharing Initiative. As a result of this partnership, IHDA is able to provide capital at reduced rates otherwise unavailable in the current market. By utilizing this new loan product alongside taxable first position mortgages, IHDA expects to preserve more than 1,500 units of affordable housing through 2016. The projected volume for this program in 2017 is \$50 million.

## **National Housing Trust Fund (NHTF)**

The National Housing Trust Fund (NHTF) was authorized as part of the Housing and Economic Recovery Act of 2008 to increase and preserve rental housing for extremely low income households (30 percent area median income or less) and very low income households (50 percent area median income or less), including homeless households, as well as increase homeownership opportunities for very low- and extremely low income households. The NHTF was established as a permanent federal program with its main proposal dedicated sources of funding coming from Government Sponsored Enterprises (GSEs) Fannie Mae and Freddie Mac, which are not subject to the appropriations process. The law required that Fannie Mae and Freddie Mac transfer a portion (0.042 percent) of their new after-tax profits to the NHTF. In September 2008, Fannie Mae and Freddie Mac were taken over by the Federal Housing Finance Agency (FHFA) when they experienced financial troubles due to the foreclosure crisis. As a result, contributions to the NHTF were suspended for the time period when they were under federal receivership.

On December 11, 2014, the FHFA announced it would be terminating the NHTF contribution suspension and Fannie Mae and Freddie Mac were directed to set aside the required funds in 2015 and each year thereafter. Within 60 days after the end of the fiscal year, they are to transfer the funds. Funding allocations for the first year were announced in April of 2016.

On January 30, 2015 HUD published an Interim Rule which provided guidelines for states to implement the HTF. The NHTF statute requires states to select an agency (such as a housing finance agency or a housing department) to receive and administer NHTF resources. Each state must prepare an annual Allocation Plan describing how it will distribute NHTF resources based on the priority housing needs identified in the State's Consolidated Plan (ConPlan). HUD's Interim Rule requires that the NHTF Allocation Plan be inserted as a component of a state's ConPlan, following the ConPlan public participation requirements. In February 2015, IHDA submitted the State's/IHDA's designation letter for the NHTF. The State has submitted the State of Illinois Housing Trust Fund 2016 Final Allocation Plan to HUD for review and is pending approval.

States must use at least 80% of all funds (or 90% of program funds) for rental housing/renters. IHDA is allowed to use up to 10% of remaining program funds for homeownership assistance. IHDA will use 90% of all funds (100% of all program funds) for rental housing. There is also an allowance to use up to 10% of all funds for general administration and planning costs. IHDA will use said funds for this purpose, which also includes affirmatively furthering fair housing activities.

In years when the national funding level falls below \$1 billion, 100% of program funds must be used to benefit extremely low-income households, defined as 30% of area median income or less. That was the case with 2016

funding. Fannie Mae and Freddie Mac are expected to report after tax profits in March/April of 2017. It is estimated that the 2017 funding levels will be similar to the 2016 program year at \$4,310,055.

### Rental Housing Support (RHS) Program

The Rental Housing Support (RHS) Program was created in July 2005 to provide rental assistance by subsidizing rental housing units. It is a unit-based program targeting households who are at- or below 30 percent of the area median income. 50 percent of the resources are available for extremely low-income households who are at or below 15 percent of their area median income. IHDA administers the program overall, but contracts with Local Administering Agencies (LAAs) around the state who manage the program in their communities, including finding and screening tenants.

The Rental Housing Support Program receives its funding from a \$10 charge on real estate document recording fees collected at the county level, with one dollar of the fee retained by the county. In May 2015, the Illinois Supreme Court overturned a 2011 court ruling that found the \$10 fee collected by the counties unconstitutional. Plaintiffs filed a class action lawsuit in the Circuit Court of Lake County challenging the \$10 charge as unconstitutional, arguing it violated the Illinois Constitution’s uniformity, due process and equal protection clauses. During the lawsuit, the fee charge was still collected and submitted to the Illinois Department of Revenue (DOR). However, IHDA was unable to access funds received at DOR after September 11, 2013. With the lawsuit officially over, the hold on the funds was released; however, they cannot be officially drawn down or accessed until an appropriation is passed by the Illinois General Assembly. As part of their 2016 Omnibus Spending Bill (P.A. 99-0524), the General Assembly did appropriate RHS money to IHDA.

Once drawn, the available funds will be utilized to support the addition of new Long Term Operating Support (LTOS) Program units. The LTOS program is part of the Rental Housing Support Program intended for affordable housing developments. The goal of the LTOS program is to increase the supply of affordable housing to households earning at or less than 30 percent of area median income by providing a long-term, unit-based rent subsidy. IHDA projects committing \$9,060,651 to the RHS program in 2017. Please see *Focus Area #2: Supportive Housing*, for further details on the RHSP – Long Term Operating Support part of this program. Listed below are the local administering agencies who currently work with the RHS Program and the areas they cover.

Local Administering Agencies (LAAs)	
Agency Name	Service Area
Affordable Housing Corporation of Lake County	Lake County
CEDA	Suburban Cook County
DuPage Housing Authority	DuPage County (excluding Aurora)
Housing Authority of Henry County	Henry, Bureau, and Stark County
Housing Choice Partners	Suburban Cook County
Illinois Association of Community Action Agencies	Henry, Mercer, Rock Island, Boone, Winnebago, Adams, Brown, Pike, Schuyler, Edwards, Gallatin, Hamilton, Saline, Wabash, Wayne, White, Bond, Clinton, Marion, Washington, Clay, Effingham, Fayette, Shelby, Moultrie, Christian, Montgomery, Franklin, Williams, Jefferson, Clark, Coles, Crawford, Cumberland, Douglas, Edgar, Jasper, Lawrence, Richland, Bureau, Carroll, LaSalle, Lee, Marshall, Ogle
Kankakee County Housing Authority	Kankakee and Will County
Kendall Housing Authority (handled by DuPage Housing Authority)	Kendall, Grundy County (excluding Aurora and Joliet)
Lazarus House	Kane County
Madison County Community Development	Madison County
McHenry County Hsg Authority	McHenry County
Rock Island Housing Authority	City of Rock Island
Springfield Housing Authority	City of Springfield
St Clair County IGD	St Clair County
Winnebago County Housing Authority	Jo Daviess, Ogle, Winnebago and Boone Counties

## Housing and Economic Development

### LIHTC Community Revitalization Plans

IHDA reviews Community Revitalization Plans to explore how affordable housing can become incorporated in the overall economic development efforts in high-poverty and/or rural areas. Since 2012, when IHDA began using Preliminary Project Assessments (PPAs) as a way to pre-review site and market concerns, IHDA has been able to draw out specific data on the markets. This data allow IHDA to make informed decisions on markets at a more detailed level, rather than based on assumptions such as a perception that IHDA over invests in larger communities. IHDA uses this data to examine concentrations of poverty and affordable housing and our policy allows us to look beyond the data to determine whether IHDA investment in questionable markets can increase opportunities to improved jobs, education, services and transit access, rather than simply keep low-income residents in a low-income area. Detailed Community Revitalization Plans are an integral part of this process and help IHDA find opportunities outside of opportunity areas. As such, IHDA provides scoring incentives to developers who contribute to larger revitalization efforts in their community.

Due to the fact the 2016-2017 Qualified Allocation Plan (QAP) is the first incorporation of Community Revitalization Efforts as an in-depth scoring category, IHDA is working with partners to improve the current system for the next QAP (2018-2019). The QAP specifies how states will review, approve, and allocate federal Low Income Housing Tax Credits (LIHTCs). When scoring proposed projects the QAP provides points to projects meeting certain criteria. Proposed projects in locally adopted Revitalization Plan areas are currently eligible to receive up to two points in the 2016-2017 QAP if they address concentration of affordable housing and promote mixed-income housing and up to two points if they demonstrate a realistic strategy and implementation plan to increase access to living wage employment. Requirements are posted on the IHDA website, in addition to a list of Illinois Employment and Training Centers, Small Business Development Centers, Workforce Investment Centers, Community Colleges and similar resources to improve economic revitalization planning efforts.

Qualified Census Tracts (QCTs) are census tracts, designated by the U.S. Department of Housing and Urban Development for purposes of the Low Income Housing Tax Credit, with a poverty rate of 25% or in which 50% of the households have incomes below 60% of the area median income. QCT projects are eligible for up to a 30 percent boost in eligible basis, equaling to a significantly larger credit allocation if approved.

Developers must submit a copy of the Revitalization Plan with their proposed project application in order to score. The Revitalization Plan must be a previously published document that is not more than 10 years old, including any updates and should address realistic implementation, specific timelines and budgeting. Acceptable planning documents include, but are not limited to comprehensive plans, land bank authority plans, transit oriented development plans, inter-jurisdictional plans and other locally designated and approved plans. Additionally, the Revitalization Plan must include housing policy goals and address economic development and job creation efforts.

## **Focus Area #2: Supportive Housing**

This Focus Area aims to assist special needs populations and those transitioning into (or remaining in) community-based living settings with services that support their needs, including long-term care. This section will also include planned actions by category in 2017, as well as an update on housing and health care.

This focus area has become increasingly complex. Besides focusing on persons with disabilities, IHDA, as a housing finance agency, and other service provider agencies are frequently called upon to assist with meeting the housing needs of other special needs populations. IHDA has funded housing for special needs populations for a number of years, including the homeless, frail elderly, emancipated youth, veterans, survivors of domestic violence, ex-offenders, and persons living with HIV/AIDS. IHDA plans to continue to work jointly with other State agencies, housing and services providers and within existing committees and advisory groups to gather information on the population, housing needs and existing housing inventory available for all of these groups. In addition, the Housing Task Force has reconvened its Supportive Housing Working Group to update its report from 2008 to fully include all of these special needs populations. This Focus Area also covers the State's major efforts in Healthcare and Human Services Transformation.

## Recommended Technical Plan Strategies and Action Item

Strategies	Action Items	Partners	Principle(s)*
Identify ways to stabilize supportive housing resources, such as Medicaid, for supportive housing services, and identify savings from people moving out of institutional care or high medical needs now in supportive housing for the purpose of increasing housing production.	Review current supportive housing resources at the state and federal level and assess the current financial health of existing PSH projects that previously received state funding and project future supportive housing service needs.	IHDA, IDHS, IDoA, SHWG, IDHFS	L, CP
	Explore opportunities to leverage and coordinate commitments and benefits for supportive housing from other systems that serve high-need populations.	IHDA, IDHS, IDHFS, IDoA	L
Maximize use of funding sources to serve the housing and service needs of elderly and special needs populations living in community-based housing.	Continue exploring Medicaid waiver resources to support housing through services and savings for persons with mental illness and/or DD, and supporting the State's move to Managed Care/Coordinated Care Program.	IHDA, SHWG, IDHFS	L
	Explore the options available to create Medicaid-funded Housing Pre-Tenancy and Tenancy Sustaining Services across vulnerable populations.	IHDA, IDHS, IDHFS, IDoA	L
Incentivize affordable housing development in communities of preference to meet the needs of these populations.	Improve methodology for determining the communities of preference, if appropriate.	IHDA, IDHS, IDHFS	AC, CP
	Collect Information primarily from Continuum of Care, health systems, and the Illinois Department of Corrections to understand service needs and leverage coordination opportunities between housing, health, corrections and employment agencies to meet needs of SH populations.	IHDA, IDHS, IDHFS	L
	Research the effectiveness and assess impact of alternative incentive strategies in the QAP with an eye on increasing development of PSH where it is needed throughout the Illinois.	IHDA, IDHS, Developers, IDoA	CP
* Creation and Preservation (CP), Affordability and Choice (AC), Leadership (L)			

## Transforming Healthcare and Human Services

### Transforming Healthcare and Human Services Chart

Major Events in Healthcare and Human Services Transformation Initiatives Related to Olmstead Classes (December 2016)				
Impetus [Lead Agency]	Description	Populations Affected	Geography Affected	Eligible Community - Based Housing
Money Follows the Person (MFP) [IDHFS]	Federal demonstration program providing enhanced Medicaid match (for waiver and State Plan services provided in first year of community residency) to support transitions of seniors and persons with disabilities out of institutions and into eligible community-based settings.	Persons with Mental Illnesses (MI), Developmental Disabilities (DD), Physical Disabilities (PD), and the Elderly currently living in Medicaid-funded assisted facilities.	Statewide	Scattered site supportive housing; single site supportive housing; Supportive Living Program (SLP); group homes of four beds or less (e.g., CILAs).
Ligas v. Norwood Consent Decree* [IDHS - DDD]	State found in violation of Title II of ADA, and Title XIX of Social Security Act for not appropriately housing persons with disabilities in least restrictive settings. Consent decrees include required transition goals for housing and services.	Residents living in private Intermediate Care Facilities for the Developmentally Disabled (ICFs-DD) of 9 beds or more and persons on a PUNS waiting list for services. Persons must request community-based services or community-based placement to be considered part of Class.	Statewide	Community housing of no more than 8 beds (e.g., CILAs, ICFs-DD). CILAs to be 4 beds or less to qualify for MFP enhanced match.
Williams v. Rauner Consent Decree* [IDHS - DMH]	State found in violation of Title II of ADA, Section 504 of Rehab Act, and Title XIX of Social Security Act for not appropriately housing persons with disabilities in least restrictive settings. Consent decree includes required transition goals.	Residents living in (Non-Medicaid) Institutes for Mental Disease (IMDs).	Statewide, although 17 of 24 IMDs are in Chicago metro area (Cook County)	Scattered site supportive housing; single site supportive housing. No more than 25% class members in any given development; Bridge Rental Subsidy as major source of rental assistance.
Colbert v. Rauner Consent Decree* [IDHFS]	State found in violation of Title II of ADA, Section 504 of Rehab Act and Social Security Act for not appropriately housing persons with disabilities in least restrictive settings. Consent decree includes required transition goals for housing and services.	Residents with disabilities living in Medicaid-funded Skilled Nursing Facilities (SNFs) in Cook County.	Cook County (only)	Scattered site supportive housing; single site supportive housing; Supportive Living Program (SLP); other appropriate affordable housing.
Facilities Closures [Governor's Office / IDHS]	In 2011, then-Governor Quinn moved to close several State operated facilities not only as cost savings measures, but also in the case of SODC's to provide housing for persons with disabilities in the least restrictive settings.	Persons with Intellectual and/or Developmental Disabilities.	Statewide	ICFs-DD; CILAs; other affordable housing option.
*In Olmstead v. L.C. (1999), the U.S. Supreme Court held that unnecessary institutionalization of people with disabilities is discrimination under the Americans with Disabilities Act (ADA). The decision also held that people with disabilities have the right to receive services in the least restrictive living environment. Based on this decision, three lawsuits were brought against the State of Illinois that may impact deinstitutionalization and rebalancing of long term care housing and services for development and rental assistance resources throughout the state. IHDA is not a named party to the lawsuits, but is making financial and technical assistance resources available to help meet the identified housing needs.				

Transforming Healthcare and Human Services Chart, Continued

Major Events in Healthcare and Human Services Transformation Initiatives Related to Olmstead Classes (December 2016)		
Impetus [Lead Agency]	Overall Goals	Status/Revised Goals
Money Follows the Person (MFP) [IDHFS]	<p><u>Goals for CY 2016:</u> SMI: 40; DD: 40; PD: 61; Elderly: 44; Colbert: 360; Total of 545 to be transitioned by end of 2016.</p> <p>Note: includes eligible transitions from Colbert, Ligas and facilities closures. DD goals include eligible Ligas &amp; State facilities' transitions that move to a MFP-qualified residential setting (four-bed or smaller CILA). Future Colbert transitions contingent upon cost-neutrality analysis.</p>	<p>2,726 individuals have been transitioned as of 11/30/2016 (SMI: 389, DD: 40, PD: 421, Elderly: 400, Colbert: 1202).</p> <p>2016 goals/status, non-cumulative: SMI: 15/40, DD: 18/40, PD: 29/61, Elderly: 37/44, Colbert: 270/360. There have been 369 transitions so far in 2016, which is 67.7% of its 2016 goal.</p> <p>Note: State has a goal for 95% of Colbert transitions to be MFP enrollees. Currently, approximately 82% of the Colbert transitions are MFP participants.</p>
Ligas v. Norwood Consent Decree* [IDHS - DDD]	<p>Offer community-based services or placement to 3,000 persons with DD currently living at home that are on the PUNS waiting list, over a 6 year period (1,000 people by the end of Year 2, an additional 500 people each subsequent year). The goal of transitioning 301 class members (one-third of 902 class size) by 12/31/13 has already been met. Transition second third of class by 12/31/15 (301); transition final third by 12/31/17 (300).</p>	<p>As of December 1, 2016, 1,477 people living in ICFs/DD have become Class Members and 1,356 of them have initiated waiver services.</p> <p>As of December 1, 2016, there are approximately 5,000 people that have been authorized from the PUNS waiting list and 2,778 of them have initiated waiver services.</p> <p>The Ligas Defense has made initial contact with every class member at this time. Discussions are in the works for the transition goal after referrals are finalized at the end of the six-year period.</p>
Williams v. Rauner Consent Decree* [IDHS - DMH]	<p>Initially evaluate 100% of class (roughly 4,500 persons) within 2 years; reevaluate annually beginning in Year Three. Transition 256 persons Year One (July 2011-June 2012); 640 persons Year Two, 832 persons Year Three, 1,306 Year Four, and 1,706 Year Five (all cumulative).</p>	<p>The State reached and exceeded the Year One goal of 256 total transitions, transitioning 282. The State met and exceeded the Year Two cumulative goal of 640, transitioning 643. The State met and exceeded the Year Three cumulative goal of 832, transitioning at least 1,100. The State reached and exceed its Year Four cumulative goal of 1,306, transitioning 1,312. The program's five-year plan ended June 30, 2016, with a cumulative total of 1,742. As of 6/30/2016, the State had transitioned 347 in Year Five, at 86.8% of its FY16 target number, 400.</p> <p>Transitions have continued as part of the State's continued compliance. As of 11/19/2016, the State continues to transition class members eligible and has transitioned 98 persons since the beginning of FY16, 24.5% of its goal for 400 transitions.</p>

Colbert v. Rauner Consent Decree* [IDHFS]	Transition 300 by 11/8/13; transition additional 500 by 11/8/14; transition additional 300 by 5/5/15 for a total of 1,100 transitions. Year one goal was not met; therefore, second year goal was to transition 800 by 11/8/2014. The year two goal not met. 1,100 by 5/8/2015 (year 3). The new goal was to transition 1,100 by 11/30/2015 and this goal was met.	The initial Implementation Plan was approved by the judge on November 8, 2012. Evaluations began February 2013 but the Year 1 transition goal of 300 by 11/8/2013 was not met. Department on Aging took over as lead agency from HFS in January 2014.  A total of 794 class members transitioned by 05/31/2015. A new goal was agreed to transition 1,100 class members by 11/30/2015. The State met its 1,100 goal. As of 10/31/2016, the State has transitioned a total of 1,430 class members. The State is now in negotiations to update the implementation plan according to the agreed upon cost neutral plan.
Facilities Closures [Governor's Office / IDHS]	Jacksonville Developmental Center closed on 11/21/2012. Murray Developmental Center was scheduled for closure in 2013, but a lawsuit by advocates wishing to keep Murray open was made against the State of Illinois, halting its closure until further notice.	In June of 2014, a federal judge in Chicago ruled that the state can close the Murray Developmental Center in Centralia. No specific closure date has been identified; however, in July, a letter was sent to parents and guardians informing them of their options and asking them to consider possibilities for their family members. After the gubernatorial elections in November 2014, Governor Rauner announced in April 2015 that he would keep the center open until residents' needs could be met in the community.
All of the programs and consent decrees rely on the following housing resources: Low Income Housing Tax Credits; HOME; Affordable Housing Trust Fund; Community Development Block Grant; CILA; Bridge Rental Subsidy (Williams and Colbert class members only); Rental Housing Support Program-Long Term Operating Support; HUD Section 811 Rental Assistance Demonstration PHA-administered Housing Choice Vouchers; PHA-administered Project-Based Vouchers; and, private housing resources, where appropriate.		

### Money Follows the Person

Since 2008, the Illinois Department of Healthcare and Family Services (IDHFS) has been a part of the federal Money Follows the Person (MFP) Demonstration Program. MFP is a federal demonstration program providing enhanced Medicaid match (for first year of community-based residency) to support transitions of seniors and persons with disabilities out of institutions and into eligible community-based settings. The program is administered by the federal Centers for Medicaid and Medicare Services (CMS). Illinois renamed MFP as Pathways to Community Living in calendar year 2012.

IDHFS continues to coordinate with Illinois Department of Human Services (IDHS), Illinois Department on Aging (IDoA) and IHDA on transitioning persons out of nursing homes and other qualified institutional facilities into community based housing. The targeted populations include persons with physical disabilities (PD), developmental disabilities (DD), mental illness (MI), the elderly, persons with AIDS and those with Traumatic Brain Injury (TBI). Colbert consent decree class members also count towards meeting MFP program goals.

MFP is set to finish referrals by July 2017 and all transitions must be completed by 2020. Agencies involved are working towards ways to sustain the services that MFP provides after the program ends.

As of November 2016, a cumulative total of 2,726 persons have been transitioned into community-based housing.

Cumulative Transitions / Cumulative Goals through Calendar Year 2016:  
 Physical Disabilities #: 421/494  
 Developmental Disabilities #: 314/303  
 Mental Illness #: 400/389  
 Elderly #: 400/398



## Consent Decrees

### *Ligas v Norwood*

The Ligas v. Hamos lawsuit was filed in 2005 on behalf of individuals with developmental disabilities who were residing in private, state-funded facilities (Intermediate Care Facilities for Persons with Developmental Disabilities or ICFs/DD) of nine or more persons or who were at risk of being placed in such facilities. The Illinois Department of Human Services' Division of Developmental Disabilities (IDHS/DDD) is the lead agency responsible for oversight of the Ligas consent decree, which includes two distinct groups of class members with developmental disabilities (DD):

- Group 1: Comprised of persons with developmental disabilities who are residing in larger Intermediate Care Facilities of nine persons or more, and who affirmatively request to receive community-based services or placement in a smaller community-based setting.
- Group 2: Comprised of persons who are living at home and who are on a Prioritization of Urgency of Need for Services (PUNS) waiting list for community-based services or placement in a community-based setting, who affirmatively request the same.

Implementation of this consent decree, which is a statewide initiative, started in 2011 and is to continue for the next six years (through 2017).

Group 1's class size, as of December 1, 2014, was 1,290 individuals. The State had to transition two-thirds of these individuals by December 31, 2015. The State's goal is to transition all individuals in this group by 6/30/2017. For the second group of class members, the State must offer community-based services or placement to 3,000 persons living at home and/or on the PUNS waiting list over the defined six-year timeframe. This can be further broken down into 500 persons per year, with 1,000 by the end of Year Two, and an additional 500 persons each year thereafter until 6/30/2017 (calendar year).

The total Class Member size has grown since year one. Currently, there are a total of about 15,600 people in the Class. The numbers of Class Members fluctuate on a regular basis and are updated and presented quarterly at every Parties meeting. As of December 1, 2016, 1,477 people living in ICFs/DD have become Class Members and 1,356 of them have initiated waiver services; there are also approximately 5,000 people that have been authorized from the PUNS waiting list and 2,778 of them have initiated waiver services. It should also be noted that individuals in the first group who are served and who live in Community Integrated Living Arrangements (CILAs) of four units or less qualify for the MFP program enhanced reimbursement rate for the first year of community living.

### *Williams v Rauner*

In 2010, a court-ordered consent decree was issued (formerly known as Williams vs. Quinn). This decree made the State responsible, through the Illinois Department of Human Services' -Division of Mental Health (IDHS/DMH) and its partner co-defendants, the Department of Public Health and IDHFS (the State's designated Medicaid Authority). These State agencies were charged with transitioning qualified and consenting residents in State-funded, non-Medicaid nursing homes (designated as Institutes for Mental Disease (IMDs)) who wish to move into community-based housing with person-centered support services.

There are twenty-four (24) IMDs throughout Illinois, 17 of which are located in the Chicago metropolitan area. The remaining IMDs are located in Kankakee County (2), Lake County (3), one in the City of Peoria and one in the City of Decatur. Most residents of IMDs have a primary diagnosis of Serious Mental Illness (SMI), with a high percentage having dual diagnoses of substance abuse or complex/co-morbid medical conditions. The following highlights Williams v. Rauner transition goals and progress:

- The State met and exceeded its Year One goal of transitioning 256 class members, and achieved 282 transitions by November 30, 2012.
- The State met and exceeded its Year Two goal of transitioning 640 class members (cumulative) and achieved 642 transitions by June 30, 2013.

- The State met and exceeded its Year Three goal of transitioning 832 class members (cumulative) by June 30, 2014 and achieved 960 transitions by June 30, 2014.
- The State had a Year Four goal of transitioning 1,306 class members (cumulative) by June 30, 2015. The State almost met its goal in Year Four, transitioning 99.8% of its 1,306 goal, with 1,304 transitioned.
- The State did not meet its goal for Year Five; as of June 30, 2016, the State had transitioned 347 in Year Five, at 86.8% of its target number, 400.
- As of 11/19/2016, the State continues to transition eligible class members and has transitioned 98 persons since the beginning of FY17, 24.5% of its goal for 400 transitions.

The Williams Consent Decree's settlement has a budget line item allocation specifically dedicated for Bridge Rental Subsidy to offset rental cost for class members. This comes from General Revenue Funds (GRF).

IDHS/DMH has expanded permanent supportive housing to include project-based/clustered housing options using existing housing developments in Cook County. In 2014, IDHS/DMH created and successfully implemented a Clustered Housing Model pilot on Chicago's north side. The cluster housing model are PSH units located in close proximity, in a building or buildings closely situated. This model has 24-hour peer support staff on the premises. In April 2015, a second Clustered Housing Model was implemented utilizing a scattered site setting on the Chicago's south side. This project targets Williams Class Members deemed "Unable to Serve". Unable to Serve class members are those who have been recommended for community transition, but their selected community provider has responded to DMH that they cannot meet their clinical/support needs due to one or more of the following service needs: financial, medical, medical/diabetes, medication management and/or psychiatric/behaviors. DMH conducted a six-tier initiative to analyze this population, to try and determine the reasons why certain Class Members are being categorized as Unable to Serve and what might be recommended to reduce that number. DMH also commissioned UIC to do a study on the people who have returned to IMDs to better understand those circumstances.

### ***Colbert v Rauner***

The Colbert v. Rauner (originally Colbert v. Quinn) lawsuit was filed in 2007 on behalf of persons who reside in skilled nursing facilities (SNFs) in Cook County. This lawsuit alleged that persons with disabilities were unnecessarily segregated in nursing facilities in Cook County, and that the State did not allow this population options to live and receive services in community-based settings. The State agreed to comply with a court Consent Decree that was filed in November 2011. IDHFS assigned to be lead agency, crafted the Implementation Plan that would support the transition needs of the very diverse nursing home population, including: allowing them to self-refer for transition services; providing them with evaluations by a multi-disciplinary team that would identify service needs; arranging the provision of those services; and monitoring the effectiveness of those services. The State finished executing the last contracts according to this plan in August 2013.

In November 2013, the State decided to move the lead agency's role to the Illinois Department on Aging, after the first-year transition goals were not met under HFS. IDoA assumed the leadership of the Colbert Consent Decree Implementation Phase II for the State on January 21, 2014. The first months were spent carefully evaluating all of the aspects of implementation while attempting to make changes that would net the best result in terms of transition activities and quality outcomes. One major outcome was the establishment of a new Implementation Plan that was negotiated with the Plaintiffs and filed with the Court in August 2014. The Governor's Office, Illinois Department on Aging and IDHS/DMH have supported this project and collaborated to develop more streamlined and comprehensive evaluative procedures for Class Members.

IDoA established a Year 3 goal of 1,100 class members by May 8, 2015. Year 3 goals were not met; however, a new goal was agreed to: to transition 1,100 class members by November 30, 2015. The State was able to meet its 1,100 goal, having transitioned 1,101 Colbert class members. As of October 31, 2016, the State had transitioned 1,742 class members. The Defendants Cost Neutral report found that the State, on average, saved 37.5% of the funds it used per person in an institution once the person moved to the community. The parties negotiated to develop a cost neutral plan that would be incorporated in an updated implementation plan. The court released the cost neutral plan agreements in November of 2016.

### ***Joint Consent Decree Efforts***

Both Williams and Colbert are participating in an Individual Placement and Supports (IPS) Supported Employment Initiative. IPS is evidence-based employment services for people with serious mental illness (SMI). DMH hired a program manager for this supported employment project, who is tasked with visiting community drop-in centers and engaging class members to encourage them to participate. The program manager started in October 2015 and she provides quarterly updates to the Williams and Colbert Parties Meeting on her progress.

Both agencies are also contracting with the University of Illinois-Chicago's School of Nursing to provide in-person trainings and webinars on a variety of topics to help service providers improve transitions and become more aware of Class Members chronic health needs.

Since a meeting with the Court Monitor in July 2016, DHS and IHDA are also looking into strategies to create more cluster models; small, single-site properties; and to do more extensive landlord outreach.

### **Supportive Housing Options (SHO) Initiative**

In April of 2015 the state launched the Supportive Housing Options (SHO) Initiative to provide supportive housing options for individuals with intellectual and/or developmental disabilities. Due to the Olmstead Supreme Court Decision, the Americans with Disability Act and other federal statutes, the Centers for Medicare and Medicaid, the Department of Health and Human Services and the Department of Justice have called for more person-centered services and housing options that are integrated into the community.

The Supportive Housing Options Initiative provides access to affordable supportive housing options specifically for Ligas Class Members coupled with the supportive services needed by the Ligas CM to live an integrated life in the community. The Supportive Housing Options (SHO) Initiative, through the Section 811 Project-Based Rental Assistance Demonstration Program and the Statewide Referral Network, seeks to give people with disabilities an opportunity to receive a rental subsidy or a unit with an affordable rent. This will make it possible for people with very low incomes to access an apartment, condo or house.

In partnership with the IDHS/DDD, SHO has defined a service structure that will support people with intellectual and developmental disabilities moving into consumer controlled apartments, condos or houses using the Intermittent CILA service package as a base with additional hours of support service added based on the persons service needs. The IDHS/DDD will continue to refine Medicaid service definitions in order to improve access to the individualized level of service that each person needs in order to successfully reside in affordable supportive housing options.

Please note that CILAs must meet four unit limits to qualify for the Money Follow the Person (MFP) enhanced match. Currently, Supportive Housing Options Initiative units are being developed in Metro East (Edwardsville, Collinsville, and Alton), Champaign-Urbana, Bloomington-Normal and Chicago and the collar counties.

### **Public Housing Authority Preferencing**

In early 2013, HUD's Office of General Counsel approved a statewide Coordinated Remedial Plan for the State of Illinois which allows local public housing authorities (PHAs) to establish preferences on their Public Housing and/or Housing Choice Voucher waiting lists for Olmstead populations. They are allowed to adopt a remedial preference which specifically allows them to provide preference to persons with disabilities who are leaving one of the State-licensed facilities that are subject to one of the three court consent decrees previously discussed (Colbert, Williams, and Ligas) or are participating in the Money Follows the Person Program (MFP), and those who are seeking to move out of a State-Operated Developmental Center (SODC). The strategy is to further expand affordable housing choices for persons with disabilities and consent decree class members.

PHAs must still revise their Public Housing Plans to reflect the requested preference and request a waiver. These requests are submitted directly to the HUD Chicago Regional Office instead of HUD Headquarters in Washington D.C. In 2014, IHDA worked with the Governor's Office of Health Innovation and Transportation (GOHIT) and Illinois-based PHAs to promote participation in this program and provide any needed training. In order to maximize impact, data was collected from all class action lawsuits, SODC moves and MFP needs were collected and used to target outreach to PHAs.

The Statewide Housing Coordinator (SHC) from DHS is a key participant in this effort. The SHC has worked with several PHAs in the past four years to establish agreements for voucher and public housing unit set-asides. These set-asides are specifically for the populations described above, which are also eligible for the Section 811 program. The Defendants for all three consent decrees have worked with IHDA and the SHC to connect Class Members to Statewide Referral Network units, including Section 811 units. They have also worked with the SHC to secure housing vouchers and public housing units through local public housing authorities including Cook County, the City of Chicago, Rockford, Decatur and Lake County.

All of these public housing authorities committed housing choice vouchers and/or public housing units as match to the State's/IHDAs two approved Section 811 applications to HUD. These match resources are replacing some bridge rental subsidies that many Class Members are currently using to make community based housing affordable. The bridge subsidies are State rental housing subsidies (funded through the General Revenue Fund) which helps them pay a portion of their rent and provide household necessities (e.g., furniture, appliances) when needed. Bridge rental subsidy was designed to be short-term assistance. Currently, the SHC is working with bridge subsidy recipients from Williams and Colbert to place people in set-aside PHA vouchers. The table below shows how many vouchers and public housing units that PHAs have committed to this effort.

### Section 811 Match

Award Year	PHA	Match Type	Number	Special Conditions
2012	Chicago Housing Authority (CHA)	Housing Choice Vouchers (HCV) Project Based Vouchers (PBV) Accessible Public Housing units	Up to 60	Total of 400 vouchers or units + additional 200 HCV
2012	Housing Authority of Cook County (HACC)	Low Income Public Housing (LIPH) Project Based Vouchers (PBV) Housing Choice Vouchers (HCV) Non Elderly Disabled (NED)/Mainstream Special Purpose Vouchers (SPV)	10% Annual Turnover + 10% of new PBV 35	Annual Turnover (LIPH, PBV, HCV) New PBV 1 <sup>st</sup> year approx. 120 units in total, annualized
2012	Rockford Housing Authority (RHA)	Housing Choice Vouchers (HCV) Public Housing Units	50 30	Non-elderly disabled, one time
2014	Decatur Housing Authority (DHA)	Low Income Public Housing (LIPH) Housing Choice Vouchers (HCV)	15 15	Turnover vouchers, one time
2014	Housing Authority of Cook County (HACC)	Housing Choice Vouchers (HCV) Project Based Vouchers (PBV)		Total of 60 turnover vouchers, annualized
2014	Lake County Housing Authority (LCHA)	Housing Choice Vouchers (HCV)	100	Turnover vouchers

### State Facilities Closures

The trend among states for the last few decades has been to close large, State-Operated Development Centers (SODCs). The process is usually driven by advocates with disabilities and parents, closely allied with state administrators. It is seen as a way to save State revenues, as the costs of keeping someone in an SODC are significantly higher than moving them into community-based housing outside of the institution, which is also more consumer-driven or person-centered. As of November 2015, three Illinois Institutions have closed: two Mental Health Centers (Tinley Mental Health Center in Tinley Park and the Douglas Singer Mental Health Center in Rockford) and one SODC in Jacksonville.

## Home First

In December of 2011, IFF and Access Living launched Home First to address the need for integrated affordable accessible housing for people with disabilities as a result of the Americans with Disabilities Act (ADA). Under Home First, IFF acquires, develops, and owns integrated housing – with a strong focus on increasing accessible housing stock – that remains permanently affordable to very low-income people with disabilities. These developments provide permanent housing options for people leaving institutions and persons in need of affordable accessible housing. IFF also partners with public housing authorities, which provide project-based vouchers for Home First units to ensure these units are affordable to those who live on Supplemental Security Income or Social Security Disability Insurance.

The Illinois Housing Development Authority initially awarded \$15 million to the program in 2011 through the Build Illinois Bond Program, which resulted in 70 wheelchair accessible rental units across 17 condominium buildings in seven Chicago neighborhoods and five suburbs, for people leaving nursing homes via the Colbert Consent Decree Implementation Plan. Home First Illinois also received a \$4 million grant from Chase Bank and operating funds for Home First staff from the Chicago Community Trust. Initially, Home First primarily developed in the Chicago metropolitan area, but has since expanded the program statewide by leveraging loans, tax credit equity, and grants.

As of November 2016, Home First is in the process of developing an additional 54 units in the Logan Square neighborhood. There is a Colbert preference for these units and class members can access them through the Statewide Referral Network. Home First has also developed units in Peoria with a preference for Williams Class Members (there is an IMD in Peoria). IFF will continue to purchase units, renovate them and make them available for the disability community, including Colbert and Williams Class Members.

## State Referral Network / Illinois Housing Search Website

ILHousingSearch.org is an online, web-based affordable housing locator that lists available affordable housing throughout the state. Users are able to search for housing by geographical location, size, price, accessibility features, amenities, and other eligibility criteria. As of December 8, 2016, 7,414 landlords had registered 104,939 units throughout the state, with only 3,278 units available in the entire Illinois Housing Search database. As of December 2016, there have been 4,988,477 searches, since the website was created, with 1,070,821 searches just in 2016, as of December 8, 2016.

Created within IHDA's LIHTC Program, the Statewide Referral Network (SRN) began in 2007 to link vulnerable populations, who are already connected to services, to affordable, available, supportive housing. SRN units are financed to be affordable for persons with extremely low-incomes. Eligible populations include persons with disabilities, persons experiencing homelessness and persons at risk of homelessness. LIHTC Targeting was included in the 2015 QAP and was once again included in the 2016-2017 QAP, with additional points awarded to projects proposing developments that include SRN units. In November 2015, IHDA developed a SRN fact sheet, which provides information for property owners and managers interested in participating in the SRN.

Embedded within the State of Illinois' housing locator website is a password-protected login used to access the SRN and Section 811 Housing Waiting Lists. The SRN Housing Waiting List receives referrals from various service providers (housing locators, transition coordinators and care coordinators) through the Pre-Screening, Assessment, Intake and Referral (PAIR) module. Launched in June 2015, the PAIR module is a waitlist management system that allows for the pre-screening of individuals for eligibility through an initial questionnaire, collecting more details of those who potentially qualify for intake onto a waiting list. The Housing Waiting List Manager then facilitates the matching and referral of qualified applicants to properties with SRN units. The PAIR module is the only way to refer eligible people to an SRN unit. There are approximately 1,400 units available within the SRN. As IHDA continues to create additional developments with SRN units, this number is expected to grow.

SRN has primarily been overseen by the Statewide Housing Coordinator (SHC) in participation with the IHDA. Other agencies involved via an intergovernmental agreement are IDoA, IDHS and IDHFS.

## HUD Section 811 Program

In February 2013, the State was awarded \$11.9 million from HUD to provide up to 732 project-based vouchers to persons with disabilities who were coming out of nursing homes and other institutional facilities to help them transition back into the community. This money was set to also help assist Illinois in its efforts pertaining to meeting obligations set into place by the three consent decrees (Williams, Colbert and Ligas), as well as the Money Follows the Person Program and SODC closures.

In November 2014, after thorough negotiations, both IHDA and HUD finalized the Cooperative Agreement, and IHDA submitted its Affirmative Fair Housing Marketing Plan (AFHMP) to HUD on February 9, 2015. Working from recommendations given to IHDA by its Section 811 Interagency Panel (formed to engage all applicable State sister agency stakeholders) IHDA identified 10 initial developments, totaling 77 units, to participate in the initial allocation determination phase of Section 811 Program. IHDA is currently in the process of obtaining signed Rental Assistance Contracts (RACs) from these developments which will guarantee that units, as they become available, will be held open to be filled by persons from the above priority populations.

On March 2, 2015, HUD announced it was awarding a total of \$150 million in newly authorized rental assistance funds under the Section 811 Program to 25 State Housing Finance Agencies to provide permanent homes and services to extremely low-income persons with disabilities. These funds will continue to help prevent thousands of individuals with disabilities from being unnecessarily institutionalized or possibly falling into homelessness. IHDA was awarded \$6.42 million, which it projects will assist approximately 200 households.

The Section 811 Project Based Rental Assistance Demonstration Program assists low income households with long-term disabilities to live independently in the community by providing affordable housing linked with voluntary services and supports. Starting in FY15, the new Section 811 program began to create hundreds of additional units of integrated permanent supportive housing every year by: (1) providing stronger incentives to leverage other sources of capital for 811 units, including federal Low Income Housing Tax Credits, HUD HOME funds and bond financing; and (2) authorizing a 'stand-alone' Project Based Rental Assistance approach to help state and local governments systematically create integrated supportive housing units in affordable rental housing developments. CMHCs and Housing Specialists can access the Section 811 units by placing Class Members onto the PAIR module's 811 Waiting List within the ILHousingSearch.org web-based housing locator.

The Section 811 Interagency Panel meets regularly to review data from Williams, Ligas, Colbert and Money Follows the Person and talk about interagency initiatives to improve access to 811 units. One of these initiatives involves determining what the communities of preference will be in each QAP round. Proposed developments with SRN units building in communities of preference are awarded additional points in QAP to encourage affordable housing development in those areas where persons have moved and wish to move involved with Williams, Ligas, Colbert and Money Follows the Person. Communities of preference in the 2016-2017 QAP include: (within the city of Chicago) Uptown, Rogers Park, Near West Side, West Town, Edgewater, Lincoln Park, South Shore, Austin, Hyde Park, South Lawndale, Lake View, and Clearing; (cities) Peoria, Kankakee, Bourbonnais, Champaign, Urbana and Decatur; (counties) Cook, DuPage, Kane, Kendall, Lake, Madison, McHenry, McLean, Sangamon, St. Clair, Will and Winnebago.

IHDA has worked with Social Serve over the past year to create a new Section 811 monthly periodic poll email in addition to the SRN monthly periodic poll, in order to capture Section 811 unit availability information as Section 811 units are added to the portfolio. The Statewide Housing Coordinator is continuing to work with Social Serve on issues that arise within the PAIR online waiting list module to improve performance and matching. New contract negotiations for FY 2017-2018 will start at the beginning of 2017.

IHDA continues to sign Rental Assistance Contracts (RACs) with new projects that are beginning to come online, to secure Section 811 units in new developments. When a project is 65% construction complete, the Housing Waiting List Manager begins looking for referrals for the property. IHDA also signs Agreements for Rental Assistance Contracts (ARACs) for currently operating properties that will have open units in the near future in communities of preference.

Due to unforeseen delays with HUD in establishing the rental assistance payments process for the Section 811 Program, IHDA began bringing individual projects to its Board for approval in 2015. As of September 2016, 104 units have been Board approved. Referrals will continue to be made for persons on the PAIR module

Section 811 waiting list. Anyone who is eligible for Section 811 is also eligible for the Statewide Referral Network waiting list.

### **Illinois Rental Housing Support Program (RHSP) and Long Term Operating Support (LTOS) Program**

The Illinois Rental Housing Support Program is a State-funded rental assistance program developed with annual appropriation of approximately \$25-30 million. The funding comes from a \$10 real estate document recording fee collected at the county level, \$1 of which stays with the county and the balance is deposited into a RHSP fund. The RHSP is designed to provide long term assistance for permanent housing. Resources are allocated statewide based on a formula, with the Chicago administered program receiving 43% of resources. The Illinois Housing Development Authority (IHDA) administers the program for the balance of the State. IHDA then allocates rental assistance funding to local administering agencies across the State, which manage their own waiting lists.

On a per year basis, a minimum of 10% of the funding under RHSP is available as the Long Term Operating Support (LTOS) Program to provide up to fifteen years of long-term, project based, rent subsidy to newly available affordable units, in order to increase the supply of affordable housing to households earning at or below 30% of Area Median Income (AMI). RHSP (including LTOS projects) currently funds 1,175 units with rental assistance subsidy. At this time, IHDA predicts about 150 new rental assistance subsidies will be issued through the LTOS Program in FY 2017, based on an estimated range of subsidies becoming available as State funds from previous fiscal years are provided to IHDA.

A new Long Term Operating Support Program (LTOS) request for application is also an available resource. Rental subsidies will be provided over 15 years to eligible landlords serving households referred through the Statewide Referral Network. LTOS grants will be awarded to the highest scoring applications to bridge the gap between the contract rent and what extremely low-income households can afford to pay. Eligible developments must be located outside the City of Chicago, meet the accessibility requirements listed in the Request for Application, and commit to accepting tenants referred through the Statewide Referral Network in order to be considered. Applications for LTOS are now being accepted on a rolling basis until further notice.

### **Permanent Supportive Housing Development Request for Applications**

IHDA released a request for application for a third round of the Permanent Supportive Housing Development Program (PSH). The program will fund developments serving extremely low-income persons with disabilities, persons experiencing homelessness and other vulnerable populations. Eligible developments may contain no more than 25 units and are required to set aside a minimum of 10 percent of units for referrals through the Statewide Referral Network. Funding will be awarded to the highest scoring applications. PSH applications are due January 30, 2017.

### **Illinois Supportive Living Program**

Illinois' Supportive Living Program is a Medicaid approved home and community-based assisted living option administered by the IDHFS that offers elderly (65 and older) or persons with physical disabilities (ages 22-64) housing with services. The aim of the program is to preserve privacy and autonomy while emphasizing health and wellness for persons who would otherwise need nursing facility care.

By combining apartment-style housing with personal care and other services, residents can still live independently and choose what services to receive. IDHFS currently operates this program through a Medicaid waiver which allows payment for services that are not routinely covered by Medicaid. These include intermittent nursing, personal care, homemaking, laundry, maintenance, medication supervision, meals, social activities, recreation, arranging or providing transportation, health promotion and exercise and 24-hour staff to meet residents' scheduled and unscheduled needs. The resident is responsible for paying the cost of room and board at the facility. In 2016, the number of operating supportive living sites grew from 145 communities to 147, increasing the capacity from 11,825 apartments to 12,050 apartments. Of the 147 communities, nine serve people ages 22 to 64 with physical disabilities. Fourteen sites have been approved for the Supportive Living Program and are in various stages of construction and development, including four that will serve people ages 22-64 with physical disabilities. In all, there are Supportive Living (SL) communities in 73 counties in Illinois. The Centers for Medicare and Medicaid has defined Illinois' program as meeting the requirements of a "community-based setting". Supportive Living Program providers are among the State's nine current Medicaid waivers.

Housing Task Force members have recommended expansion of the Supportive Living Program Memory Care Pilot Project. The IDHFS pilot program initially approved five projects located in South Elgin, North Aurora, Decatur, Rantoul, and Effingham. The five SL communities selected by the Department to provide memory care have been very successful. The original five projects are still open and running. Illinois' significant Alzheimer and related dementia demographics point to the need for additional memory care units. The Alzheimer's Disease Illinois State Plan, released January 2014, supports expansion of the Department's affordable memory care pilot program. Such specialized housing would be beneficial to low-income seniors, available resources permitting. In September 2016, the Department began accepting application for new SL dementia care settings.

The Housing Task Force encourages IDHFS to expand its pilot program to provide care in SL communities for persons age 22 and over, including those who have a diagnosis of Alzheimer's disease or related dementia.

## Health and Housing

### Care Coordination Plan and Managed Care

Public Act 96-1501 ("Medicaid Reform") required that 50% of Illinois Medicaid clients be enrolled in some type of care coordination program by January 1, 2015. Illinois met this requirement by enrolling more than 60% of the Medicaid population into a care coordination program. There are 30 Illinois counties in the five mandatory managed care regions: Rockford, Central Illinois, Metro East, Quad Cities, and the Greater Chicago Region. There are also 15 counties where managed care enrollment is voluntary.

Care Coordination manages the care needs of an individual by providing the client a medical home with a primary care physician, referrals to specialists, diagnostic and treatment services, behavioral health services, inpatient and outpatient hospital services, dental services, and when appropriate, rehabilitation and long term care services. The benefits of care coordination include better health for the member and a better quality of life for the member at a reduced cost.

IDHFS has implemented four care coordination programs: the Integrated Care Program (ICP), the Medicare Medicaid Alignment Initiative (MMAI), the Family Health Plan Program (FHP), and the Medicaid Managed Long Term Services and Supports (MLTSS) Program. The MLTSS program was introduced July 2016 to the Greater Chicago region. As of October 2016, a total of 2,070,092 clients have enrolled in Health Plans offered by manages care entities.

In Illinois, Care Coordination through these Medicaid programs was once offered through various "managed care entities." That included Managed Care Organizations (MCOs), Managed Care Community Networks (MCCNs) Coordinated Care Entities (CCEs), and Accountable Care Entities (ACEs). ACEs and CCEs were created to develop and implement a care coordination model and provide case management services to Medicaid clients. ACEs and CCEs were phased out throughout 2015 and 2016. ACEs and CCEs have either partnered with existing MCOs, transitioned to become Managed Care Community Networks (MCCNs), or have terminated as an entity.

A description of MCOs and MCCNs is provided here.

**Managed Care Organizations (MCOs)** are HMOs licensed by the Illinois Department of Insurance; they utilize a comprehensive network of providers. Individuals that enroll in an MCO receive all of their Medicaid covered services from the providers that are affiliated with the MCO and must receive prior approval from the MCO to see a nonaffiliated provider. MCOs are health delivery systems designed to provide coordinated care that will reduce unnecessary utilization of services, control costs, and increase and maximize quality.

**Managed Care Community Networks (MCCNs)** are provider sponsored organizations that contracts to provide Medicaid covered services through a risk based capitation fee. MCCNs must be certified by HFS rather than licensed by the Illinois Department of Insurance. MCCNs must be owned, operated, managed, or governed by providers. They cover the same services as an MCO, and their contract requirements with HFS are very similar to the contract requirements for an MCO.



A description of Illinois' four care coordination programs are provided here.

### ***Integrated Care Program (ICP)***

The *Integrated Care Program (ICP)* is a mandatory program for older adults and adults with disabilities (age 19 and over) who have full Medicaid benefits but are not enrolled in Medicare. As of October 1, 2016, HFS holds contracts with 11 MCO/MCCNs to serve the ICP population. ICP covers 30 counties in Illinois, including the entire Greater Chicago Region, Rockford Region, Central Illinois Region, Metro East Region and the Quad Cities Region. As of October 1, 2016, enrollment under ICP was 121,918.

### ***Family Health Plan Program (FHP)***

The *Family Health Plan (FHP)* Program is for children, their families, and Affordable Care Act Adults who have full Medicaid benefits and are not enrolled in Medicare. FHP is currently operating in 45 counties including the Greater Chicago Region, Rockford Region, Quad Cities Region, Central Illinois Region and Metro East Region (15 additional counties outside the mandatory Regions have one MCO operating FHP in that county. Participation is optional in those 15 counties for enrollees). As of October 1, 2016, HFS holds contracts with 10 MCO/MCCNs to serve the FHP population. As of October 1, 2016 current enrollment for FHP is 1,882,686.

### ***Medicare/Medicaid Alignment Initiative (MMAI)***

In 2013, Illinois and the federal Centers for Medicare and Medicaid Services (CMS) signed a Memorandum of Understanding that approved the *Medicare/Medicaid Alignment Initiative (MMAI)*. MMAI is an effort to reform the way care is delivered to clients eligible for Medicare and Medicaid services (dual eligible) by providing coordinated care.

In 2015 MMAI was operational in 21 counties, including the Greater Chicago Region and the Central Illinois Region. There are 7 MCOs providing services under MMAI. As of October 1, 2016, the enrollment under MMAI was 45,070.

MCOs providing services under MMAI are responsible for covering all Medicare and Medicaid services, including Long Term Services and Supports (LTSS). Enrollees can opt out of MMAI at any time, as well as re-enroll at any time; however, enrollees that receive LTSS in Greater Chicago and request to opt out of MMAI are required to participate in the MLTSS program.

### ***Medicaid Managed Long Term Services and Supports (MLTSS) Program***

The *Medicaid Managed Long Term Services and Supports Program (MLTSS)* is one of Illinois' mandatory managed care programs. This program is for seniors and persons with disabilities who have full Medicaid and Medicare benefits and opt-out of MMAI. This program only covers dual eligibles in the Greater Chicago Region that have opted out of the MMAI. As of October 1, 2016, enrollment under the MLTSS program totaled 21,138. Enrollment for this program will continue into November and December 2016.

### ***Innovation Accelerator Program (IAP)***

In October of 2015, the Centers for Medicare and Medicaid Services launched a new initiative focused on quality outcomes concerning Medicaid-funded Long-Term Services and Supports (LTSS). The Medicaid Innovation Accelerator Program (IAP) is designed to build State capacity and support ongoing innovation in Medicaid. IAP is providing targeted support to states' ongoing delivery system reform efforts across four new program priority areas: (1) substance use disorders; (2) Medicaid beneficiaries with complex needs and high costs; (3) community integration - long-term services and supports; and (4) physical/mental health integration. Illinois applied for IAP's third program area, for its Housing Related Services and Partnerships focus area.

IDHFS submitted its Expression of Interest to participate in the IAP to CMS on December 1, 2015. Illinois was selected in early 2016 as one of eight states in the nation to receive intensive technical assistance. Illinois has a core team of agency staff from IDHFS, IHDA, and IDHS, as well as a representative from CSH. The IAP technical assistance, which included webinars on the basics of Medicaid, housing resources and how to connect them, including case studies from across the country of successful partnerships, began in February 2016 and ended in December 2016. It also involved two forums with the seven other states that were receiving technical

assistance in Washington D.C., where states shared information on their progress with one another and had an opportunity to work directly with their technical assistance providers.

The IAP team meets regularly and has, to date, created: a services crosswalk to determine where service funding may be currently lacking; compiled a housing assessment to look at what existing programs might be underutilized for supportive housing; created an agreed upon Supportive Housing Services definition; and worked on Illinois' 1115 Medicaid Demonstration Waiver application. The IAP team will continue to meet during the 1115 Waiver's review process to determine other Medicaid authorities and populations to provide Supportive Housing Services access.

## **Section 1115 Waiver and Supportive Services**

The Section 1115 Medicaid Demonstration Waiver application is a request for a contract between the State of Illinois and the federal government that waives federal Medicaid requirements and gives the federal government authority to approve experimental, pilot or demonstration projects. The purpose of these demonstrations is to evaluate policy approaches such as providing services not typically covered by Medicaid or creating innovative service delivery systems that improve care, increase efficiency and reduce costs. Illinois submitted an application to CMS in October 2016. Illinois' application is meant to transform services for the behavioral health population, which includes persons experiencing serious mental illness and/or substance use disorders.

Illinois' Section 1115 Medicaid Waiver application is part of the larger Health and Human Services Transformation that places focus on prevention and public health; pays for value and outcomes rather than volume of services; makes evidence-based and data-driven decisions; and moves individuals from institutions to community care to keep them more closely connected with their families and communities. Members will be identified and supported by a digitally enabled system with a comprehensive suite of high-quality service integrating both behavioral and physical health with support from an efficient and effective streamlined state system. The State aims to address the over-reliance on institutional care in several ways.

1. Illinois aims to strengthen community-based behavioral health services, both core (dedicated behavioral health services) and preventative (upstream interventions to prevent behavioral health conditions from arising or mitigate their impact through early identification and immediate treatment). It also seeks to optimize its use of higher-acuity services, providing oversight to ensure that they occupy the appropriate position in the continuum of care, mapping directly to members' needs.
2. The State seeks to strengthen support services, such as housing and employment assistance, to augment and reinforce core and preventative behavioral health services. Illinois believes supportive services are essential for meeting whole-person needs, enhancing the effectiveness of core services and enabling members to improve their own outcomes.

Illinois is seeking to pilot a funding and delivery model for pre-tenancy services and tenancy services (Supportive Housing Services) for individuals with high behavioral health needs who are at risk of homelessness, currently experiencing homelessness or who are inappropriately institutionalized or at risk of institutionalization. Supportive Housing Services proposed include Person-Centered Assessment, Move-In Preparation Services, Relations with property management and community members and Housing Retention Services.

Because stable employment, like stable housing, plays a critical role in helping individuals with behavioral health issues prevent hospitalizations and support their journey to recovery; Illinois also seeks to pilot a funding and delivery model of supported employment for a targeted group of members with high mental health needs that unifies the current fragmented system. This expansion of Individual Placement and Support Services will greatly enhance access to these vital services.

Other benefits the Illinois waiver plans to test include: services to ensure successful transitions for justice-involved individuals at Illinois Department of Corrections and Cook County Jail; redesign of the substance use disorder service continuum; optimization of the mental health service continuum; and additional benefits for children and youth with significant mental health needs.

## Homelessness

### Illinois Interagency Council on Homelessness

The Illinois State Plan to Reduce Chronic Homelessness was submitted to the U.S. Substance Abuse and Mental Health Services Administration (SAMHSA) in December 2013. It affirmed the six core values reflected in *Opening Doors: the Federal Strategic Plan to Prevent and End Homelessness*, which are stated as follows:

1. Homelessness is unacceptable,
2. Individuals with lived experience with homelessness deserve to be treated with dignity and respect,
3. Homelessness is expensive: it is better to invest in solutions,
4. Homelessness is solvable; we have learned a lot about what works and housing, plus appropriate services is the cornerstone for a solution to chronic homelessness,
5. Homelessness can be prevented; and
6. There is strength in collaboration.

The Illinois State Plan's goals also mirror the Federal Strategic Plan:

1. Increase Leadership, Collaboration and Civic Engagement;
2. Increase Access to Stable and Affordable Housing for Persons with Lived Experience with Chronic Homeless;
3. Increase Economic Security for Persons with Lived Experience with Chronic Homelessness; and
4. Increase Health and Stability for Persons with Lived Experience with Chronic Homelessness.

The purpose of the Illinois Cooperative Agreement to Benefit Homeless Individuals (CABHI) program is to enhance or develop the Illinois infrastructure and treatment service systems in order to increase capacity to provide accessible, effective, comprehensive, coordinated/integrated and evidence-based treatment services. CABHI will also provide permanent supportive housing; peer supports; peer navigator(s); and other critical services to persons who experience chronic homelessness with substance use disorders or co-occurring substance use and mental disorders. The outcomes of the program are to include:

1. Assisting Illinois to develop strategies associated with addressing the needs of individuals who experience chronic homelessness; and
2. Increasing the number of individual's places in permanent supportive housing and enrolled in Medicaid and other mainstream benefit (e.g., SSI/SSDI, TANF, and SNAP) programs.

The CABHI project was granted a no cost extension until September 2017. The focus of the project during this time will be on creating a sustainability plan for the ICH to continue beyond project funding, continued support of piloting integration of IPS and SOAR services, completion of a recovery housing environmental scan as well as addressing the goals and objectives within the current Illinois State Plan to Reduce Chronic Homelessness.

## Supportive Housing Working Group

The Housing Task Force first created a Supportive Housing Working Group in 2007 to create common definitions, quantify unmet need and create production goals for supportive housing. Its report was issued in 2008. Since that time, there has been a growing need to update this report to more accurately reflect current and future needs and policy/direction of scarce resources for permanent supportive housing development. The initial report primarily dealt with persons experiencing homelessness and at-risk of homelessness. While these populations remain a very important part of the supportive housing world, there have been a number of events and additional needs that have arisen since then. This includes: changes in the housing market due to the multi-year recession; the impact of three ADA, court-ordered consent decrees involving persons with disabilities; the recognition of supportive housing as a viable alternative for ex-offenders; and reductions in federal and State resources for affordable housing. IHDA has been working with its partner agencies on the Money Follows the Person Program, and has had targeted housing efforts through the SRN for homeless and at-risk populations for years. The need for supportive housing development for veterans, youth aging out of foster care, persons with AIDS/HIV and a portion of the re-entry population are just some of the new need that has arisen.

In the spring and summer of 2016, the Metropolitan Planning Council (MPC) initiated its own effort to research and complete a monograph/report on supportive housing. Per request, IHDA and other State agencies and organizations provided updated data and information to MPC. One of the report's recommendations was to reconvene the Housing Task Force's Supportive Housing Working Group for further study of this subject.

The Supportive Housing Working Group was reassembled in the beginning of 2016 and met regularly through August of 2016 to develop an updated Supportive Housing report. IHDA has been working with key members of the SHWG to complete the document. The final report is anticipated to be released in early 2017.

### **Focus Area #3: Innovative Use of Resources and Strategies**

As the financial costs required to produce affordable housing continue to rise, it is increasingly important for governmental and non-governmental entities to maximize and leverage any public or private funds available at the local and federal levels, and to explore efficiencies in development and operations that contain or reduce costs. Any efforts to expand the availability and creation of affordable units with accessible design or innovative energy efficiency cost saving features may also present additional costs. This section will detail some of the ways these costs savings are currently being addressed through various programs and initiatives and highlight state and local activities and initiatives that may assist in keeping to meet Illinois' affordable housing needs in these areas.

Additionally, the Illinois Housing Task Force proposes that in the coming year future meetings and discussions be held to generate research and data on the need, use and cost of the areas outlined in the focus area. This information will help guide future strategies and action items for this Focus Area.

The **Innovative Use of Resources and Strategies Focus Area** also draws from existing and new actions and strategies that are identified in this report's **Technical Plan**, which lays out the long-term planning goals of the Housing Task Force. In this Focus Area, three updated Technical Plan strategies provided the framework for the current programs and recommended efforts included in this section. These strategies, and their accompanying action items, are listed in the following pages.

## Recommended Technical Plan Strategies and Action Items

Strategies	Action Items	Partners	Principles (s) *
Encourage affordable housing developers to incorporate appropriate energy efficient systems and materials into their projects.	Research the true cost of energy efficiency and green building efforts in reducing operating costs as well as funding coordination opportunities to promote green incentives for affordable housing throughout the state.	IHDA, Housing Task Force, DCEO, IHC	AC
	Inventory all existing federal, state, non-profit and private energy conservation resources and promote coordinated funding structure with IHDA and other housing development programs (e.g. exploration of increased coordination between IHDA financed projects and DCEO Low Income Energy Efficient Residential Retrofit Program).	IHDA, DCEO, State Agencies, ICC	L
	Build upon existing relationships and outside expertise towards a goal of developing/improving IHDA energy efficiency standards and a series of benchmarks which will acknowledge best practices developed by the Housing Task Force.	IHDA, Housing Task Force, DCEO, Other State Agencies	L
	Whenever possible, consider incorporating successful cost-effective existing energy innovations that go beyond the scope of normal energy efficiency programs into lending practices for rental development (e.g. performance based contracting, and alternate energy sources, eg. geothermal heating, solar applications, et.al.,).	IHDA, DCEO, Developers	AC
Explore innovative solutions to address the rising costs in developing affordable housing.	Compile and conduct internal and external research on cost containment strategies for affordable housing, including but not limited to site acquisition costs, governmental regulations, financing, and energy efficiency considerations.	IHDA, Housing Task Force	L
	Use existing underwriting models and test cost containment strategies to determine their appropriateness as well as possible consequences.	IHDA, Housing Task Force	L
	Continue to encourage statewide cost containment strategies in housing development through the LIHTC Qualified Allocation Plan application process.	IHDA, Developers	L
	Explore options to reduce operating costs for existing and future affordable housing.	IHDA, IHC	AC
* Creation and Preservation (CP), Affordability and Choice (AC), Leadership (L)			

## Recommended Technical Plan Strategies and Action Items - Continued

Strategies	Action Items	Partners	Principles (s) *
Enact an informed and strategic expansion of accessibility standards for all persons with disabilities and elderly/mobility impaired persons.	Improve the affordable housing referral network – including but not limited to improvements to the Statewide Housing Locator, which will better connect persons with accessibility needs to available, affordable, and accessible housing.	IHDA, IDHFS, IDHS, IDoA	L
	Investigate available options and policies to promote increased occupancy of existing accessible units in all assisted housing by persons with accessibility needs.	IHDA, IDHFS, IDHS, IDoA	AC/L/CP
	Conduct research on the true costs of producing affordable units with universal housing design.	IHDA, Housing Task Force	L/CP
	Cultivate a richer understanding of the need and demand for and use of units with accessible design features.	IHDA, Housing Task Force	L
	Continue to encourage the inclusion of universal design principles in affordable units through the Qualified Action Plan (QAP) application process.	IHDA	AC/CP
* Creation and Preservation (CP), Affordability and Choice (AC), Leadership (L)			

## Sustainable Building and Green Investment

### Illinois Energy Efficient Affordable Housing Construction Program (EEAHCP)

The Illinois Energy Efficient Affordable Housing Construction Program, which is funded by the Energy Efficiency Portfolio Standards fund (EEPs), provides \$5 million annually in grants to non-profit and for-profit affordable housing developers to help offset the cost of incorporating energy efficient building practices in residential construction. Administered by the Illinois Department of Commerce and Economic Opportunity (DCEO), the goal of the program is to promote the benefits of lower utility bills that can be achieved within energy-efficient buildings. Eligible projects must be targeted at households that are at or below 80% of the area median income.

The program provides up to \$4,150 per unit for new housing developments and up to \$4,650 per unit in rehab housing developments. The program results in energy savings over 15% above the energy code. Through this program, grant funding has provided the necessary incremental costs to enable several thousand low and moderate-income families the ability to reside in super-efficient structures, saving significant energy resources and utility costs. Since the program's inception in 1988, 4,287 units have been rehabilitated, 7,266 units of new multi-family housing have been constructed and nearly 1,900 new single-family homes have been completed.

Eligible costs include incremental costs of approved energy efficiency improvements such as increased levels of insulation, high efficiency heating equipment and improved measures for reducing air infiltration.

This program is accepting applications until April 14, 2017.

### Residential Retrofit Program

The Residential Retrofit Program provides funding to leverage existing low income weatherization and home improvement programs to maximize electricity savings. As lead administrator, DCEO has partnered with program implementers such as state agencies, local government, lending institutions, housing authorities and affordable housing developers for direct installation or funding of electric efficiency measures in low-income households. The Residential Retrofit Program is funded through the EEPS fund and receives approximately \$10 million annually. Another \$4.5 million is transferred to the DCEO's Weatherization Assistance Program for the same purposes.

### Efficient Living: Illinois Public Housing Authority Energy Program

The Efficient Living: Illinois Public Housing Authority Energy Program provides funding for electric and gas efficiency measures in buildings owned and managed by Public Housing Authorities to reduce energy consumption and utility costs while maintaining affordable, comfortable homes for residents. The program receives approximately \$9 million annually from the EEPS fund.

The Efficient Living: Illinois Public Housing Authority Energy Program targets renters with incomes below 80% area median income. To date, 67% of the recipients are extremely low- to low-income households and 72% are elderly or disabled who occupy 8,606 of 11,640 units in 96 public housing buildings across the state that had energy efficiency measures installed. Supported by the EEPS fund, almost \$13 million has been awarded since 2010, helping install 97,965 energy cost reduction measures, saving more than 15.6 million kWh, 676,560 therms and 33 million gallons of water.

### Illinois Low Income Home Energy Assistance Program (LIHEAP)

The Illinois Low Income Home Energy Assistance Program (LIHEAP) is designed to assist eligible low income households pay for winter energy services. LIHEAP will provide a one-time benefit to eligible households to be used for energy bills. The amount of payment is determined by income, household size, fuel type and geographic location.



LIHEAP is funded by the U.S. Department of Health and Human Services and the State of Illinois and administered by DCEO. Energy Assistance is provided through local community action agencies or not-for-profit agencies throughout the state.

### **Home Weatherization Assistance Program**

The Illinois Home Weatherization Assistance Program (IHWAP) is designed to help low-income residents save on heating and curb costs while increasing the comfort of their homes. Its mission is to insulate the dwellings of low-income persons; particularly the elderly, persons with disabilities, families with children, high residential energy users and households with a high-energy burden, in order to conserve needed energy and to aid those persons least able to afford higher utility costs.

### **Qualified Allocation Plan: 2016-2017**

IHDA has a Qualified Allocation Plan (QAP), which is used to allocate federal Low-Income Housing Tax Credits. Projects earn more points under the 2016-2017 QAP if they integrate green features. Specifically, incentives are provided for projects that who meet the minimum IHDA standards for architectural planning and construction indicated for energy efficiency and green criteria, certification through Living Building Challenge, alternative certification for a high-performance building achieving 'Net Zero Capable' status as approved by the Authority. Incentives are also provided for commitments to obtaining sustainable certifications from U.S. Green Building Council LEED, Enterprise Green Communities 2015 or ICC 700 National Green Building Standard certification.

### **Cost Containment**

#### **Proposed Research**

Additional research is needed to examine cost containment strategies for affordable housing development which has successfully been applied in other geographic areas of the country.

#### **Low Income Housing Tax Credit Qualified Allocation Plan Under the State of Illinois (LIHTC-QAP)**

The QAP includes a Cost Containment category which provides incentives to affordable housing developments with the lowest construction costs in their projects set aside. Up to four points can be earned in the Cost Containment category, which assist the project in obtaining tax credits. Only projects with costs below the grand total hard cost limits as set forth in the Mandatory Section of the QAP are eligible for consideration.

Projects are ranked within each geographic Set-Aside in four categories:

- total hard construction costs;
- total hard construction costs per unit;
- total hard construction costs per square foot; and
- building efficiency (equal to the rentable residential square footage divided by the total Project square footage).

While IHDA sees the QAP as an effective and important tool in addressing cost containment, it is clear more needs to be done to address the rising costs of housing construction. IHDA and members of the Housing Task will continue to explore other cost saving measures, including innovative approaches in the public and private sectors.

## Accessible Design

### Home Accessibility Program

Funded by the Illinois Affordable Housing Trust Fund, the Home Accessibility Program (HAP) provides grants to units of local government and community based organizations throughout the state to provide home accessibility funding to prevent premature or unnecessary institutionalization of the elderly and persons with disabilities. The funding will allow homeowners or tenants to remain in their homes by improving accessibility and safety.

The HAP Round 1 allocation is \$3 million (\$1 million in Cook, Will, DuPage, Kane, Lake, and McHenry Counties and \$2 million for the rest of the state). Recommended participants are expected to be presented to the IHDA Board on December 16, 2016 for approval. Staff is recommending funding to 15 units of local government and community based organizations to assist an estimated 163 households.

Funding to income qualified households will be provided as a 5-year forgivable loan (\$25,000 in Cook and collar counties and \$15,000 for the rest of the state). The accessibility modification must meet all local, state, and federal laws.

### Rural Development Home Repair Loan and Grant Programs - Section 504

The U.S. Department of Agriculture Rural Development office administers the Rural Development Home Repair Loan and Grant Program, known as the Section 504 program, to provide emergency repair assistance to individuals who live in rural areas with a population fewer than 10,000. This program provides low-interest loans to income eligible homeowners of all ages, and grants to individuals over age 62 who meet specified income criteria, to assist with home repairs and making homes accessible for people with disabilities and mobility impairments.

### Specially Adapted Housing Grant for Veterans

The Illinois Department of Veterans' Affairs (IDVA) operates the Specially Adapted Housing Grant, which is a benefit available to veterans or service members who are entitled to disability compensation for permanent and total service-connected disability due to:

1. The loss, or loss of use, of both lower extremities such as to preclude locomotion without the aid of braces, crutches, canes or a wheelchair.
2. Blindness in both eyes having only light perception, plus loss or loss of use of one lower extremity.
3. The loss, or loss of use, of one lower extremity together with residuals of organic disease or injury, or the loss or loss of use of one upper extremity.
4. The loss, or loss of use, of both upper extremities, so as to preclude use of the arms at or above the elbows.
5. The permanent and total disability is due to a severe burn injury (as so determined).

Funded through the Illinois Affordable Housing Trust Fund, eligible veterans or service members may receive an IDVA grant not more than 50 percent of the cost of a specially adapted house, up to the aggregate maximum amount allowable by law. The current maximum grant amount allowable is currently \$63,780. IDVA projects committing \$223,000 to the program in 2017.

### The Illinois Assistive Technology (AT) Loan Program

The Illinois Assistive Technology Program (IATP) is a statewide, non-profit agency funded under the Technology-Related Assistance for Individuals with Disabilities Act of 1988. IATP's mission is to break down barriers that prevent people with disabilities from accessing the assistive technology.

The IATP AT Loan Program offers home modification loans to qualifying persons requesting accessible features. These loans are limited to a maximum of \$5,000 and can be used to make modifications that allow individuals to live more independently.

## **Focus Area #4: Leadership and Capacity Building**

As State and federal legislatures and budgets for specific programs change, coordination efforts between governmental and non-governmental entities are crucial to effectively implement streamlined affordable housing planning efforts and policies and to maintain adequate funding. Information below highlights local and state affordable housing planning efforts, as well as state and federal legislative changes.

The **Leadership and Capacity Building Focus Area** draws from actions and strategies that are identified in this report's **Technical Plan**, which lays out the long-term planning goals of the Housing Task Force. In this Focus Area, three Technical Plan strategies provided the framework for the current programs and recommended efforts included in this section. These strategies and their accompanying action items are listed on the following page.

## Recommended Technical Plan Strategies and Action Items

Strategies	Actions	Partners	Principle(s)*
Promote equal access to quality housing for the full diversity of Illinois households.	Undertake comprehensive planning for the State in the upcoming Assessment of Fair Housing (AFH), due in March of 2019. Coordinate efforts statewide with CDBG Entitlement grantees, PHAs, and regional efforts, including possible provisions of localized AFH data and information if/when available.	IHDA, DCEO, IDPH, IDHR, Municipalities, Counties, PHAs, IHC	AC
	Research and build best practices for the inclusion of persons with criminal records.	IHDA, IDHR, Non-profits	L
Track federal legislation.	Concentrate efforts on federal housing-related legislation which impacts existing and future resources, tax reform, and housing finance reform.	IHDA, IHC	L
	Track federal rule-making and provide public comments to streamline process and fully address affordable housing objectives.	IHDA/OHCS, HUD, Treasury, CMMS, CFPB, FHFA	L
Provide and expand affordable housing opportunities in rural Illinois.	Pending possible funding through the Attorney General's Office as well as consideration of other related efforts, IHDA proposes to coordinate/provide capacity-building efforts in rural communities and small cities outside of the Chicago metropolitan area which have indicated an interest in preserving and expanding their affordable housing stock and housing options for residents.	IHDA/CAAs/Regional Planning Commissions/PHAs/IIRA/ University of Illinois/Other	L
Generate ideas and strategies for the improvement of the Housing Task Force's Housing Plans.	Assess the current Housing Plan development process for the Housing Task Force to determine possible improvements in the documentation, presentation, and effectiveness of the Annual Comprehensive Housing Plan and Annual Progress Report.	IHDA, HTF	L
* Creation and Preservation (CP), Affordability and Choice (AC), Leadership (L)			

## Leadership and Capacity Building

### Affordable Housing Planning and Appeal Act

The Affordable Housing Planning and Appeal Act (AHPAA) encourages affordable housing production in communities (municipalities with populations over 1,000, and counties) throughout the state by requiring communities with less than 10% affordable housing stock (known as 'non-exempt' communities) to participate in activities that promote affordable housing within their jurisdiction. Non-exempt communities are required to produce and approve an affordable housing plan 18 months after the date of notification of their non-exempt status. While there are no major enforcement processes in this law, it codified the state's intent in providing affordable housing.

The AHPAA also established the State Housing Appeals Board (SHAB), appointed by the Governor, which is responsible for hearing appeals received from developers who feel that one of their development proposals had been unfairly denied, or unreasonable conditions were placed upon the tentative approval of the development to make it economically infeasible to carry out, by a non-exempt local government.

IHDA, as the administering agency of the AHPAA, plans to produce the non-exempt local communities list every five years. Its most recent update was conducted in December 2013 through the use of the U.S. Census's American Community Survey (ACS). Sixty-eight new non-exempt municipalities were identified, and on December 16, 2013 an informational workshop was held to provide these municipalities with information concerning financial and technical assistance resources, affordable housing plan requirements, and to review data sources and calculation processes.

Technical assistance is available from IHDA and partnering organizations (Business and Professional People for the Public Interest (BPI), Metropolitan Mayors Caucus, Chicago Metropolitan Agency for Planning (CMAP), and Metropolitan Planning Council (MPC)) on an ongoing basis. Affordable housing plans were due to IHDA by June 2, 2015. As of December 2016, IHDA has received 33 affordable housing plans. IHDA continues to provide direct technical assistance to municipalities throughout the state as requested, as municipalities continue to work to complete, submit, and implement their affordable housing plans.

### "Downstate" and Rural Capacity-Building

IHDA will continue to pursue funding and other technical assistance efforts to carry out capacity-building efforts in rural communities and small cities located outside of the Chicago metropolitan area which have an interest in preserving and expanding their affordable housing stock and options. These efforts include the following:

- Continue to pursue a capacity-building program primarily through a grant from the Illinois Office of Attorney General's National Foreclosure Settlement Program to develop a targeted technical assistance program for rural communities and small cities. IHDA would work to identify potential partners in implementing this program, which may include community action agencies, universities, housing authorities, and other interested organizations. This strategy would consider a regional approach to build upon local resources and maximize such partnerships. Building and providing technical knowledge of affordable housing development through tailored training programs would be considered.
- Work with organizations such as University of Illinois-Extension to explore automated alternatives to traditional training, including its webinar series for local government officials.
- Develop an internal technical assistance program to assist local governments in developing viable community revitalization plans, to better identify local needs and resources as well as to better compete for funding resources, especially Low-Income Housing Tax Credit projects.

### Social Impact Bonds/Pay for Success

Pay for Success (PFS), also known as social impact bonds, is a model for financing services that can attract additional, non-traditional sources of funding with an approach to contracting that ties payment for service delivery to the achievement of measurable outcomes. Most PFS models in the United States are in demonstration stages, but successful examples in European settings suggest PFS may be a valuable tool for addressing financial obstacles to permanent supportive housing.

PFS initiatives can be devised to address pinpointed population needs where costs incurred by the target population can be controlled through supportive housing, and could be scaled to serve more people in the future through systematic change.

In a typical PFS contract, money for services is provided by the investors, and the government then pays the investors if the service providers achieve their agreed upon results. Typically, an independent evaluator determines whether the agreed-upon outcomes have been met. Many PFS models utilize a multi-year forecast of budgeting and cost savings/shifting for current business versus the new way of delivering services.

IHDA plans to explore the costs and benefits of PFS/social impact bonds, especially regarding supportive housing. It plans to work with other State agencies, non-profits (e.g. CSH), and other groups to research its feasibility.

### **Affirmatively Furthering Fair Housing (AFFH)**

In July 2015, HUD released the final rule implementing the Fair Housing Act of 1968's obligation for HUD grantees, PHAs, and funding recipients to affirmatively further fair housing. The Fair Housing Act not only makes it unlawful for jurisdictions to discriminate, the law also requires jurisdictions to take actions that can undo historic patterns of segregation and other types of discrimination, as well as to take actions to promote fair housing choice and to foster inclusive communities. The rule establishes basic parameters to help guide public sector housing, community development planning and investment decisions. The rule encourages a more engaged and data-driven approach to assessing fair housing and planning actions. The rule also establishes a standardized fair housing assessment and planning process to give jurisdictions and PHAs a more effective means to affirmatively further fair housing for the purposes of the Fair Housing Act.

The HUD rule provides detail for the first time what its requirements are for HUD grantees, PHAs, and funding recipients to affirmatively further fair housing, a certification signed annually by all HUD grantees. The rule not only clarifies what actions were considered acceptable, but also clarifies when the old Analysis of Fair Housing Impediments (AFHI) is due. Now to be known as the Assessment of Fair Housing (AFH), it is to be tied to the Five-Year Consolidated Plan. PHAs for the first time are required to develop their own individual plans, or can become part of their jurisdiction's AFH. For the majority of PHAs, that would be the State's HFA, and would be generally coordinated by IHDA. The new rule also discusses disparate impact, deconcentrating poverty, and opportunity areas, but states very little about persons with disabilities, a growing area of concern within the realm of fair housing issues.

Most program participants will not be required to use the new AFFH system until 2020 or after. CDBG Entitlement jurisdictions receiving more than \$500,000 and that are required to have a new Five-Year Consolidated Plan on or after January 1, 2017 will be the first that must submit an initial AFH. On October 27 2016, IHDA submitted comments to HUD for their 30-day public notice on the AFFH State Assessment Tool, which participating designees will rely on when completing their AFH. As IHDA's next Five-Year Consolidated Plan (2020-2024) will be due in November of 2019, the first State AFH will be due in March of that year.

IHDA has been preparing for HUD's eventual publication of the AFFH rule by taking on related actions outside the rule itself. IHDA views these measures as representative of good policy and plans to continue these activities into the future:

1. **Opportunity Areas** (discussed in full in the 2016 Annual Comprehensive Housing Plan) – IHDA has determined Opportunity Areas based on poverty level and other indicators measuring access to jobs. Opportunity Areas are updated annually and IHDA has maintained an open-door policy on incorporation of data sets that best represent the State of Illinois. Opportunity Areas and Proximate Opportunity Areas – areas in close proximity with demonstrable connection – are currently incentivized in the QAP with 10 points.

IHDA is currently researching the possibility of changing to an Opportunity Index that would incorporate additional factors into the Opportunity measurement (i.e. education, environmental health, etc.). This index would be circulated for public comment and discussion before adoption by IHDA. All Opportunity

Area related research and material is published here: <https://www.ihda.org/developers/market-research/opportunity-areas/>.

2. **Community Revitalization Planning** – in 2016, IHDA added an enhanced scoring criteria to the QAP (equal to up to 10 points) for quality community revitalization planning efforts that demonstrate affordable housing development as part of a concerted effort to increase opportunity within a community. This effort expands the standard requirements for the content of community revitalization plans, especially those involving a project proposed in a Qualified Census Tract (QCT), to include economic revitalization efforts and other localized efforts. IHDA worked with a variety of partners (MPC, Enterprise, etc.) to develop its initial set of plan review criteria and will continue to grow this effort in future QAPs. Additionally, IHDA has hired a Community Revitalization Specialist to provide and coordinate technical assistance throughout the state as well as oversee the community revitalization scoring efforts.
3. **Concentration and Preservation Metrics** – IHDA has incorporated different market metrics into its review of Preliminary Project Assessments (PPAs) and LIHTC applications since 2012. In the last year, IHDA has formalized the Affordable Rental Unit Survey (currently mapped and published here: <https://www.ihda.org/developers/market-research/affordable-rental-unit-survey/>) which serves as an estimator of rental affordability (independent of rent restrictions) for each census tract throughout the state. Additionally, IHDA published and maintains an Affordability Risk Index, a tool that is designed to read the need to preserve affordability by measuring change over time in key market metrics. A full discussion of the risk index is provided here: <https://www.ihda.org/developers/market-research/affordability-risk-index/>.
4. **Additional QAP Changes** – IHDA's 2016-2017 QAP include several updates to make it more responsive to State actions which affirmatively further fair housing. These included:
  - a. Improving the Enhancing Accessibility point category to include language on IHDA's use of the ICC's Universal Housing Design standards as part of its building standards; (also mandating a higher 10%/2% accessibility standard for all projects);
  - b. Highlighting requirements to applicants for action steps in Affirmative Fair Housing Marketing Plans (AFHMPs) to evidence outreach efforts to reach "those groups least likely to apply;"
  - c. Continuing to have the AHPAA Set-Aside, including updated lists of non-exempt as well as "at-risk" communities (i.e., those with 20% or less affordable housing share);
  - d. Continuing the point category for a 10-20% set-aside for supportive housing populations, those being defined as persons with disabilities (a protected class) and/or homeless and at-risk persons and families;
  - e. Requesting local government support, but eliminating any mandated documents. Use of local approval, Consolidated Plan Consistency Certifications, and local HOME/CDBG funding as ways to positively reward applicants;
  - f. Retaining income targeting;
  - g. Retaining and expanding allowable sources of all federal and state rental assistance; and
  - h. Establishing an allowable 3 percent Developer Fee for a Rental/Operating Reserve.

**Proposed actions outside of IHDA include:**

1. Coordinate technical assistance with IDHS to identify and work with PHAs interested in participating in the remedial preferencing policy for persons with disabilities, which was approved by HUD (for Illinois PHAs);
2. Assist DCEO in establishing AFFH actions which can be carried out by units of general local government (UGLGs), the CDAP-eligible grantees, including passage and enforcement of fair housing ordinances;
3. Work with IDHS-DMH to continue implementation of the Bridge Rental Subsidy Program, a rental assistance program for persons with mental illness who are moving from institutions into community-based housing;
4. Develop ways to encourage use of the Property Tax Abatement Opportunity Act by PHAs and developers to encourage landlord participation in the HCV Program with rental properties in opportunity areas, through administering PHAs; and

5. Work with the Metropolitan Planning Council (MPC) to better utilize its usage of opportunity areas for both the Regional Housing Initiative (RHI) and CRHCI (vouchers) Programs.
6. Work with Illinois Department of Human Rights to provide training to PHAs on HUD's new Equal Access Rule and the State Human Rights Act.

### **Economic Impact Analysis/IHDA Economic Impact Report**

For each State Fiscal Year, IHDA's Department of Strategic Planning and Research (SPAR) produces an Economic Impact Report to assess the economic impact of new housing and rehabilitation construction generated through the Authority's various single and multifamily housing programs. These reports date back to 1981 and include data on the Authority's new construction and housing rehabilitation activities, and homeownership assistance under its various housing programs to measure the expected impact of this activity on employment, local business income and wages, and taxes.

IHDA finalized its 2016 Economic Impact Report in November of 2016. For FY2016, IHDA's single and multifamily programs helped to create an estimated 4,364 full-time jobs in construction and construction-related industries. The Authority's activity in FY2016 also generated nearly \$376 million in federal, state and local taxes and fees, as well as local business income and wages. This, with the addition of a return of \$109 million federal tax dollars to the State, demonstrates that the Authority is a major contributor to the economic and financial health of Illinois. Please note that the economic impact reported in the FY2016 report represents a significant decrease over the previous year. This decrease was due to extremely strong homeownership production in FY2015 that was unprecedented in any state or in IHDA's history. While IHDA's mortgage programs remain robust, it is believed that the extreme production of FY2015 is not replicable and that the production figures have normalized in FY2016. Future economic impact reports will therefore show a smaller economic impact than the FY2015 report.



## State Legislation

### Illinois Comprehensive Housing Planning Act

The Illinois Comprehensive Housing Planning Act (P.A. 94-965) established a statewide comprehensive housing initiative, identifying underserved "priority populations" (page 5), and calling for the appointment of a Housing Task Force to improve the planning and coordination of the State's housing resources. The Housing Task Force is made up of 44 representatives from State agencies and the housing community. Each year the Annual Comprehensive Housing Plan identifies statewide focus areas that guide the state's activities related to affordable housing planning and development for the year. Each plan also includes an identification of funding sources for which the state has administrative control that are available for housing construction, rehabilitation, preservation, operating or rental subsidies, and supportive services.

The Act, was set to expire on June 30, 2016, but was extended (as amended by P.A. 99-0564) by Governor Rauner through December 31, 2026. The amended legislation included various changes to the original Act, which allow the Housing Task Force to better serve underserved populations, and assist in the development of the Annual Comprehensive Housing Plan and Annual Progress Report. These include the official addition of three new State agencies to the Interagency Committee, (Illinois Emergency Management Agency, Illinois Department of Corrections, and the Illinois Department of Juvenile Justice), as well as two new priority populations: Low-income people residing in communities with ongoing community revitalization efforts, and other special needs populations, including people with criminal records and veterans experiencing or at risk of homelessness.

### Illinois Affordable Housing Tax Credit (SB2921-Amended)

The Illinois Affordable Housing Tax Credit (IAHTC) Program, also known as the State Donation Tax Credit, encourages private investment in affordable housing by providing donors to qualified non-profit affordable housing sponsors with a tax credit on their Illinois income tax equal to 50% of the donation. The Illinois Affordable Housing Tax Credit began in 2001 as a key leverage to fund quality affordable housing throughout Illinois. While the program was scheduled to expire in 2016, the renewal passed both chambers in the 99<sup>th</sup> Illinois General Assembly and was signed into law by the Governor Rauner in December of 2016 (P.A. 99-0915). This bill extended the program through December 21, 2021.

Since its passage in 2001, the Illinois Affordable Housing Tax Credit has been a successful tool in developing affordable housing:

- Motivated the donation of \$360 million in assets like land, buildings, and long-term leases from private sources to affordable housing development in Illinois.
- Provided key financing for property-tax paying developments representing over \$3.3 billion invested in 51 of 59 Illinois State Senate Districts.
- Preserved or created over 17,000 homes for seniors, families, veterans and people with disabilities in communities across Illinois.
- Supported more than 25,000 jobs with over \$1 billion in wages and business income.

IHDA administers the IAHTC program statewide. The City of Chicago's Department of Housing administers the program in the City of Chicago. Each agency reviews applications submitted by sponsors and provides a reservation of IAHTCs to successful applicants.

## Federal Legislation

As the current Congress closes after year's end, any legislation not approved by both the House and Senate will have to be re-introduced in 2017 for further consideration. As such, this Plan does not provide extensive reviews of pending legislation that was in play during the last session. Instead, a general update is being provided in this area.

## Appropriations

It is anticipated that Congress will pass a second Continuing Resolution (CR) extending the timeframe to as late as April 28, 2017, and it is anticipated that it will use the Bipartisan Budget Act FFY 2017 spending caps, which are lower than FFY 2016's. This will likely mean funding reductions in certain programs, such as rental assistance. An omnibus budget bill is anticipated in April of 2017. Please note that this is regarding the current FFY (2017) budget. There is also the possibility that this or next year's budget may include reconciliation language regarding tax reform.

The traditional submittal timeframe for next year's budget (FFY 2018) will be delayed to provide ample time for the Trump Administration to prepare its first full budget. Besides consideration of the debt ceiling, discussions are also expected on a possible infrastructure bill. Affordable housing advocates, including State HFAs, are hoping to have housing included as part of that infrastructure discussion.

## Tax Legislation

Legislation in the current outgoing Congress (S.2962 and S.3237) known as the Cantwell-Hatch bills would have provided a 50% increase in the per-capita amount that would be used to calculate annual state credit allocations, as well as other technical improvements, including making the rate floor of the 4% acquisition credit permanent and allowance of income averaging. One of these bills only includes the credit increase language. It is anticipated that one or both of these bills will be reintroduced in the new Congress in early 2017. It is also possible that some of the Cantwell-Hatch bills' provisions may be "peeled off" and included into a larger tax reform bill.

The larger issue of tax reform is also being actively discussed for 2017. House Ways and Means Committee Chairman Kevin Brady has supported the House Speaker Paul Ryan's blueprint, "A Better Way", which provides for a reduction to the corporate tax cap to 20%. The Trump Administration has discussed a deeper reduction to 15%. There is not currently a similar plan in the Senate, although Senator Hatch is working on one. As stated earlier, tax reform could become part of the budget reconciliation process, most likely in the Senate. Both LIHTCs and private activity bonds may be included in any major tax reform effort. Even if not directly addressed, lower tax rates would lower the need for corporations to offset their tax liability, so this may impact the equity market via reduced investor interest.

## Housing Finance Reform

There were four major bills (two in the House and two in the Senate) last session proposing reform of the government-sponsored enterprises (GSEs). There has been mention of removing Fannie Mae and Freddie Mac completely from under government control. Other proposals have called for a single entity to provide an insurance/guarantee backstop. Any major changes in this area may also impact the recently-funded National Housing Trust Fund, as it is a non-appropriated funding source originating from the business portfolios of Fannie Mae and Freddie Mac. It should be noted that 2016 was the first year of funding for this program, which is being allocated through HUD directly to states.

## Regulatory Issues

There are a few areas in play currently, per the following:

IHDA provided public comments on HUD's proposed rule for the Assessment of Fair Housing-State Assessment Tool on October 27, 2016. HUD is expected to issue its final rule in early 2017. It will define what data must be used and coverage in the States' upcoming Assessments of Fair Housing.

HUD is also expected to issue additional proposed rules to implement various provisions of the Housing Opportunities Through Modernization Act ("HOTMA"), passed into law in 2016. One of these major areas is to provide more flexibility to PHAs regarding project-based vouchers, including a change allowing up to 20% of a PHA's voucher allocation (instead of budget authority) to be project-based, which is expected to allow more rental assistance to be available for this usage. There is also a provision to allow project-basing of up to 30% for units targeting homeless individuals and families, veterans, elderly households, disabled households, or units in areas where vouchers are difficult to use. As IHDA encourages leveraging with rental assistance under its LIHTC

Program to assist these populations, this could provide major benefits in further accessing this resource, especially for supportive housing.

There may also be major Treasury Department rule changes on both Dodd-Frank (financial institutions reform), as well as on depreciation and losses. The latter could potentially have complex impacts/effects on yields to investors, such as under the LIHTC Program.

There are certainly other areas that will be impacted over the coming year, with an eye toward deregulation. These will be reported on as is appropriate in subsequent progress reports and future plan developments.

## 2017 Housing Production Plan Recommendations

The Housing Production Plan recommends how the State will invest its resources for additional housing for Illinois families and individuals. Housing Production Plans are required by the Comprehensive Housing Planning Act as they set funding goals to serve the needs of the identified Priority Populations.

Every effort is made to present a complete and reliable list of resources and expected availability of resources in the Housing Production Plans. Over the years of Comprehensive Housing Planning, it has become clear that it is often difficult to present wholly accurate information in the annual Housing Production Plan. One of the main reasons for this is that the very nature of affordable housing financing requires flexibility. Many of the resources commonly accessed are subject to changes, delays, annual fluctuation in amounts, and in some cases, absorption or re-appropriations.

The amounts listed for each funding source are to be considered Estimates or Expected Amounts to be made available in Calendar Year 2017. Should any major changes be made to the funding listed in the Housing Production Plans or should any new or unanticipated resources become available in CY 2017, details on these programs will be included in future Comprehensive Housing Plan reports.

## 2017 Housing Production Plan

The following Housing Production Plans show each housing program under State of Illinois administration with estimates for Calendar Year 2017 fund availability. Estimates for 2017 multi-family unit production were calculated by an average statewide per unit cost determined by an analysis of the most recent data available in IHDA's unit inventory database. This analysis takes into account the varying range of costs associated with geographic region, unit type, and development type (rehab vs. new construction). The 2017 estimates for households assisted in the single family production chart were provided as 2017 estimates by the administering agency of each program. Unit distributions for each priority population in both charts were determined using historical data from previous ACHP Annual Progress Reports.

These production charts show two major factors: the historical funding breakdown of these priority populations, and ongoing policies and goals to encourage a higher percentage of supportive housing. Please also keep in mind that much of the PSH units being produced are LIHTC 10% set-aside (Statewide Referral Network) housing units, which are part of larger family or elderly housing developments.

LIHTC and Illinois State Donation Tax Credits as issued do not represent an actual monetary amount or capital investment for the actual development until the tax credits are sold (syndicated) to a willing buyer. This syndication process generates cash equity which is then generally used to fund the development. When associated with either of the tax credit programs, dollar amounts are currently estimated at 95 cents to the dollar. The LIHTC program equity amount is also multiplied by ten (the numbers of years those tax credits are available) to calculate the total amount of equity produced.

## 2017 Housing Production Plan – Multi Family Programs

2017 Multi Family Housing Production Plan		
Agency and Program	Source	2017 Estimated Funds Budgeted
<b>IHDA Administered:</b>		
Low Income Housing Tax Credit (9%)	Federal Credits	\$ 23,000,000
	Equity Raised	\$ 218,500,000
Low Income Housing Tax Credit (4%)	Federal Credits	
	Equity Raised	\$ 58,725,000
Illinois State Donation Tax Credit (IAHTC)	Donation Amount	\$ 40,809,360
	Tax Credit Allocation	\$ 20,404,680
HOME	Federal	\$ 11,500,000
Illinois Affordable Housing Trust Fund	State	\$ 35,000,000
National Housing Trust Fund (NHTF)	FHFA/HUD	\$ 4,000,000
Tax Exempt Bonds	Federal	\$ 200,000,000
Taxable Bonds	Private	\$ 50,000,000
Affordable Advantage Mortgage	Federal	\$ 10,000,000
Credit Advantage Mortgage	Federal	\$ 50,000,000
IHDA/HUD Federal Financing Bank/US Treasury Mortgage	Federal	\$ 125,000,000
<b>DCEO Administered:</b>		
Illinois Energy Efficiency Affordable Housing Construction Program	State	\$ 5,000,000
Illinois Public Housing Authority Energy Program	State	\$ 9,000,000
<b>IDVA Administered:</b>		
Adaptive Housing Program for Veterans	State/AHTF	\$ 223,000
<b>TOTALS</b>		<b>\$ 797,352,680</b>
<b>TOTAL NUMBER OF UNITS PRODUCED at \$235,483/UNIT</b>		<b>3,386</b>

Average Distribution of Units Produced by Priority Population, 2012-2015		
Priority Populations	Estimated Unit Distribution	Estimated Number of Units
Low Income Families	45%	1,524
Senior	30%	1,016
Supportive Housing	25%	847
<b>TOTAL</b>	<b>100%</b>	<b>3,386</b>

## 2017 Housing Production Plan – Single Family Programs

2017 Single Family Housing Production Plan		
Agency and Program	Source	2017 Estimated Funds Budgeted
<b>IHDA Administered:</b>		
1stHomeIllinois	Federal	\$ 600,000,000
Illinois Affordable Housing Trust Fund	State	\$ 10,000,000
I-Refi	Federal	\$ 130,000,000
Mortgage Credit Certificate	Federal/State	\$ 25,000,000
Hardest Hit Fund	Federal	\$ 125,000,000
(@)HomeIllinois	Federal/State	\$ 220,000,000
<b>DCEO Administered:</b>		
Residential Retrofit Program	State	\$ 14,500,000
CDBG Housing Rehabilitation	Federal	\$ 6,750,000
Illinois Home Weatherization Assistance Program	Federal/State	\$ 42,459,348
<b>TOTALS</b>		<b>\$ 1,173,709,348</b>
<b>ESTIMATED TOTAL NUMBER OF HOUSEHOLDS ASSISTED</b>		<b>21,233</b>

Average Distribution of Households Assisted by Priority Population, 2012-2015		
Priority Populations	Estimated Unit Distribution	Estimated Number of Units
Low Income Families	60%	12,740
Senior	30%	6,370
Supportive Housing	10%	2,123
<b>TOTAL</b>	<b>100%</b>	<b>21,233</b>

## Residential Services Programs

In addition to developing and rehabilitating affordable housing, the State of Illinois provides housing- related assistance and services to the Priority Populations through a variety of state agencies and programs. The following Residential Services Programs table identifies many of the State's efforts to provide services to the Priority Populations in 2017. The funds identified on this table do not include all service resources, but focus on those that relate directly to housing. It is important to note that the programs listed below are not necessarily tied to units assisted via multi-family and single-family production efforts. Therefore, in progress reporting, the population and number of persons or households served through each funding source will be considered individually and reported as accurately as possible, but the total households or individuals assisted will not represent all new clients.



## Residential Services Chart – 2017 Housing Production Plan

Residential Services Programs / 2017 Housing Production Plan,				
Program	Source	Estimated Budgeted Funds	Priority Population	Estimated Number Assisted
<b>DCEO Administered:</b>				
Low Income Home Energy Assistance Program (LIHEAP)	<b>Federal/State</b>	\$178,000,000	Low Income Families, Seniors, Special Needs	271,000 households
<b>DCFS Administered:</b>				
Norman Housing Advocacy	<b>GRF</b>	\$900,000	Low Income Families; Homeless	3,300 Families
Norman Cash Assistance Program	<b>GRF</b>	\$2,800,000		
Youth Housing Advocacy	<b>Federal</b>	\$200,000	Homeless	300 Youth
Youth Cash Assistance	<b>Federal</b>	\$170,000		
<b>IDHFS Administered:</b>				
Supportive Living Program	<b>GRF</b>	\$138,000,000	Homeless; Special Needs	11496 individuals
<b>IDHS Administered:</b>				
Emergency and Transitional Housing	<b>GRF/AHTF</b>	\$8,900,000	Homeless	40,000 Individuals
Homeless Prevention Program	<b>GRF/AHTF</b>	\$4,000,000	Homeless	6,750 Individuals
Supportive Housing Program	<b>GRF/Medicaid Trust Fund</b>	\$7,382,500	Homeless; Special Needs	6,500 Individuals
Supportive Housing Program (Bridge Rental Subsidy)	<b>GRF</b>	\$15,000,000	Williams Consent Decree Populations	2,343 clients
Domestic Violence Program	<b>GRF</b>	\$21,814,589	Homeless	51,000 Individuals (adult & children)
Assistance to the Homeless Fund	<b>State</b>	\$300,000	Homeless	63 shelters
Homeless Youth Services Program	<b>GRF/AHTF</b>	\$5,335,000	Homeless	2,500 Youth and 500 of their accompanying children
Emergency Solutions Grant	<b>Federal</b>	\$4,713,992	Homeless	22,000 Individuals and/or Families

Residential Services Chart – 2017 Housing Production Plan – Continued

Residential Services Programs / 2017 Housing Production Plan, Continued				
Program	Source	Estimated Budgeted Funds	Priority Population	Estimated Number Assisted
<b>IDoA Administered:</b>				
Community Care Program	GRF	\$600,036,547	Low Income Seniors	54,900 individuals/monthly
Community Reinvestment Program	Human Services Commitment	\$180,150,520	Seniors	28,900 individuals/monthly
Colbert Bridge Rental Subsidy Initiative	GRF	\$11,900,545	Colbert Consent Decree Class Members Only	570 Individuals
<b>IDPH Administered:</b>				
Housing for Persons with AIDS/HIV	Federal	\$1,118,573	Low Income; Homeless; Special Needs	395 persons with AIDS/HIV and their families members
<b>IHDA Administered:</b>				
Abandoned Properties Program	State	\$15,000,000	NA	NA
Rental Housing Support Program	State	\$9,060,651	Low Income; Homeless; Special Needs; Seniors	1,000 Individuals
HUD Section 811 Project Rental Assistance	Federal	\$11,982,009	Low Income; Special Needs	370 Individuals
Blight Reduction Program	Federal	\$15,925,000	NA	NA
<b>IDVA Administered:</b>				
Prince Home Program for Veterans	Federal	\$825,100	Homeless; Special Needs	29 Individuals
<b>Residential Services Programs Totals:</b>		<b>\$1,233,515,026</b>		

## 2017 Technical Plan Recommendations

The Technical Plan contains the Housing Task Force's long term planning goals. Specific action items are suggested by Housing Task Force members, grouped in broader strategies and organized by Housing Principle (described in more detail below). The Technical Plan is updated on an annual basis (new action items are added and existing action items are modified as necessary). Each year active action items are selected by Housing Task Force members and used to guide the Focus Areas.

### Housing Principles:

#### **Affordability & Choice:**

Stable and affordable housing is a prerequisite to achievement of individual and family success. A full range of quality housing options – both single family and multi-family homes – available and accessible in communities throughout the State, is an essential part of meeting the needs of all income groups and special needs populations. Strategies employed to assure affordability and choice must promote equal access, create housing options in the least restrictive environments, prevent homelessness, support homeownership and rental options, and coordinate housing and services.

#### **Creation & Preservation:**

To ensure ongoing affordability, investment of public and private resources must be directed toward the preservation of existing housing and creation of new affordable housing assets. We seek to bring down the cost of development, reduce the ongoing cost of operations, and assure the development of a range of housing types.

#### **Leadership:**

Recognizing that housing is not just bricks and mortar but the foundation for personal achievement and community involvement, it is critical for policymakers at all levels of government and in all types of communities to guide and promote housing as fundamental to community and economic health. Leadership requires accountability through identifying priorities, setting goals for the use of resources that reflect these priorities, and reporting on production and preservation. Promoting housing includes ensuring that every area and group can fairly compete for resources, requiring focused training and technical assistance for communities and housing providers.

**ANNUAL COMPREHENSIVE HOUSING PLAN - TECHNICAL PLAN**

**Housing Principle: Affordability and Choice**

<b>STRATEGIES / ACTIONS</b>	<b>Agencies and Partners</b>	<b>2017 Status</b>
<b>Implementation of Affordable Housing Planning and Appeal Act</b>		
Identify data and administrative needs to issue a new determination of non-exempt communities under the AHPAA utilizing American Community Survey (ACS) Census Data - monitor and report on availability of needed census data sets.	IHDA, Interested Parties, Community Partners	Completed (continuing to implement AHPAA)
Complete drafting of administrative rules of operation for the fully appointed State Housing Appeals Board.	IHDA, Community Partners, Governor's Office	Completed, 2013
Continued outreach, presentations, and discussions with non-exempt and at-risk of non-exemption communities throughout Illinois.	IHDA, Community Partners	Ongoing
<b>Promote equal access to quality housing for the full diversity of Illinois households through education, enforcement, and equitable allocation procedures</b>		
Increase awareness of landlord-tenant rights and responsibilities through education programs and materials including information on fair housing.	IDHR, CIC, Property Owners	Ongoing
Recognize communities that have actively engaged in promoting diversity for housing, and anti-discrimination activities and challenge barriers to fair housing.	IDHR, Community Fair Housing Groups	Ongoing
Implement HUD's Affirmatively Furthering Fair Housing and Assessment Tool Rules through coordinated Assessments of Fair Housing. Assist local governments with generated data points.	IHDA, DCEO, IDPH, IDHR, Municipalities, Counties, PHAs Municipalities	Ongoing
Determine ways to assist IDHR.	IDHS, IHDA, IDHR, DCEO	Ongoing
Contingent on funding, implement rural/small city development capacity building program.	IHDA, OAG, Municipalities, Other Parties	Ongoing
<b>Expand access to housing for persons with disabilities transitioning from institutional settings to community-based housing</b>		
Seek improvements and funding opportunities to expand features of the Statewide Housing Locator.	IHDA, IDHFS, IDHS, IDoA	Ongoing
Train transition coordinators on the rights of persons with disabilities and resources under Fair Housing Laws, especially the Reasonable Accommodations, and on affordable housing programs. Enhance this training for compliance with consent decrees.	IHDA, IDHFS, IDHR, IDHS, IDoA, HUD	Ongoing
Improve the affordable housing referral network to connect persons with disabilities and other special needs to available, affordable, and appropriate housing.	IHDA, IDHFS, IDHS, IDoA	Ongoing

## ANNUAL COMPREHENSIVE HOUSING PLAN - TECHNICAL PLAN

### Housing Principle: Affordability and Choice

STRATEGIES / ACTIONS	Agencies and Partners	2017 Status
<b>Maximize use of Medicaid waiver program to serve the housing and service needs of elderly and special needs populations living in community-based housing</b>		
Support State's approved "Memory Care" SLP, and support more SLP for persons with physical disabilities.	DHFS, IHDA, IDVA, IDHS	Ongoing (applications for the Supportive Living Program Dementia Care Settings are currently being accepted and are under review )
Support State's move to Managed Care.	DHFS, IDHS, IHDA	Ongoing
Determine feasibility of expanding CCRS demonstration program as an alternative housing option for older adults in community-based settings.	IDHFS, IDoA, IHDA	Unclear Status
Explore Medicaid waiver payment to support housing for persons with mental illness and/or DD.	IDHFS, IDHS	See Section 1115
Review the taxonomy of General Revenue Funded PSH services provided through the Bureau of Supportive Housing, Rule 132 mental health services (MRO), and approved Rule 2090/2060 DASA services to re-define into categories of similar services and streamline billing for providers, while maintaining current funding for those individuals in GRF-Funded programs who are not eligible for Medicaid and/or require services that are not currently allowed under Medicaid.	DHFS, IDHS, IDPH	Under Review
<b>Expand capacity and enhance services offered by housing counseling agencies</b>		
Support efforts to maintain a variety of counseling services, such as foreclosure prevention, homebuyer, renter, and post purchase.	IHDA, Counseling agencies	Ongoing (FPP, NFMC)
Finalize rules and administer funding appropriated in compliance with the Save Our Neighborhoods Act of 2010 (as amended by SB16), a portion of which will be used to provide grants to fund housing counseling agencies.	IHDA	Ongoing
Expand the knowledge base of housing counselors by increasing training initiatives for housing counselors.	IHDA, Counseling agencies	Ongoing
Continue funding for housing counseling with new commitment of federal resources.	IHDA, Counseling agencies	See Legislation Agenda
<b>Support foreclosure prevention initiatives</b>		
Focus available and research new resources to create additional programs for at-risk homeowners to refinance problematic mortgage terms in favor of lower interest/fixed rates, safer terms, and reduced principals.	IHDA, Financial Institutions, IDFP, Governor's Office, State Agencies	Ongoing
Promote expansion of mediation programs that provide court-appointed legal help to Illinoisans facing foreclosure (e.g. Cook County Mortgage Foreclosure Mediation Program).	IHDA, Financial Institutions, County Clerk Offices, County Courts	Under Review
Continue to support all avenues of public and private loan modification programs, including settlements from lawsuits from large lenders.	IHDA, IDFP, Counseling agencies, Financial Institutions, Mortgage Insurance Companies	Ongoing
Identify and utilize appropriate ongoing foreclosure prevention efforts and planning that can expand understanding of major issues not-yet addressed as part of State's response to Foreclosure Crisis and increase the State's ability to address these issues.	IHDA, Governor's Office, Foreclosure Working Group	Ongoing (see Abandoned Properties Program)

## ANNUAL COMPREHENSIVE HOUSING PLAN - TECHNICAL PLAN

### Housing Principle: Affordability and Choice

STRATEGIES / ACTIONS	Agencies and Partners	2017 Status
<b>Promote and expand home repair programs that preserve single family housing stock throughout the state</b>		
Explore best practices for lead-based paint remediation in coordination with existing efforts within realistic cost framework.	DCEO, IHDA, IDPH, State Agencies	Ongoing
Explore improved coordination of existing weatherization programs with affordable housing rehabilitation funding and new Urban Weatherization Initiative funding.	DCEO, IHDA, State Agencies	Under Review
Formalize partnerships with DCEO and other State agencies to pair energy-efficiency programs with additional resources for homeowners and rental property owners to increase and encourage more affordable property maintenance and operations.	IHDA, DCEO, State Agencies	Under Review
Provide funding from Affordable Housing Trust Fund to match with DCEO-administered Community Development Assistance Program (CDAP) and with the DCEO-administered Weatherization Assistance Program to maintain the number of households that can be assisted under these programs.	IHDA, DCEO, State Agencies	Ongoing
Explore sources for additional financing for matching funds for existing home repair programs.	DCEO, IHDA, State Agencies	Ongoing
Encourage and provide support for individuals doing small scale rehabilitation.	DCEO, IHDA, State Agencies	On Hold
<b>Explore options to reduce operating costs for existing affordable housing</b>		
Develop training opportunities to transfer best practices in operating cost savings to underwriting and development of new rental properties.	IHDA, IHC	Needs further development
Inventory and publicize cost-saving insurance pooling opportunities and existing and new energy co-op and bulk purchase opportunities to encourage use by managers and developers of affordable housing.	DCEO, IHDA, State Agencies, CMS, Developers, Community Partners, IHC	Under Review (needs a sponsor)
Utilize green building efforts to identify operating cost measures/policy, as well as funding coordination opportunities to promote green incentives for affordable housing throughout Illinois.	IHDA, DCEO, IHC, Enterprise Foundation	Ongoing (more training to be scheduled)
<b>Encourage affordable housing developers to incorporate energy efficient systems and green materials into their projects</b>		
Assist affordable housing developers to access all available sources of energy efficiency funding.	IHDA, DCEO, State Agencies, Developers	Continue work on leveraging funding options
Inventory all existing federal and State energy conservation resources and promote coordinated funding structure with IHDA and other housing development programs (e.g. exploration of increased coordination between IHDA financed projects and DCEO Low Income Energy Efficient Residential Retrofit Program).	IHDA, DCEO, State Agencies, Developers	See above
Promote proven energy efficiency design innovations to determine cost savings measures for affordable housing developments.	IHDA, DCEO	Ongoing
Expand State's weatherization programs (i.e. IHWAP) to include an expanded role for rental properties as well as continued assistance to single-family programs.	IHDA, DCEO, State Agencies, Developers	Ongoing
Incorporate successful and existing cost-effective energy innovations that go beyond the scope of normal energy efficiency programs into lending practices for rental development (e.g. performance based contracting, geothermal heating, solar applications, et.al.). Conduct cost-benefit analysis when appropriate.	IHDA, DCEO, State Agencies, Developers	Ongoing

## ANNUAL COMPREHENSIVE HOUSING PLAN - TECHNICAL PLAN

### Housing Principle: Affordability and Choice

STRATEGIES / ACTIONS	Agencies and Partners	2017 Status
<b>Explore feasibility of rental housing pilot programs in rural communities and addressing the needs of migrant farm labor workers</b>		
Examine successful farm laborer-based housing initiatives nationwide and determine applicability to Illinois.	USDA-RD, IHDA, DCEO, IDPH, Illinois Migrant Council	Needs Review
Review and promote information about farm workers' rights regarding their housing and Farm Labor Camp Law.	USDA-RD, IDPH, DCEO, IDHS, IHDA, IDHR, Illinois Migrant Council	Needs a Sponsor
<b>Support efforts to create, preserve and support rental assistance programs</b>		
Encourage regional coordination among PHAs. DCEO no longer operates its HCV Program.	PHAs, Local Governments, HUD	Unclear Status
Identify priority populations best suited for the use of housing choice vouchers available through the DCEO. See Disabilities Preferencing Policy.	DCEO	NA
Encourage maintenance and expansion of fair share and special purpose Housing Choice Vouchers.	PHAs, DCEO, IHDA	Begin Implementation
<b>Assist communities to develop a balance of affordable homeownership and rental opportunities</b>		
Support single-family rental programs (e.g. AHTF).	IHDA	Ongoing
Protect tenants of foreclosed properties.	Counseling Agencies	Under Review
Support responsible and affordable homeownership programs for low to moderate-income households (e.g. Building Blocks).	IHDA, USDA, Counseling Agencies	Ongoing
Continue identification and program development efforts to further affordable rental housing development, and homeownership assistance resources, including rental assistance programs.	IHDA	Ongoing
Continue identification of homeowner home repair programs and funding opportunities to promote preservation.	IHDA	Ongoing
Continue to support and promote housing counseling programs.	IHDA	Ongoing
<b>Seek and coordinate federal/state/local resources to further assist current and expanded supportive housing populations (veterans, LGBTQ, youth)</b>		
Identify additional programs and funding sources to assist.	Interagency Subcommittee/ICOH	Ongoing
<b>Research the coordinate assessment intake to more efficiently meet homeless needs.</b>		
Review current intake assessments and assess their relationship to the coordinated assessment intake. Further develop systems where needed, such as the Uniform Assessment Tool.	IDHFS/Interagency Subcommittee	Ongoing
<b>Expand and support availability and access to supportive living services</b>		
Evaluate Illinois Medicaid 1115 Waiver requirements and options for supportive housing services.	IDHFS/Interagency Subcommittee	Ongoing
Continue to promote PHA Preferencing.	IHDA/GOHIT	Ongoing

## ANNUAL COMPREHENSIVE HOUSING PLAN - TECHNICAL PLAN

### Housing Principle: Creation and Preservation

STRATEGIES / ACTIONS	Agencies and Partners	2017 Status
<b>Directly address the demand for deinstitutionalization by creating opportunities for community-based living</b>		
Continue to investigate community-based housing models for persons with mental illness and Developmental Disabilities.	IHDA, IDHFS, IDHS, State Agencies	Underway
Provide information and education regarding available resources to encourage Universal Housing Design and visitability programs in all housing.	IHDA, IDHS, State Agencies, IHC	Ongoing
Develop strategies to assist in meeting Money Follows the Person standards and annual transition goals.	IDHS, IHDA, IDoA, IDHFS	Ongoing
Identify cost savings from State's deinstitutionalization efforts and develop plan to recapture this savings and reinvest it.	GOMB, IDHFS, State Agencies	Ongoing
Explore opportunities to increase supply of rental and operating assistance for existing / planned developments serving persons with disabilities.	IHDA, IDHS, IDoA, IDHFS, Housing Task Force	Ongoing (Targeting AHTF)
Partner with community-based organizations, municipalities, and other partners to utilize foreclosed properties as affordable rental housing opportunities for populations transitioning to community-based settings. See AHTF.	IHDA	Ongoing
Utilize Build Illinois Bond Fund to expand housing for homeless and at risk veterans.	IHDA, IDVA, Governor's Office	Completed
Explore all options to create housing opportunities for consent decree class members, including within existing housing stock.	Governor's Office, PHAs, IHDA, HUD, IDHS	Ongoing
<b>Reinvestment in Illinois' communities via innovative and effective reuse of foreclosed properties</b>		
Explore the effectiveness of "short-sale" models where foreclosed properties are sold and then rented to the previous owner at a more affordable level.	IDFPR, OAG	Under Review
Finalize rules and administer funding appropriated in compliance with the Save Our Neighborhoods Act of 2010 (as amended by SB16), a portion of which will be used to provide grants to aid municipalities maintaining abandoned properties.	IHDA, City of Chicago, Counseling Agencies, Community Based Organizations	Underway
Identify opportunities to partner with local governments, community-based organizations and non-profits to access foreclosed properties as affordable rental housing to benefit low-income families and special needs populations.	Housing Task Force, IHDA, Municipalities	Under Review
Encourage community land trust and other deed restriction mechanisms to assure that affordable homes created by government support remain affordable (e.g. Cook County Land Bank Authority, and the South Suburban Land Bank and Development Authority).	IHDA, Developers, Local Governments	Ongoing
Seek resources and mechanisms to build upon ongoing neighborhood and sub-area efforts and increase the capacity of neighborhood vacant property purchase and rehabilitation for rental or resale programs with counselling services.	IHDA, Housing Task Force, Regional Partners	Ongoing
Explore options to encourage the purchase and conversion of foreclosed properties into scattered site rental, including private market and tax incentives.	Housing Task Force, IHDA	Under Review



## ANNUAL COMPREHENSIVE HOUSING PLAN - TECHNICAL PLAN

### Housing Principle: Creation and Preservation

STRATEGIES / ACTIONS	Agencies and Partners	2017 Status
<b>Expand mortgage lending tools/products/programs for first-time homebuyers</b>		
Establish new financing resources and investments to support home mortgage lending by private institutions in cooperation with the State's housing finance agency.	IHDA, Financial Institutions	Ongoing
Continue Welcome Home Heroes Program or a similar veterans mortgage assistance effort.	IHDA, Participating Lenders	Incorporate into existing program
Encourage use of Guaranteed Loan Programs when market improves.	IHDA, Financial Institutions, USDA-RD	On Hold
Continue and expand comprehensive Employer-Assisted Housing programs that provide purchase price subsidies, low interest rates, down payment and closing cost assistance, and intensive pre- and post-purchase counseling.	Businesses and Employers, Developers, Local Communities, EAH Advocates and Administrators, IHDA	Needs Reviewing
<b>Increase access to Tax Exempt Bond financing</b>		
Encourage the utilization of bond pooling to reduce the costs associated with issuance to individual projects and developments in smaller communities.	IHDA	Ongoing
Investigate expanded marketing strategies and structures to revitalize investor interest in tax-exempt bond purchases through direct placements with pension funds, corporations, and financial institutions.	IHDA, GOMB	Under Review
Maximize the effective use and accountability for issuance use of tax-exempt bond volume cap for multi-family and single-family affordable housing by ensuring that the use of the tax-exempt bond volume cap allocated to various entities in the state maximizes the value of the resource and that bond issuers report on the households served based on type of housing, income of beneficiaries, and ongoing affordability of units assisted.	GOMB, All State Bond Issuers	Ongoing
<b>Explore non-traditional funding sources</b>		
Develop and promote specific Tax Increment Financing (TIF) models for affordable housing via providing training opportunities on TIF for affordable housing development.	DCEO, IHDA, Community Partners	Underway
Support and administer multi-year capital funding bill that includes an IHDA-administered affordable housing funding program.	Governor's Office, GOMB, IHDA, Housing Task Force	Completed
<b>Develop additional LIHTC syndication and investment options</b>		
Support legislative and regulatory changes for LIHTC to increase and expand investor interest and entice investment, such as permanently fixing 9%/4% tax credit rate.	IHDA, Developers, Community Partners, Equity Funds, Lenders	Underway
Encourage development community to participate in QAP drafting process.	IHDA	Ongoing
<b>Seek and expand additional opportunities and incentives for private financial institutions to participate in financing of affordable housing development</b>		
Create financing structures to encourage private financial institutions to participate in affordable housing development, especially in small communities.	Governor's Office, GRAC, Financial Institutions, IHDA, State Treasurer's Office, IDFP, GSE's, USDA-RD	Underway
Create shared risk lending pools for single and multi-family housing rehabilitation with layered public and private funds for areas of the state currently underserved by these financials tools.	Governor's Office, GRAC, Financial Institutions, IHDA, State Treasurer's Office, State Bank Regulators, GSE's, USDA-RD	Under Review
<b>Effective Utilization of the Illinois Affordable Housing Tax Credit funding for development of affordable housing</b>		
Expand mechanisms to market and link investors to eligible projects.	IHDA, IDHS, Governor's Office, IDOR, Advocacy Organizations	Ongoing
Increase eligible uses for IAHTC, such as rental assistance, IDAs, and homebuyer assistance.	IHDA, Community Partners, Counseling Agencies	Ongoing (as needed)

## ANNUAL COMPREHENSIVE HOUSING PLAN - TECHNICAL PLAN

### Housing Principle: Creation and Preservation

STRATEGIES / ACTIONS	Agencies and Partners	2017 Status
<b>Implement strategy to prioritize the preservation of federally assisted housing at risk of expiring (especially with rental assistance)</b>		
Design technical assistance, inspection enforcement, and financing programs to assist existing and new owners to preserve affordability, address exit tax and valuation issues, and quality of assisted housing units (e.g. Preservation Now).	IHDA, Equity Funds, Financial Institutions, Non-Profit and For-Profit Developers	Ongoing
Develop a comprehensive Federally Assisted Housing Preservation Act program to include technical assistance for tenant empowerment and favorable affordable financing.	IHDA, Equity Funds, Financial Institutions, Non-Profit and For-Profit Developers	Under Review
Explore opportunities to use tax-exempt bonds, new Treasury bond purchase program, and 4% tax credits for streamlined acquisition and preservation financing.	IHDA, Non-Profit and For-Profit Developers	Ongoing
Support federal legislation to provide exit tax relief and similar tax incentives to promote preservation of existing affordable housing.	IHDA, Equity Funds, Financial Institutions, Non-Profit and For-Profit Developers	Ongoing
<b>Improve coordination with local housing entities to increase financing opportunities</b>		
Explore methods to improve coordination between State agencies, public housing authorities, local governments and developers – especially in rural areas of Illinois.	IHDA, State Agencies, PHAs, Developers, Local Governments	Ongoing
Examine methods to expand the capacity of Community Housing Development Organizations to better serve a variety of housing needs throughout the state (including multifamily development), and continue to implement existing program.	IHDA, HUD, CHDOs	Ongoing
Identify and analyze publicly funded affordable housing investments throughout the state as part of coordinated reporting and mapping/inventory of State resources and commitments.	All State Agencies	Under Review
Explore funding and planning models that encourage and allow scattered-site rental redevelopment providing neighborhood-integrated rental housing of all types.	IHDA	Under Review
<b>Identify new and expand existing Federal and State resources and initiatives for foreclosure prevention and mitigation</b>		
Work with Illinois Department of Financial and Professional Regulation to insure regulatory enforcement of "High Cost" Mortgage Act.	Financial Institutions, IDFP, Counseling Agencies	Ongoing
Utilize CDBG Disaster Recovery resources for affordable housing creation and preservation (community stabilization) in designated areas of Illinois.	DCEO, IHDA	Under Review
Effectively implement the Hardest Hit Fund to provide mortgage refinancing and relief to Illinoisans at severe risk of foreclosure.	IHDA, Lenders, HHF Partners	Ongoing (near completion)
Identify housing strategies, programs and resources for persons not qualifying for Hardest Hit Fund assistance, including rental assistance and homeless prevention.	Housing Task Force, Housing Counseling Agencies, PHAs, CoCs	Ongoing
<b>Assist and support community re-envisioning</b>		
Fund abandoned property relief programs through existing and new funding sources.	IHDA, OAG, Municipalities	Ongoing
<b>Envision a post-crisis community support network for the State.</b>		
Maintain an effective and robust Foreclosure Prevention Program.	IHDA, IDFP, Housing Counseling Agencies	Ongoing
Continue to fund and maintain a variety of counseling services, such as foreclosure prevention, homebuyer, renter, and post-purchase.	IHDA, Housing Counseling Agencies	Ongoing
Recognize and fund home repair programs as a method of maintaining affordability and preventing foreclosure (HOME, CDBG, AHTF).	IHDA, DCEO, USDA	Ongoing

**ANNUAL COMPREHENSIVE HOUSING PLAN - TECHNICAL PLAN**

**Housing Principle: Creation and Preservation**

STRATEGIES / ACTIONS	Agencies and Partners	2017 Status
<b>Create and assist community support network for the State.</b>		
Operate the funding of abandoned property relief programs; Abandoned Properties Program, and Blight Reduction Program.	IHDA/OAG/	Ongoing, pending OMB approval
Continue to seek funding and maintain a variety of counseling services; primarily foreclosure prevention and homebuyer counseling.	IHDA, Housing Counseling Agencies, ILGA, NeighborWorks, HUD	Ongoing
Seek funding and operate home repair and homebuyer assistance programs as a method of maintaining affordability, preventing foreclosure, and preserving single-family housing stock.	HDA, Housing Counseling Agencies, ILGA, NeighborWorks, HUD	Ongoing
<b>Explore actions to further promote accessible affordable housing</b>		
Explore options to better identify existing accessible housing units and need for the same, (statewide, housing locator, waiting list, etc.).	IHDA	Ongoing
Conduct research on actual costs of adding accessibility and universal housing design to new development and rehabilitation costs.	IHDA, IDHFS, IDOA, IDVA, IDHS	Ongoing

## ANNUAL COMPREHENSIVE HOUSING PLAN - TECHNICAL PLAN

### Housing Principle: Leadership

STRATEGIES / ACTIONS	Agencies and Partners	2017 Status
<b>Coordinate affordable housing inclusion in state and federal capital and economic development initiatives</b>		
Encourage statewide expansion of Live Near Work and transit oriented development initiatives with new and existing partners.	IHDA, DCEO, TA Providers, CNT	Ongoing
Market Employer Assisted Housing programs in materials for the DCEO Opportunity Returns program; DCEO's Workforce Investment Boards; and other opportunities.	IHDA, Local TA Providers	Revise
Explore opportunities for use of Community Development Assistance Program (CDAP) funds for housing development to complement economic development activities.	DCEO, IHDA	Under Review
Work with IEPA to improve potential of developing brownfields properties and identifying programs that can be used for housing development.	IEPA, HUD	See revised plan
Design and implement legislative agenda for state and national leaders, including infrastructure initiatives.	IHDA, Housing Task Force, All State Agencies	Ongoing
<b>Increase planning coordination for transportation, economic development, and housing to attract and retain businesses, maximize investment of State resources, and improve quality of life for people and communities</b>		
Convene joint meetings between State agencies and local officials, major employers, planning organizations, developers and other interested parties in order to coordinate transportation and economic development plans with affordable housing plans.	Governor's Office and Legislature, IDOT, DCEO, IHDA, IDNR, ISTHA	On Hold
Work to fund and administer "Good Housing Good Schools.	ILGA, Governor's Office	On Hold
Examine possibilities for coordinating and promoting State investments in an integrated system to meet the housing needs of all members of the community.	IHDA, Municipal Officials, For-Profit and Non-Profit Developers, Foundations, and Community Organizations	On Hold
Utilize Governor's Office to provide leadership in integrating various State agencies and programs that encourage linked housing, transportation, and economic development along with environmental stewardship statewide.	Governor's Office, IHDA, DCEO, IDOT, IEPA	On Hold
Research interdepartmental planning and funding mechanisms that can support coordination of affordable housing development and redevelopment near transit.	IHDA, IDOT, DCEO, Governor's Office and State Agencies	Under Review
Work to fund and administer the Building Location Efficiency Incentive Act (and EDGE Incentive).	ILGA, Governor's Office, DCEO	Under Review
Research, plan, and develop a statewide economic development plan to ensure that housing is made part of that overall effort.	IHDA, DCEO	Ongoing
Determine the impact of LIHTC and other affordable housing projects on local property values.	IHDA, IHC, CSH, AALC, SHPA	Ongoing
Work with Governor's Office and applicable State agencies to determine feasibility of development of a Functional Depository of Information to be utilized by State agencies, regional planning organizations, and local practitioners to track investments and determine funding availability.	Governor's Office, State Agencies	On Hold
Continued participation with place-based interdepartmental coordination efforts, i.e. Team Illinois, Illinois Association of Small Counties, and others.	State Agencies	Under Review
Utilize ongoing regional or sub-regional organizational coordination efforts as pilot programs to identify benefits, barriers, and best practices and to address geographic/jurisdictional concerns in linked housing, transportation, and employment program delivery.	Housing Task Force	Ongoing

## ANNUAL COMPREHENSIVE HOUSING PLAN - TECHNICAL PLAN

### Housing Principle: Leadership

STRATEGIES / ACTIONS	Agencies and Partners	2017 Status
<b>Fund and support regional planning</b>		
Encourage local jurisdictions to create forward-looking housing policy plans which will, among other things, allow private sector developers to construct work force housing and affordable new homes.	IHDA, Housing Task Force	Under Review
Design programming and locate funding for a thorough and well-balanced rural Technical Assistance program that will help increase competitive and fundable project proposals and applications in rural areas with proven markets.	IHDA, IIRA, Rural Partners	In Development
Identify and support communities and regions throughout Illinois trying to access federal funding.	IHDA, Governor's Office, Housing Task Force	Ongoing
Work to fund and administer the Local Planning and Technical Assistance Act.	ILGA, Governor's Office	Under Review
Enact all or parts of a statewide resource-efficient planning policy that supports regionalism and access of federal and state dollars.	Governor's Office, IHDA, DCEO, IDOT, IEPA	Under Review
<b>Develop Illinois Federal Housing Agenda to ensure preservation, reform and expansion of federal resources and legislation for affordable housing</b>		
Advocate for federal housing and services legislation and continued funding of supportive housing.	ILGA, Governor's Office, IHC, IHDA	Ongoing
Promote continued funding and administrative ease for the implementation of the recently established National Housing Trust Fund. Advocate flexibility in Operating Assistance provisions.	IHDA	Ongoing
Work towards establishing preservation related State legislation.	ILGA, Governor's Office	On Hold
Provide outreach to inform legislators on key housing issues that impact Illinois and the nation.	Governor's Office, Housing Task Force	Ongoing
Research feasibility of making recommendations for rule changes to federal funding sources that would make them more flexible and useful for rehabilitation programs such as the Home Modification Program, HOME, NHTF, AFFH.	Housing Task Force	Ongoing
Support HEARTH Act funding to permit renewals funded separately from annual competitive grants to truly allow 30% PSH production.	Housing Task Force	Ongoing
Track long term impact of proposed budget and tax program changes on State's ability to continue to provide access to affordable housing.	All State Agencies	Ongoing
Determine appetite for advocating for changes to Reverse Mortgages that would make them eligible for persons with disabilities.	Housing Task Force	On Hold
<b>Identify opportunities to incorporate valuable lessons and promote best practices</b>		
Explore linking Statewide/Regional Housing Planning and Budgeting.	Governor's Office, IHDA, DCEO	On Hold
Review findings and deliberations of national and local efforts and consider adoption of new efforts to serve the priority populations.	Housing Task Force	Under Review
Continue Illinois Affordable Housing Awards Program as an annual event in conjunction with Governor's Conference on Affordable Housing.	Governor's Office, IHDA, GRAC, DCEO, Rural Partners	Ongoing
Showcase Illinois' Home Modification Program nationally as model to benefit persons with disabilities.	IHDA	Ongoing
Seek partnerships with philanthropic organizations and with banks to align funding efforts and extend/expand upon State investment.	Housing Task Force, IHDA	Under Review

## ANNUAL COMPREHENSIVE HOUSING PLAN - TECHNICAL PLAN

### Housing Principle: Leadership

STRATEGIES / ACTIONS	Agencies and Partners	2017 Status
<b>Support the exploration of enhanced Economic Impact Analysis of affordable housing activity by IHDA</b>		
Advise the ongoing expansion of input-output analytic tools employed by IHDA for statewide regional analysis.	IHDA, DCEO	Under Review
Continue outreach, presentations, and discussions with non-exempt and at-risk communities throughout Illinois.	IHDA, Community Partners, Governor's Office	Ongoing
Provide technical assistance to communities seeking to enact meaningful Affordable Housing Plans.	IHDA	As Needed
<b>Track legislation and serve as information clearinghouse on Federal housing spending</b>		
Advocate for federal housing and services legislation.	IHDA, Housing Task Force	Ongoing
Track effects of reduced federal appropriation levels, sequestration, and the federal debt ceiling on housing programs.	IHDA, Housing Task Force	Ongoing
Concentrate efforts on federal housing related legislation which impacts existing and future resources, tax reform, and housing finance reform.	IHDA, IHC	Ongoing
<b>Track federal tax reform, GSE reform and federal regulation</b>		
Track federal tax reform and its potential impact on Low Income Housing Tax Credits, Tax-Exempt Bond Financing, New Markets Tax Credits, and the Mortgage Interest Deduction.	IHDA, Housing Task Force	Ongoing
Advocate for affordable housing responsibilities of any new guarantor.	IHDA, Housing Task Force	Ongoing
Track funding of National Housing Trust Fund via user fees or percentage of GSE profits.	IHDA, Housing Task Force	Ongoing
Advocate for Ginnie Mae securitization of Risk Sharing Program.	IHDA, Housing Task Force	Ongoing
Track federal rule-making and provide public comments to streamline processes and fully address affordable housing objectives.	HUD, Treasury, CMMS, CFPB	Ongoing
<b>Promote equal access to quality housing for the full diversity of Illinois households</b>		
Implement HUD's Affirmatively Furthering Fair Housing Rule through coordinated Assessments of Fair Housing.	IHDA, IDFP, Housing Counseling Agencies, IDHR, Municipalities	Ongoing (further action once rules are made final)
Contingent on funding, implement rural/small city development capacity building program.	IHDA, OAG, Municipalities, Other Parties	Under Review
<b>Seek and coordinate federal/state/local resources to further assist current and expanded supportive housing populations (veterans, LGBTQ, youth)</b>		
Research population needs and compile an inventory of current available resources.	Interagency Subcommittee, ICOH	Under Review
Identify additional programs and funding sources to assist.	Interagency Subcommittee, ICOH	Ongoing
<b>Research the coordinate assessment intake to more efficiently meet homeless needs</b>		
Review current intake assessments and assess their relationship to the coordinated assessment intake. Further develop systems where needed, such as the Uniform Assessment Tool.	IDHFS, Interagency Subcommittee	Under Review

**ANNUAL COMPREHENSIVE HOUSING PLAN - TECHNICAL PLAN**

**Housing Principle: Leadership**

<b>STRATEGIES / ACTIONS</b>	<b>Agencies and Partners</b>	<b>2017 Status</b>
<b>Expand and support availability and access to supportive living services</b>		
Evaluate Illinois Medicaid 1115 Waiver requirements and options for supportive housing services.	IDHFS/Interagency Subcommittee	Ongoing
Continue to promote PHA Preferencing.	IHDA/Governor's Office	Ongoing
<b>Increase planning coordination for economic development and housing to attract and retain businesses, maximize investment of State resources, and improve quality of life for people and communities</b>		
Review DCEOs statewide economic development plan, LIHTC-Qualified Action Plan, Community Revitalization Plans, and the HUD State Consolidated Plan to explore how economic development can become incorporated in the overall efforts to further affordable housing.	DCEO,IHDA,HTF Executive Committee	Ongoing
Review the impact of LIHTC and other affordable housing funding on assisted projects to determine the impact on local property values.	IHDA, IHC, CSH, AALC,SHPA, Third Party	Ongoing
Continue development and management of state/regional/local economic impact tools.	IHDA	Ongoing
Review LIHTC Community Revitalization Plans, evaluating economic development elements.	IHDA, DCEO	Ongoing
<b>Implement the Affordable Housing Planning and Appeal Act</b>		
Continue outreach, presentations, and technical assistance with Affordable Housing Planning and Appeal Act non-exempt and at-risk communities throughout Illinois.	IHDA, Community Partners (BPI, CMAP, MPC, MMC)	Ongoing
Provide more extensive technical assistance to communities seeking to enact meaningful Affordable Housing Plans.	IHDA, Community Partners (BPI, CMAP, MPC, MMC)	Ongoing
<b>Research/Investigate solutions to address/reduce the rising cost of affordable housing</b>		
Review existing research and conduct analysis focused on affordable housing development cost containment strategies.	IHDA, IHC	Ongoing
Analyze cost savings option under the State's control and potential impact on public policies and quality of development.	IHDA, IDHFS, IDHS, IDoA, IHC	Ongoing

## Appendices

### Appendix A: Glossary of Terms, Acronyms, and Agencies

<b>State Agencies and Departments</b>	
<b>CDB</b>	Illinois Capital Development Board
<b>CFPB</b>	Consumer Financial Protection Bureau
<b>CMS</b>	Illinois Department of Central Management Services
<b>CMMS</b>	Center for Medicare and Medicaid Services
<b>DCEO</b>	Illinois Department of Commerce and Economic Opportunity
<b>DCFS</b>	Illinois Department of Children and Family Services
<b>IDJJ</b>	Illinois Department of Juvenile Justice
<b>DMH</b>	IDHS Division of Mental Health
<b>GOMB</b>	Governor's Office of Management and Budget
<b>HTF</b>	Illinois Housing Task Force
<b>IDFPR</b>	Illinois Department of Financial and Professional Regulation
<b>IDHFS</b>	Illinois Department of Healthcare and Family Services
<b>IDHR</b>	Illinois Department of Human Rights
<b>IDHS</b>	Illinois Department of Human Services
<b>IDNR</b>	Illinois Department of Natural Resources
<b>IDoA</b>	Illinois Department on Aging
<b>IDOC</b>	Illinois Department of Corrections
<b>IDOR</b>	Illinois Department of Revenue
<b>IDOT</b>	Illinois Department of Transportation
<b>IDPH</b>	Illinois Department of Public Health
<b>IDVA</b>	Illinois Department of Veterans Affairs
<b>IEPA</b>	Illinois Environmental Protection Agency
<b>IHDA</b>	Illinois Housing Development Authority
<b>ISTHA</b>	Illinois State Toll Highway Authority
<b>SHWG</b>	Supportive Housing Working Group



<b>Federal/State/Local/and Other Partners</b>	
<b>AAAs</b>	Area Agency on Aging – Local organizations that provide services and programs for seniors.
<b>CAAs</b>	Community Action Agencies.
<b>CHDOs</b>	Community Housing Development Organizations - a designated non-profit with the federal HOME program.
<b>CIC</b>	Community Investment Corporation.
<b>CIL</b>	Centers for Independent Living - Local organizations that provide services and programs for people with disabilities to help them live more independently.
<b>COC</b>	Continuum of Care.
<b>CRN</b>	Chicago Rehabilitation Network – A non-profit technical assistance provider and advocacy agency.
<b>CSH</b>	Corporation for Supportive Housing – A non-profit technical assistance provider for homeless and special needs housing and services.
<b>FHA</b>	Federal Housing Administration.
<b>FHLBC</b>	Federal Home Loan Bank of Chicago
<b>GNHSTF</b>	Governor’s Nursing Home Safety Task Force.
<b>GRAC</b>	Governor’s Rural Affairs Council.
<b>GSE</b>	Government Sponsored Enterprise (Most commonly referring to FHLB, Fannie Mae, Ginne Mae, & Freddie Mac).
<b>HUD</b>	U.S. Department of Housing and Urban Development.
<b>IIRA</b>	Illinois Institute for Rural Affairs.
<b>IMHPAC</b>	Illinois Mental Health Planning and Advisory Council.
<b>LAAs</b>	Local Administering Agencies under the Rental Housing Support Program
<b>LSHAC</b>	Lead Safe Housing Advisory Council.
<b>LSHSTF</b>	Lead Safe Housing State Task Force.
<b>NCSHA</b>	National Council of State Housing Agencies.
<b>NGA</b>	National Governors Association.
<b>OAG</b>	Illinois Office of the Attorney General.
<b>OASAC</b>	Older Adults Services Advisory Committee.
<b>OHCS</b>	Office of Housing Coordination Services.
<b>OMB</b>	U.S. Office of Management and Budget
<b>PHA</b>	Public Housing Authority.
<b>Re-Entry Working Group</b>	Governor’s Statewide Community Safety & Reentry Commission.
<b>TA Providers</b>	Technical Assistance Providers.
<b>USDA-RD</b>	U.S. Department of Agriculture-Rural Development Office.
<b>SPAR</b>	Office of Strategic Planning and Reporting

## **Funding Programs and Projects**

### **Build Illinois / Capital Fund**

Illinois Affordable Housing Capital Fund created in 2009 by the Illinois General Assembly - \$100,000,000, is appropriated for affordable housing grants, loans, and investments for low-income families and persons and an additional \$30,000,000 is appropriated specifically to assist at risk displaced veterans and low income persons with disabilities

### **CCRS**

Community Care in Residential Settings (IDoA)

### **CDAP**

Community Development Assistance Program, grants for home repair (State CDBG).

### **CDBG**

Community Development Block Grant, the HUD-funded federal block grant program.

### **CDBG Disaster Recovery Program**

Federally authorized disaster recovery programs (1771 (“Midwest”) and 1800 (“Ike”)) are available in designated counties within Illinois. These recovery programs require an affordable housing creation and preservation component. Over \$64 million available for housing programs from CDBG Disaster Recovery programs is anticipated to be available in eligible areas. Administered by DCEO and IHDA.

### **HERA**

Housing and Economic Recovery Act of 2008 – A federal law designed to address the sub-prime mortgage crisis, passed by the United States Congress on July 24, 2008. Authorizes, among other programs, the Neighborhood Stabilization Program.

### **HHF**

Hardest Hit Fund – provides targeted emergency mortgage assistance to families experiencing unemployment or underemployment in states hit hard by the economic and housing market downturn. Illinois had been awarded over \$440 million in HHF funding (through TARP) in 2010. In 2011 IHDA began to utilize the HHF funds to assist Illinois homeowners struggling to pay their mortgages due to job loss or income reduction. IHDA's HHF-HELP Program closed September 2013, and reopened in August 2016 after the Authority secured an additional award of \$269 million in federal HHF funding.

### **HOPWA**

Housing Opportunities for Persons with AIDS - federal funding to provide short term rent and mortgage utility assistance and other supportive services to people living with HIV/AIDS. Administered at the State level by IDPH.

## **Funding Programs and Projects Continued.**

### **GRF**

(State) General Revenue Funds, coming from general collected State tax revenues, not dedicated funds.

### **IHWAP**

Illinois Home Weatherization Assistance Program – administered by DCEO, includes monies from the U.S. Department of Energy, a HHS-LIHEAP Grant, State Supplemental Energy Assistance Fund, Energy Conservation and Home Repair Program), and ARRA-authorized Weatherization Assistance Program funds.

### **LIHEAP**

Low Income Home Energy Assistance Program

### **LIHTC**

Low Income Housing Tax Credit - provides federal income tax credits to investors in low-income multi-family rental housing.

### **MCC**

Mortgage Credit Certificates - a tax credit for first-time homebuyers by creating an income tax deduction that reduces a household's federal income tax liability and allows the household to have more available income to make mortgage payments.

### **MRB**

Mortgage Revenue Bonds - tax exempt bond financing for first-time homebuyers or rental housing, both income qualified.

### **MRF**

Mortgage Resolution Fund - In 2011, IHDA agreed to fund a direct loan modification program called the Mortgage Resolution Fund (MRF) with up to \$100 million of the State's Hardest Hit Funds. Through the MRF, HHF monies will be used to purchase delinquent home loans directly from lenders and capital market traders at net present value. Each qualifying mortgage debt will be brought into alignment with current home values.

### **National Housing Trust Fund (NHTF)**

Authorized by the HERA, this State-administered resource, will be used to provide funds to build, preserve, and rehabilitate rental housing that are affordable for extremely and very low income households. Of the total funding, 75% of funds are to benefit persons or households at 30% AMI or below and must go to rental housing. A maximum of 10% of funds can be used for single-family homeownership/home repair programs.

### **NSP**

Neighborhood Stabilization Program – HERA authorized HUD funding to address the mitigation of vacant and foreclosed properties in communities. Three rounds funded by HUD.

### **RHSP**

Rental Housing Support Program – State-funded rental assistance program to assist extremely and severely low-income households. Funded through new fee on mortgage recording documents. Includes program component to provide Long Term Operating Support (LTOS).

## Other Relevant Terms

### **AHPAA**

Affordable Housing Planning and Appeal Act - State law which calls for communities with less than 10% total affordable housing stock to adopt and implement local affordable housing plans.

### **Care Coordination Plan**

Illinois Medicaid's 2-year plan for meeting the State law requirement to move at least 50% of its Medicaid clients into care coordination by January 1, 2015. Under this plan, the goal is to have 2 million out of 3 million clients (or 66%) under the care of a certified Managed Care Entity.

### **Choice Neighborhoods Initiative**

A HUD initiative, which replaced HOPE VI, that provides competitive grants to PHAs and non-profits for the "transformation, rehabilitation, and replacement needs of both public and HUD-assisted housing," in addition to other activities designed to strengthen and transform surrounding neighborhoods.

### **Colbert v. Rauner Case**

Lawsuit filed on behalf of persons with disabilities who are unnecessarily confined to skilled nursing facilities (SNF) nursing homes. The consent decree implementation plan was agreed upon in November 2012. Cost to State must be budget neutral.

### **Continuum of Care (CoC)**

A local or regional group of homeless services and housing providers required under HEARTH Act funding to ensure local/regional priority needs are being annually addressed. Illinois has statewide coverage.

### **Comprehensive Housing Planning Act**

Illinois Public Act 94-965 provides that the State of Illinois shall prepare and be guided by an annual comprehensive housing plan that specifically addresses certain underserved populations. Creates Housing Task Force.

### **EAH**

Employer Assisted Housing - Public / Private assistance provided to prospective homebuyers through their employer and a public agency. Promotes live-near-work goals. Executive Order 2003-18 Governor's comprehensive housing initiative issued on 9/16/2003 to establish a statewide Housing Task Force to develop a comprehensive State housing plan, encourage joint state agency funding, and establish six Priority Populations (underserved).

### **CRP**

A Community Revitalization Program is a locally approved intentional effort that is likely to lead to measurable increases in access to employment, living wage jobs, healthcare, supportive services, community amenities, transportation, quality and affordable housing stock. The most effective CRPs involve community stakeholders, including residents, employers, and elected officials, in planning and implementing community revitalization efforts for the benefit of the entire community.

## **Other Relevant Terms, Continued.**

### **HEARTH Act**

The Homeless Emergency Assistance and Rapid Transition to Housing (HEARTH) Act –A federal Act passed in 2009 that extends resources to communities to be used for prevention and re-housing homeless persons or persons facing homelessness. The HEARTH Act changes the current Emergency Shelter Grant Program to the Emergency Solutions Grant (ESG) Program, and almost doubles the amount for ESG to 20 percent of the total for homeless assistance. The HEARTH Act consolidates the federal Supportive Housing Program, Shelter Plus Care, and the Section 8 Moderate Rehabilitation/Single Room Occupancy Program into a single Continuum of Care program. Communities will now apply to one program rather than three, reducing the administrative burden and increasing flexibility and local decision-making. Also a rural homelessness program is to be created.

### **HUD Lead Safe Housing and EPA Remodeling and Repair Rules**

These rules require lead-based paint hazard reduction and lead safe work practices in all single-family and multi-family residential property and housing built before 1978, the year lead-based paint was banned nationally for residential use, regardless of whether such property and housing receives Federal Assistance or not. HUD and EPA regulations set lead-hazard elimination requirements that emphasize eliminating lead in house dust. HUD regulation specifically requires dust-sample testing after paint is disturbed to make sure the home is lead-safe. These Regulations affect residential or rental property owners and managers, general contractors, and specialty trade contractors such as painters, plumbers, carpenters and electricians.

### **ILHousingsearch.org**

An inter-agency, statewide housing locator system launched in 2009 to allow all residents to search and list rental properties for free. ILHousingSearch.org is an interactive web portal designed to allow users to search the most current listings by a wide range of criteria including: rent range, accessibility features, location, bedrooms, screening criteria, acceptance of vouchers, school district, allowance of pets, deposits and fees, and proximity to transit. The housing locator is supported by a call center with a toll-free number to assist users, and support property owners or managers with registration and property listing in order to maintain the most current listings possible. Funded by IHDA, IDHS, IDHFS, and IDoA.

### **Ligas Consent Decree**

In the Ligas V. Rauner Consent Decree, plaintiffs held that they were segregated and institutionalized in private State-funded Intermediate Care Facilities for People with Developmental Disabilities (ICFDDs) which provide on-site long-term care services for individuals with developmental disabilities. The case was settled on June 15, 2011. A full copy of this consent decree and the implementation plan, is available on the IDHS website ([www.dhs.state.il.us](http://www.dhs.state.il.us)).

## **Other Relevant Terms Continued.**

### **Money Follows the Person**

A federal rebalancing demonstration program administered by IDHFS enacted by the Deficit Reduction Act (DRA) of 2005. Part of a comprehensive strategy to assist states in collaboration with stakeholders, to make widespread changes to their long-term care support systems by allowing people who need long-term care to live in their own homes and communities or in a setting of their choice.

### **NOFA Notice of Funding Availability**

An announcement of the availability of targeted funding, frequently used by State and federal agencies.

### **Norman Decree**

Judicial decree requiring adequate funding to support wards of the State. Implemented by DCFS.

### **RFP**

Request for Proposals for targeted funding or to procure certain types of assistance.

### **Section 1115 Waiver**

Section 1115 of the Social Security Act gives the Secretary of Health and Human Services authority to waive provisions of major health and welfare programs authorized under the Act, including certain Medicaid requirements, and to allow a state to use federal Medicaid funds in ways that are not otherwise allowed under federal rules. The authority is provided at the Secretary's discretion for demonstration projects that the Secretary determines promote Medicaid program objectives. There are comprehensive Section 1115 Medicaid waivers that allow broad changes in eligibility, benefits, cost sharing, and provider payments. There also are more narrowly drawn Section 1115 waivers as well as Section 1915 Medicaid waivers that focus on specific services and populations. (<http://kff.org/health-reform/>).

### **Supportive Housing Working Group**

A working group created by the Housing Task Force in 2007 to evaluate and present common understanding of barriers and best practices for increased and improved development of supportive housing.

### **State Referral Network**

Tied primarily to IHDA's Low Income Housing Tax Credit (LIHTC) Program, IHDA developed the Statewide Referral Network (SRN) in 2008, as an overlay on the housing locator system. The SRN is a program that links vulnerable populations to affordable housing across Illinois. Eligible populations include persons with disabilities, persons experiencing homelessness, and persons at risk of homelessness.

### **TIF**

Tax Increment Financing - Municipalities in Illinois have the authority to undertake public and private redevelopment projects in blighted areas via Tax Increment Financing (TIF) districts. There are several TIF mechanisms that may apply to affordable housing: local issuance of bonds to fund public improvements; reimbursement of development expenses; and use of tax increment revenues to pay for up to 50 percent of the direct cost of construction of new housing units to be occupied by low- and very low-income households.

### **RFA**

Request for Application – similar to the previously referred to NOFA process.

## **Other Relevant Terms Continued.**

### **Williams Consent Decree**

The Williams v. Rauner lawsuit was filed in 2005 by two people with mental illness residing in large private State-funded facilities called Institutions for Mental Diseases (“IMDs”). The plaintiffs alleged that they were needlessly segregated in IMDs and that the State of Illinois had violated the ADA and denied them the opportunity to live in integrated settings where they could lead more independent and more productive lives in their own communities. The parties reached an agreement called a Consent Decree. On September 30, 2010 the Judge gave final approval of the Consent Decree which requires the State to implement a service plan and meet a variety of annual benchmarks towards providing Community-Based living arrangements for persons with mental illness.

## **Appendix B: Housing Task Force Members**

### **Task Force Members / Housing Task Force Chair:**

Audra Hamernik  
Executive Director  
Illinois Housing Development Authority

### **Task Force Members / State Agency Members:**

Illinois Emergency Management Agency  
Illinois Finance Authority  
Illinois Department on Aging  
Illinois Department of Children and Family Services  
Illinois Department of Commerce and Economic Opportunity  
Illinois Department of Corrections  
Illinois Department of Financial and Professional Regulation  
Illinois Department of Healthcare and Family Services  
Illinois Department of Human Rights  
Illinois Department of Human Services  
Illinois Department of Natural Resources  
Illinois Department of Public Health  
Illinois Department of Transportation  
Illinois Department of Veterans' Affairs  
Illinois Environmental Protection Agency  
Illinois Department of Juvenile Justice  
Illinois Governor's Office  
Illinois Governor's Office of Management and Budget  
Illinois Housing Development Authority  
Illinois Lieutenant Governor



<b>Task Force Members/Housing Expert Members</b>	
Honorable Pamela Althoff Illinois State Senator, 32nd District (Designated by Illinois Senate Minority Leader)	Senator Iris Martinez State Senator, 20th District (Designated by Illinois Senate President)
Betsy Benito Director, Illinois Program Corporation for Supportive Housing	Allison Clements Director of Housing Initiatives Metropolitan Mayors Caucus
Diane Baker Architect Representative Worn Jerabek Wiltse Architects, P.C.	Lindsey Keyes Housing Programs Director U.S. Dept. of Agriculture
George Dinges President/Vice President Development Services Group	Antonio Riley Midwest Regional Director U.S. Dept. of Housing and Urban Development (HUD)
David Neary Executive Director Dupage Habitat for Humanity	Mike Niehaus Executive Director Windsor Homes
Nancy Firfer Board of Governor's Chair Metropolitan Planning Council	Eloy Salazar Executive Director Illinois Migrant Council
Peter Holsten President Holsten Developments	Dr. Cynthia Struthers Illinois Institute for Rural Affairs Western Illinois University
Brian Hollenback Executive Director Rock Island Economic Growth Corporation	Jennifer Hill Executive Director Alliance to End Homelessness in Suburban Cook County
Cindy Holler Founder Holler Consulting	Kevin Wiehardt Community Services Director Western Illinois Regional Council -CAA
Mary Keating Director of Community Services Dupage County	David Hirsch Director Love Funding
Robin Snyderman Principal Brick, LCC	Michael Goetz Director Laborer's Home
Rep. Marcus Evans State Representative 13 <sup>th</sup> District	

## Appendix C: (310 ILCS 110/) Comprehensive Housing Planning Act

(310 ILCS 110/) Comprehensive Housing Planning Act.  
(310 ILCS 110/1)

Sec. 1. Short title. This Act may be cited as the Comprehensive Housing Planning Act.

(Source: P.A. 94-965, eff. 6-30-06.)

(310 ILCS 110/5)

Sec. 5. Definitions. In this Act:

"Authority" means the Illinois Housing Development Authority.

"Interagency Committee" means the Interagency Committee of the State Housing Task Force, which shall consist of the following members or their senior staff designees: the Executive Director of the Authority; the Secretaries of Human Services and Transportation; the Directors of the State Departments of Aging, Children and Family Services, Corrections, Commerce and Economic Opportunity, Emergency Management, Financial and Professional Regulation, Healthcare and Family Services, Human Rights, Juvenile Justice, Natural Resources, Public Health, and Veterans' Affairs; the Director of the Environmental Protection Agency; a representative of the Governor's Office; and a representative of the Governor's Office of Management and Budget.

"State Housing Task Force" or "Task Force" means a task force comprised of the following persons or their designees: the Executive Director of the Authority; a representative of the Governor's Office; a representative of the Lieutenant Governor's Office; and the Interagency Committee. The Governor may also invite and appoint the following to the Task Force: representatives of the U. S. Departments of Housing and Urban Development (HUD) and Agriculture Rural Development; and up to 18 housing experts, with proportional representation from urban, suburban, and rural areas throughout the State. The Speaker of the Illinois House of Representatives, the President of the Illinois Senate, the Minority Leader of the Illinois House of Representatives, and the Minority Leader of the Illinois Senate may each appoint one representative to the Task Force. The Executive Director of the Authority shall serve as Chair of the Task Force. The Governor shall appoint a housing expert from the non-governmental sector to serve as Vice-Chair.

(Source: P.A. 99-564, eff. 7-15-16.)

(310 ILCS 110/10)

Sec. 10. Purpose. In order to maintain the economic health of its communities, the State must have a comprehensive and unified policy for the allocation of resources for affordable housing and supportive services for historically underserved populations throughout the State. Executive Order 2003-18 shall be codified into this Act. The purposes of this Act are to accomplish the following:

- (1) address the need to make available quality housing at a variety of price points in communities throughout the State;
- (2) overcome the shortage of affordable housing, which threatens the viability of many communities and has significant social costs, such as homelessness, concentration of poverty, and unnecessary institutionalization;
- (3) meet the need for safe, sanitary, and accessible affordable and community-based housing and supportive services for elderly persons and people with disabilities and other populations with special needs;
- (4) promote a full range of quality housing choices near job opportunities, transit options, and related amenities;
- (5) meet the needs of constituencies that have been historically underserved and segregated due to barriers and trends in the existing housing market or insufficient resources;
- (6) facilitate the preservation of ownership of existing homes and rental housing in communities;
- (7) create new housing opportunities and, where appropriate, promote mixed-income communities;
- (7.5) maximize federal funding opportunities for affordable housing or the services people need to maintain their housing with required State funding, such as, without limitation, for federal Continuum of Care networks and HOME Investment Partnerships Program project sponsors; and
- (8) encourage development of State incentives for communities to create a mix of housing to meet the needs of current and future residents.

(Source: P.A. 99-564, eff. 7-15-16.)

(310 ILCS 110/15)

Sec. 15. Annual Comprehensive Housing Plan.

(a) During the period from the effective date of this Act through December 31, 2026, the State of Illinois shall prepare and be guided by an annual comprehensive housing plan ("Annual Comprehensive Housing Plan") that

is consistent with the affirmative fair housing provisions of the Illinois Human Rights Act and specifically addresses the following underserved populations:

- (1) households earning below 50% of the area median income, with particular emphasis on households earning below 30% of the area median income;
- (2) low-income senior citizens;
- (3) low-income persons with any form of disability, including, but not limited to, physical disability, developmental disability, intellectual disability, mental illness, co-occurring mental illness and substance abuse disorder, and HIV/AIDS;
- (4) homeless persons and persons determined to be at risk of homelessness;
- (5) low-income and moderate-income persons unable to afford housing that has access to work opportunities or transportation options;
- (6) low-income persons residing in communities with existing affordable housing that is in danger of becoming unaffordable or being lost;
- (7) low-income people residing in communities with ongoing community revitalization efforts; and
- (8) other special needs populations, including people with criminal records and veterans experiencing or at risk of homelessness.

(b) The Annual Comprehensive Housing Plan shall include, but need not be limited to, the following:

- (1) The identification of all funding sources for which the State has administrative control that are available for housing construction, rehabilitation, preservation, operating or rental subsidies, and supportive services.
- (2) Goals for the number, affordability for different income levels, and types of housing units to be constructed, preserved, or rehabilitated each year for the underserved populations identified in subsection (a) of Section 15, based on available housing resources.

(3) Funding recommendations for types of programs for

housing construction, preservation, rehabilitation, and supportive services, where necessary, related to the underserved populations identified in subsection (a) of Section 15, based on the Annual Comprehensive Housing Plan.

(4) Specific actions needed to ensure the

coordination of State government resources that can be used to build or preserve affordable housing, provide services to accompany the creation of affordable housing, and prevent homelessness.

(5) Recommended State actions that promote the

construction, preservation, and rehabilitation of affordable housing by private-sector, not-for-profit, and government entities and address those practices that impede such promotion.

(6) Specific suggestions for incentives for counties

and municipalities to develop and implement local comprehensive housing plans that would encourage a mix of housing to meet the needs of current and future residents.

(7) Identification of options that counties,

municipalities, and other local jurisdictions, including public housing authorities, can take to construct, rehabilitate, or preserve housing in their own communities for the underserved populations identified in Section 10 of this Act.

(c) The Interagency Committee, with staff support and coordination assistance from the Authority, shall develop the Annual Comprehensive Housing Plan. The State Housing Task Force shall provide advice and guidance to the Interagency Committee in developing the Plan. The Interagency Committee shall deliver the Annual Comprehensive Housing Plan to the Governor and the General Assembly by January 15 of each year or the first business day thereafter. The Authority, on behalf of the Interagency Committee, shall prepare an Annual Progress Report by April 1 of the following year to the Governor and the General Assembly on the progress made toward achieving the projected goals, as defined in paragraph (2) of subsection (b), of the Annual Comprehensive Housing Plan during the previous calendar year. These reports shall include estimates of revenues, expenditures, obligations, bond allocations, and fund balances for all programs or funds addressed in the Annual Comprehensive Housing Plan.

(d) The Authority shall provide staffing to the Interagency Committee and the Task Force. It shall also provide the staff support needed to help coordinate the implementation of the Annual Comprehensive Housing Plan during the course of the year. The Authority shall be eligible for reimbursement of up to \$300,000 per year for such staff support costs from a designated

funding source, if available, or from the Illinois Affordable Housing Trust Fund.

(Source: P.A. 99-564, eff. 7-15-16.)

(310 ILCS 110/20)

Sec. 20. State Housing Task Force. The State Housing Task Force shall:

(1) (Blank).

(2) Create necessary subcommittees and appoint

subcommittee members and outside experts, with the advice of the Task Force and the Interagency Committee.

(3) Ensure adequate public input into the Annual Comprehensive Housing Plan.

(4) Involve, to the extent possible, appropriate

representatives of the federal government, local governments and municipalities, public housing authorities, local continuum-of-care, for-profit, and not-for-profit developers, supportive housing providers, business, labor, lenders, advocates for the underserved populations named in this Act, and fair housing agencies.

(5) Have input into the development of the Annual

Comprehensive Housing Plan and the Annual Progress Report prepared by the Authority.

(Source: P.A. 99-564, eff. 7-15-16.)

(310 ILCS 110/25)

Sec. 25. Interagency Committee. The Interagency Committee and its member agencies shall:

(1) Provide interagency coordination and funding

efforts to facilitate meeting the purposes of this Act, including the housing needs of priority populations;

(2) Be responsible for providing the information

needed to develop the Annual Comprehensive Housing Plan as well as the Annual Progress Report.

(3) Develop the Annual Comprehensive Housing Plan.

(4) Oversee the implementation of the Plan by

coordinating, streamlining, and prioritizing the allocation of available production, rehabilitation, preservation, financial, and service resources.

(Source: P.A. 99-564, eff. 7-15-16.)

(310 ILCS 110/30)

Sec. 30. (Repealed).

(Source: P.A. 94-965, eff. 6-30-06. Repealed by P.A. 99-564, eff. 7-15-16.)

(310 ILCS 110/90)

Sec. 90. (Amendatory provisions; text omitted).

(Source: P.A. 94-965, eff. 6-30-06; text omitted.)

(310 ILCS 110/99)

Sec. 99. Effective date. This Act takes effect upon becoming law.

(Source: P.A. 94-965, eff. 6-30-06.)