

IHDA PSH Service Provider Memorandum of Understanding (MOU) Guidance

Purpose and Introduction

The Authority's PSH Development Program RFA (Round XII) requires all projects establish at least one MOU or other legally binding agreement with a service provider and provide an executed or fully drafted copy with the Application. The purpose of this document is to provide general guidance to assist in the drafting a Memorandum of Understanding (MOU), help applicants enhance their document submissions by fully describing the services model for the proposed project, and meet the minimum requirements as established in the RFA.

Applicable Sections of the RFA

The RFA requires both a supportive service plan and a MOU(s) established with at least one or more Community-Based Service Provider(s). Projects can choose to integrate their supportive services details into their MOU/or other legally binding agreements. To understand the applicable mandatory requirements and scoring criteria, please see below:

- **Preliminary Project Assessment (PPA) Stage**

- *Availability of Opioid Remediation Funds for Qualifying Projects, Section 4:* Projects intending to apply and qualify for Opioid Remediation Funds will need to provide preliminary service details in accordance with the requirements set out in this section.
- *Preliminary Service Plan Details, Section 6.E.i.d.:* While at PPA stage MOU(s) are not required, preliminary service plan details are part of the overall project concept criteria review. Including preliminary details of supportive services coordination, whether in the form of a draft MOU or another legally binding agreement, can supplement your Project Concept narrative. Additionally, draft versions of service plans, MOU(s) or other agreements for services or referrals and other documentation to support the Project concept and/or the service plan are encouraged at time of PPA submission.

- **Application Stage**

- Mandatory Application Criteria

- *Supportive Service Plan Narrative, Section 8.B.ii.a:* A supportive service plan is **mandatory** for all projects and can either be submitted as a standalone document contained as part of one or more MOU(s) or other legally binding agreements. This referenced section of the RFA describes the minimum required service plan details. Additionally, the narrative should also include information about any additional supportive services to be provided as described in this referenced section of the RFA.
- *Memorandum of Understanding, Section 8.ii.b.:* This section establishes the **mandatory** requirement for all projects to submit an MOU or other legally binding agreement.

- **Required Service Plan Details**

- Projects are required to describe how they will make the following services available to tenants, whether directly by a service provider on the Project team or through referrals to community-based providers or other existing partnerships. The referenced sections above will provide the full scope of details to meet mandatory requirements and scoring criteria. For example:

- Case Management

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- Tenancy Support Services
- Access to behavioral health services including substance use and mental health services.
- Narrative about any additional supportive services (independent living skills support, transportation assistance, education employment supports, etc.).
- Number of proposed staff (including any staff to client ratio, hours available to tenant, etc.)
- Service funding availability for the project (if any).
- Alignment with Housing First and Harm Reduction principles including low-barrier tenant screening practices.
- Coordination between property management and social services staff.
- Plan to assist tenants in Moving On when tenants no longer need or want the intensive services offered but may still need affordable housing.

Application Scoring Criteria

- *Coordination with Community-Based Provider, Section 9.F.i.:* This section outlines the **scoring** criteria (up to 5 points are available) for evaluating how a project demonstrated coordination with a community-based provider(s).
 - Scoring is available for Projects that are able to confirm the following either within the MOU or in the service plan:
 - A community-based service provider commits to provide services **on-site** in a dedicated space.
 - The specific services that will be offered to residents;
 - The number of proposed staff;
 - The size and location of the service office space.
- *Additional Service and Support Coordination, Section 9.F.ii:* If projects seek to **score** for **additional** services and support coordination, please refer to this section to understand what service or support details must be provided (up to 5 points are available). Projects can demonstrate how additional services and supports will be made available to support tenants' ability to maintain financial and housing stability that goes beyond the criteria set in Section 9.F.i and for demonstrating partnerships with Medicaid providers.
 - Projects may score up to five points by providing confirmation that the Project has met one or more of these requirements:
 - An MOU with a service provider that is considered a Medicaid provider with experience billing for services including those covered under the current Home and Community Based Service Waiver(s) for the Project's target population. (4 points)
 - The Project provides a copy of an eviction prevention policy, which may be in draft form. (up to 2 points)
 - The Project provides confirmation in the MOU and/or service plan that at least two of the specific tenancy supports listed below will be provided via partnerships or funding related to the Project (up to 2 points):
 - Ability to connect tenants to mainstream services and entitlements (Medicaid, SSI/SSDI, SNAP, etc.);
 - Assistance with moving costs and/or furnishings at time of move-in;

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- Confirmation of rental or operating assistance that may not meet the Authority’s Underwriting Standards, but can be confirmed to be available to support tenants in the Project; and/or
- Utility assistance as demonstrated by either:
 - a. The Project **does not** include tenant-paid utilities; or
 - b. The Projects demonstrates the ability to connect tenants with utility assistance such as LIHEAP.
- *Institutional Partner Services, Section 9.J.ii:* Projects may **score** points in this category for confirming that an institutional partner meeting the RFA definition of an Anchor Institution will provide on-site medical, nutrition, or other specialized supports and services. These should be referenced on the Anchor Institution Service Checklist and included in an MOU and the Project’s service plan.

Drafting an MOU

Please consider the following tips when drafting an MOU:

- Identify the Parties Involved
 - Begin with identifying the parties to the agreement, typically the Sponsor organization or Special Purpose Entity and a Community-Based Service Provider.
- Purpose and Intent
 - Provide a concise description of the MOUs purpose and what it sets out to do or goals it wishes to accomplish through the partnership; and its intent to identify the specific responsibilities of each party.
- Background
 - This can be a brief paragraph on the importance of the partnership and the experience each party brings to the project such as a history of working directly with the proposed target population, offering relevant supportive services, etc.
- Assumption of Responsibilities and Services offered
 - The MOU should clearly lay out the responsibilities each party will undertake for your proposed project and describe the supportive services that will be made available for tenants.
 - Projects can use this as an opportunity to provide specific required service plan details to meet mandatory criteria and maximize their points by meeting the scoring criteria. Please be sure to refer to the applicable sections of the RFA to include as complete details as possible.
- Funding
 - If applicable, Projects can specify if there is dedicated funding to undertake activities under the MOU by either party.
- Duration and Renewal/Amendment
 - The MOU should make clear how long the agreement will remain in effect with a clear onset date, term, if applicable, and describe how the MOU can be renewed or amended.
- Signatures

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- Signatures from each party solidify the commitment to partner together to provide supportive services to satisfy, at minimum, the mandatory requirements of the RFA. At Application, IHDA will accept either an executed or fully drafted copy of the MOU.

Other legally binding Agreement

- IHDA anticipates that MOUs will be the most common type of Agreement utilized between Service Providers and Sponsors. However, Projects may utilize and submit for review other legally binding agreement(s) that meet all of the mandatory requirements stated above. Projects should ensure their agreement(s) also meet the scoring criteria that is being pursued to receive a complete score. Any gaps not addressed in these agreements can be detailed in a supportive service plan as deemed necessary by the Project.