



NARRATIVES AND DOCUMENTATION

Overview

AHAB's decision for accrediting an organization is derived from:

- 1) the organization's application for accreditation,
- 2) the documentation provided as evidence to support the narratives within the application,
- 3) the site visit observations and discussions with the parties participating in the site visit.

The narratives and documentation are important, because they provide AHAB reviewers with our "first look" into your organization's operations and how you are performing in each of the Standards. The final accreditation report issued by the Organization Review Team provides an in-depth description of our observations and understanding of your conformance with each of the 47 Guidelines.

Your answers to the 110 indicators within the guidelines, will provide us with a good understanding of your organization, as well as assist you in organizing your application in a more efficient manner.

Narrative Responses

Narratives should be written clearly and concisely to provide AHAB reviewers with the information needed to understand your organization's conformance with each Guideline. The indicators under each guideline provide more specificity about the guideline and standard. Your response to the indicators will provide AHAB reviewers with a better understanding of your organization's operations.

Content & Organization

- a. Type the narrative response for the indicators in each guideline directly into the spaces provided in the Standards and Guidelines within the Accreditation Portal. Keep in mind, the narrative should demonstrate how your organization meets the Indicator, as well as communicate strengths or challenges that the organization is already addressing.
- b. The narrative for each indicator should be concise, directly relate to the guideline it is supporting, and be under 500 words. All indicators for each guideline are outlined in AHAB's Standards Guidelines and Indicators-August 2018 resource.
- c. If an indicator is not applicable, respond with "N/A" and a short description of why the indicator is not applicable to your organization. This is not a common occurrence, unless your organization does not participate in a specific housing program.

- d. Under your narrative responses for all indicators, navigate to the field: "Guideline x.x Supporting Documentation". If the document has already been uploaded to the Document Library, check the "Included in Document Library" box and type in the box "Please List Filename and Description".
 - For example the HR Manual, specify "HR Manual, pages 35-36".
- e. If the document is specific to only the guideline, check the box "Additional Documents" include the document name (up to 2), file name and location (i.e. page numbers, chapter) within the document that contains the supporting evidence.
 - For example, "Summer 2018 Landlord Training", Filename: landlordtrng.PDF, page 5.

Writing Style Considerations

- a. Be succinct. It is recommended to keep narratives at a maximum of 500 words in length.
- b. Be specific: use examples, facts and specific references.
 - For example, instead of "regular board meetings", use "monthly board meetings".
- c. Provide links to public websites if possible.
- d. Use active, not passive voice
 - For example, instead of "The accreditation process was initiated in fall of 2017.", use "The Housing Authority initiated the accreditation process in fall of 2017."

Supporting Documentation

Content of Documentation

- a. The AHAB Standards Guidelines and Indicators-August 2018 document sets forth examples of common documentation and evidence that may demonstrate conformity with each guideline. The Common Documentation tool in the appendix of this document, and on the AHAB website, provides a checklist of documents commonly used as evidence in support to the narrative for each guideline, as well as the status of each document. The Standards Guidelines and Indicators-August 2018 should be consulted as housing organizations work to select the best evidence to support the conformity of the guideline.
- b. Submitted documentation is not limited to the Common Documentation list. It is expected that each organization will have documentation that is unique to its operations.

- c. Although the Standards Guidelines and Indicators-August 2018 and Common Documentation are tools to assist with the accreditation application process, they are not all inclusive. AHAB reviewers will review all documentation and evidence submitted on its own merits and relevance to the candidate organization.

Additional Documentation Guidance

- a. Documentation should be selected that best demonstrates conformity with the requirements of the guideline. Selected documentation should also represent and portray the housing organization and how it performs its functions.
- b. Selected policies, procedures, and plans must be current and in use by the housing organization.
- c. More than one document may be needed to demonstrate conformity with any one guideline. That is, the housing organization may upload multiple documents for one guideline. Evidence that is unique to only one guideline should be uploaded in the standard section, immediately following the guideline in "Additional Documents". Evidence uploaded following the guideline in "Additional Documents" is limited to only two document uploads.
- d. Any document may be used more than one time, for multiple guidelines. Documents that are used as evidence for more than one guideline should be uploaded in the Documents Library. The section of the document that relates to the particular guideline and/or indicator should be described and included per the instructions in Narrative Responses, Section D above.
- e. The housing organization should think "best evidence", rather than "most evidence" to demonstrate conformity with the guideline. Uploading many examples to demonstrate conformity with the guideline can cause excess work for your organization, and for site visit preparation.

Documentation Description

- a. The housing organization is encouraged to provide a short description for each submitted document to explain relevancy to the guideline.
- b. The description should also describe any larger document from which the documentation is derived. In addition, the upload description should direct the Organization Review Team to the exact part of the uploaded documentation that demonstrates conformity. Reviewers should be able to easily ascertain the relevance of the selected documentation to the guideline.

APPENDIX

Common Documentation

Below is a general checklist for the common documentation AHAB will review once your organization becomes a candidate for accreditation. This checklist is meant to be a general guide for all organizations. It is not meant to be all inclusive, or overly specific, as we recognize there will be documentation that is needed for your individualized application and accreditation process. Evidence for compliance with a specific standard and guideline is often part of or within one or more of the documents below, along with a narrative and on-site interviews. The organization may need to develop or update a policy or procedure to ensure it is in conformance with the guideline.

GOVERNANCE	Have Current Document	Needs Updating	Don't Have - Needs Development	N/A
Articles of Incorporation and/or Enabling Legislation				
By-laws				
Board Meeting Agendas for last year				
Board Meeting Minutes for last year				
Board subcommittees: including purpose, membership and meeting frequency				
Board subcommittee Agendas for last year				
Board subcommittee Minutes for last year				
Board composition				
Board Orientation & Training materials				
Cooperation Agreement with Municipality (if applicable)				
Code of Ethics and/or Conflict of Interest policies				

FINANCIAL	Have Current Document	Needs Updating	Don't Have – Needs Development	N/A
Annual Financial Audit with management report				
Current monthly financial statements				
Finance Committee Reports for last year				
IRS 990 (if applicable)				
Investment policy				
Insurance policies and coverage amounts				
Dun & Bradstreet report (if applicable)				
Workers comp risk ratio				
Financial policies and procedures				
General Depositary agreement (if applicable)				
Declarations of Trust (if applicable)				
Procurement policy including any MWDVBE criteria				
HR DOCUMENTATION	Have Current Document	Needs Updating	Don't Have – Needs Development	N/A
Organizational Chart				
HR Policy Manual				
Job Descriptions				
Staff Orientation & Training Manuals				
Employee turnover rate				
Staff performance review process and instruments				
Employee survey instruments and aggregate results				

Other: employee ethics policy, travel policy, computer/IT/cyber policy				
OPERATIONS	Have Current Document	Needs Updating	Don't Have - Needs Development	N/A
Inspection reports on properties owned				
Inspection reports on properties leased				
Grievance Procedure for participants				
Operational manuals				
Housing policy manuals				
Examples of Work logs				
AGENCY PUBLICATIONS	Have Current Document	Needs Updating	Don't Have - Needs Development	N/A
Strategic Plan				
Annual Report				
Narratives describing programs				
Website information				
Marketing/Communications materials				
Assessment of fair housing (if applicable)				
ADDITIONAL INFORMATION	Have Current Document	Needs Updating	Don't Have - Needs Development	N/A
Active lawsuits description				
Collateral information as needed				
Contracts with other Housing Affiliates				
Lease Agreements				
Contracts or MOUs with Program service providers				
Wait list policy				

Customer survey instruments and aggregate results				
Other: outstanding findings from state or federal oversight providers				
OTHER	Have Current Document	Needs Updating	Don't Have - Needs Development	N/A