# Guide to Develop a Relocation Plan

The Relocation Plan should include at a minimum four main components: A – Property Overview, B – Tenant Displacement Planning, C – Preliminary Tenant Status Report and D – Relocation Template Forms. However, additional information that is related to the project should be included as well in the Plan.

1. **Property Overview**
2. Introduction
3. Current Property Description
* Location of project (legal description)
* Year built
* How many buildings on the site?
* Total unit count
* Current Tenant Demographics
* Onsite Services
* Amenities offered at project
* Parking accommodations
1. Existing Property Unit Mix

*(Submit even for conversion projects: commercial to residential uses vice versa.)*

* Current Unit Mix (at the time of application/funding request)
* Proposed Unit Mix (if applicable)
* Revised Unit Mix (if applicable)
* Floor plan – square footage, etc. (before and after project - if applicable)
1. Site Map - Arial view of project with all structures, parking and amenities.
2. **Tenant Displacement Planning**
3. Initial Rent Rolls
	* At the time of an application (or funding request) a list of all existing tenants is mandatory.
4. Tenant Assessment

A general summary overview of tenant assessment conducted. Acknowledge the future use of the following records (document) once the project passes City Council:

* + - Site Occupancy Report (template attached)
		- One-on-one meeting to gather initial relocation needs
		- Advisory Record (template attached) - document Advisory Services
* Identify comparable units needs
* Moving needs
* Other direct/indirect needs and expenses
	+ - * Review of relocation benefits with tenants
1. Comparable units list
2. Relocation Schedule (Action Timeline)
3. Relocation Specialist’s contact information.
	* + HCD recommends hiring a specialist
4. Tenant Summary of Moves
* All moves within the last 90-day
* All moves after application (funding request)
* Include any 30-Day Vacate Notices issues, Eviction Notices, other information that is crucial to determining reason why at tenant moved-out after an application was submitted for federal funding.
* Personal property left behind
1. Relocation Budget (template attached)
2. Relocation Services – Planned Services
	* Transportation
	* Coordination assistance (i.e., school zones, doctor locations, utilities, etc.)
	* Communication
3. **Tenant Status Report**

All activity, i.e., tenant assessment and notices issued, that has transpired can be itemized and documented in a preliminary Tenant Summary Report, a tenant status report form.

1. **Template Forms**

A copy of proposed Notices and related forms are required to be reviewed by the URA Grants Management Team to confirm that URA requirement.

Sample of templates are available in this guide and on our webpage under Compliance for Developers at:

<https://houstontx.gov/housing/multifamily.html>