AFFORDABLE HOUSING ACCREDITATION BOARD

Standards, Guidelines and Indicators

Adopted August 23, 2018

Standard 1: Governance (10 Guidelines with 22 Indicators)

The governing body is responsible for adopting and revising policies and the budget, and for providing organizational oversight with the advice of appropriate legal counsel. Board members represent diverse professional backgrounds enabling them to obtain resources to benefit the organization's mission.

Guideline 1.1: Members of the governing body are appointed in full compliance with its organizational documents.

Indicator	Common Documentation used as Evidence for Compliance	Common Additional Information Reviewed for Compliance
1.1.1: The governing body has a process for reviewing and appointing members reflecting the community it serves and complying with its bylaws.	▪ Organization By-laws ▪ Enabling Legislation ▪ Cooperation Agreement	▪ Interview Board Chair ▪ Interview Board Member ▪ Board demographics ▪ Board composition
1.1.2: The governing body has a process for termination of a member for cause.	▪ Organization By-laws ▪ Enabling Legislation	▪ Narrative
1.1.3: The organization has an orientation and training process that is followed and regularly updated to support new and current board members in understanding the organization and his/her responsibilities.	▪ Orientation and training materials reflecting current organization information	▪ Training logs ▪ Narrative
1.1.4: The governing body observes an ethics policy and signs disclosure and conflict of interest statements.	▪ Current ethics and conflict of interest policies	▪ Current signed conflict of interest statements by board members

Standard 1: Governance

The governing body is responsible for adopting and revising policies and the budget, and for providing organizational oversight with the advice of appropriate legal counsel. Board members represent diverse professional backgrounds enabling them to obtain resources to benefit the organization's mission.

Guideline 1.2: The governing body conducts its business in full conformance with enabling legislation, sunshine laws, its bylaws, and ethical standards.

Indicator	Common Documentation used as Evidence for Compliance	Common Additional Information Reviewed for Compliance
1.2.1: The public has timely access to documentation demonstrating the organization's performance and business conduct.	▪ Current Annual Report is publicly available ▪ If housing authority: board meeting minutes posted	▪ Interview of program participants ▪ Interview of community partner
1.2.2: The governing body and staff of the organization conduct activities in the best interest of the organization, over personal interests.	▪ Policies and Procedures Manual includes conflict of interest and gifts policies	▪ Interview of staff ▪ Interview of program participants
1.2.3: The governing body has a process for reviewing allegations of misconduct and protecting individuals communicating possible misconduct.	▪ Whistleblower policy and procedure ▪ Personnel Manual	▪ Interview with CEO/ED ▪ Interview with board members ▪ Narrative

Standard 1: Governance

The governing body is responsible for adopting and revising policies and the budget, and for providing organizational oversight with the advice of appropriate legal counsel. Board members represent diverse professional backgrounds enabling them to obtain resources to benefit the organization's mission.

Guideline 1.3: The governing body understands and supports the mission of the organization.

Indicator	Common Documentation used as Evidence for Compliance	Common Additional Information Reviewed for Compliance
1.3.1: Activities of the governing body advance the mission of the organization.	- Board Meeting agendas, minutes (within last year) - Current Strategic Plan - Planning documents	- Interview with Board members - Interview with CEO/ED

Standard 1: Governance

The governing body is responsible for adopting and revising policies and the budget, and for providing organizational oversight with the advice of appropriate legal counsel. Board members represent diverse professional backgrounds enabling them to obtain resources to benefit the organization's mission.

Guideline 1.4: The governing body identifies and develops resources to serve its mission and strategic goals.

Indicator	Common Documentation used as Evidence for Compliance	Common Additional Information Reviewed for Compliance
1.4.1: The organization has professional relationships with entities that are aligned with the organization's mission and goals.	▪ Organization Narrative ▪ MOU(s) ▪ Contract(s) ▪ Partnership agreement(s)	▪ Interview with CEO/ED ▪ Interviews with program participants ▪ Interviews with community stakeholders
1.4.2: The organization has membership in professional organizations aligned with organization's mission and goals.	▪ Organization Narrative ▪ Information on website of organization and related organizations	▪ Interview with community stakeholders
1.4.3: The organization considers and includes identified resources in long term or strategic planning.	▪ Strategic plan	▪ Narrative ▪ Board documents related to planning

Standard 1: Governance

The governing body is responsible for adopting and revising policies and the budget, and for providing organizational oversight with the advice of appropriate legal counsel. Board members represent diverse professional backgrounds enabling them to obtain resources to benefit the organization's mission.

Guideline 1.5: The governing body is involved in the development of plans to address organizational needs, long-term viability and strategic risk taking.

Indicator	Common Documentation used as Evidence for Compliance	Common Additional Information Reviewed for Compliance
1.5.1: The organization develops, adheres and periodically reviews a long-term plan for meeting its mission.	- Strategic Plan - Board Meeting minutes/agendas - Other planning documents	- Interview with CEO/ED - Interview with Board members - Narrative
1.5.2: The organization participates in activities with stakeholders, policy makers and regulators.	- Organization Narrative - Correspondence, i.e. emails, letters	- Interview with CEO/ED - Interviews with community stakeholders - Interviews with program participants

Standard 1: Governance

The governing body is responsible for adopting and revising policies and the budget, and for providing organizational oversight with the advice of appropriate legal counsel. Board members represent diverse professional backgrounds enabling them to obtain resources to benefit the organization's mission.

Guideline 1.6: The governing body ensures that administrators and staff are managing the organization's financial affairs within approved budgets.

Indicator	Common Documentation used as Evidence for Compliance	Common Additional Information Reviewed for Compliance
1.6.1: The governing body meets regularly to review the organization's financial affairs.	▪ Finance Meeting agendas and minutes ▪ Finance reports at Board meetings	▪ Interview with CFO ▪ Interview with Board members
1.6.2: The governing body has adopted policies and procedures to promote accountability in managing financial affairs.	▪ Organization Narrative ▪ Financial policies and procedures ▪ Most recent annual Audit	▪ Auditor's report

Standard 1: Governance

The governing body is responsible for adopting and revising policies and the budget, and for providing organizational oversight with the advice of appropriate legal counsel. Board members represent diverse professional backgrounds enabling them to obtain resources to benefit the organization's mission.

Guideline 1.7: The governing body evaluates, understands and seeks to address community needs.

Indicator	Common Documentation used as Evidence for Compliance	Common Additional Information Reviewed for Compliance
1.7.1: The organization actively participates in meetings and boards within its community including sharing of information.	▪ Organization Narrative ▪ Correspondence, i.e. emails, letters	▪ Interview with community stakeholders
1.7.2: The organization seeks and incorporates public input into its planning on a regular basis, utilizing a variety of methods.	▪ Organization Narrative ▪ Program participant surveys ▪ Meeting agendas, minutes	▪ Interviews with program participants ▪ Interview with community stakeholders

Standard 1: Governance

The governing body is responsible for adopting and revising policies and the budget, and for providing organizational oversight with the advice of appropriate legal counsel. Board members represent diverse professional backgrounds enabling them to obtain resources to benefit the organization's mission.

Guideline 1.8: The governing body assures that its policies are effective and followed by administrators and staff.

Indicator	Common Documentation used as Evidence for Compliance	Common Additional Information Reviewed for Compliance
1.8.1: The governing body has a process for regular review of organization wide policies and procedures.	▪ Organization Narrative ▪ Policies and Procedures Manual ▪ Other evidence – memos, emails, etc.	▪ Interviews with board members ▪ Interview with CEO/ED
1.8.2: The governing body has a process for reviewing risks to the organization, regularly and as needed.	▪ Organization Narrative ▪ Minutes from committees on quality, risk management, etc.	▪ Interviews with board members

Standard 1: Governance

The governing body is responsible for adopting and revising policies and the budget, and for providing organizational oversight with the advice of appropriate legal counsel. Board members represent diverse professional backgrounds enabling them to obtain resources to benefit the organization's mission.

Guideline 1.9: The governing body supports the Executive Director, CEO, or equivalent to facilitate the success of the organization.

Indicator	Common Documentation used as Evidence for Compliance	Common Additional Information Reviewed for Compliance
1.9.1: The governing body plans and acts with collaboration and recommendations from the Executive.	- Board meeting minutes/agenda - CEO/ED Reports - Correspondence	- Interviews with board members - Interview with CEO/ED
1.9.2: The governing body has a process for reviewing and communicating to the Executive regarding his/her performance.	- Performance Measure process - Performance Review documentation - Correspondence	Interviews with board members

Standard 1: Governance

The governing body is responsible for adopting and revising policies and the budget, and for providing organizational oversight with the advice of appropriate legal counsel. Board members represent diverse professional backgrounds enabling them to obtain resources to benefit the organization's mission.

Guideline 1.10: The governing body ensures the organization has access to knowledgeable and qualified legal counsel.

Indicator	Common Documentation used as Evidence for Compliance	Common Additional Information Reviewed for Compliance
1.10.1: The governing body utilizes legal counsel as appropriate.	▪ Organization Narrative ▪ Contract with legal counsel	▪ Interview with board chair ▪ Interview with CEO/ED

Standard 2: Financial Management (9 Guidelines with 21 Indicators)

The organization manages its resources and deploys its assets to carry out its operation.

Guideline 2.1: The organization has sufficient resources to operate.

Indicator	Common Documentation used as Evidence for Compliance	Common Additional Information Reviewed for Compliance
2.1.1: The organization develops a budget based upon available resources.	▪ Board minutes ▪ Finance minutes	▪ Interview with CFO/Finance Director ▪ Interview with Finance Chair of Board OR ▪ Interview with finance function
2.1.2: The organization is meeting its financial obligations.	▪ Annual Financial Audit	▪ Narrative ▪ Auditor Report

Standard 2: Financial Management

The organization manages its resources and deploys its assets to carry out its operation.

Guideline 2.2: The organization demonstrates its fiduciary responsibility through approved policies and budgets to further the organization's established mission, goals and objectives.

Indicator	Common Documentation used as Evidence for Compliance	Common Additional Information Reviewed for Compliance
2.2.1: The organization has a budget development and approval process.	▪ Finance Policies and Procedures ▪ Board meeting minutes	▪ Narrative ▪ Interview with CEO/ED/Finance personnel
2.2.2: The organization includes board members and management staff in the budget development process.	▪ Board meeting minutes including attendees	▪ Interview with CFO/Finance Director ▪ Interview with Staff
2.2.3: The organization has an investment policy.	▪ Finance Policies and Procedures ▪ Board meeting minutes	▪ Interview with Board/CEO/ED/CFO/Finance Director ▪ Interview with appropriate personnel

Standard 2: Financial Management

The organization manages its resources and deploys its assets to carry out its operation.

Guideline 2.3: The organization operates within its budget, makes sound decisions and maximizes its resources.

Indicator	Common Documentation used as Evidence for Compliance	Common Additional Information Reviewed for Compliance
2.3.1: The organization develops and works within a budget annually in conjunction with its mission and future planning.	- Board meeting minutes - Finance committee minutes - Organization Narrative	- Interview with Board members - Interview with CEO - Interview with management staff
2.3.2: The organization analyzes its budgeted to actual variance throughout the fiscal year.	Finance reports	- Interview with CEO/ED - Interview with finance function

Standard 2: Financial Management

The organization manages its resources and deploys its assets to carry out its operation.

Guideline 2.4: The organization has an approved audit that complies with statutory and regulatory requirements.

Indicator	Common Documentation used as Evidence for Compliance	Common Additional Information Reviewed for Compliance
2.4.1: The organization demonstrates it has reviewed and met with auditors annually to discuss any recommendations.	▪ Annual Financial Audit with management report	▪ Correspondence ▪ Finance meeting minutes
2.4.2: The organization demonstrates review of audit report and response to any findings or recommendations.	▪ Correspondence with auditors ▪ Internal communication ▪ Memos	
2.4.3: The organization demonstrates inclusion of programmatic compliance in its audit.	▪ Annual Financial Audit review of performance measures	▪ Correspondence

Standard 2: Financial Management

The organization manages its resources and deploys its assets to carry out its operation.

Guideline 2.5: The organization regularly evaluates its financial position and delivers complete and accurate reports to interested stakeholders.

Indicator	Common Documentation used as Evidence for Compliance	Common Additional Information Reviewed for Compliance
2.5.1: The organization provides budget and financial statement information to board and management staff.	▪ Memos ▪ Email correspondence ▪ Reports	▪ Board meeting minutes
2.5.2: The organization provides proper documentation to creditors regarding economic factors affecting its assets or obligations.	▪ Declaration of Trust ▪ Insurance coverage documentation	

Standard 2: Financial Management

The organization manages its resources and deploys its assets to carry out its operation.

Guideline 2.6: The organization's financial position and management practices are transparent.

Indicator	Common Documentation used as Evidence for Compliance	Common Additional Information Reviewed for Compliance
2.6.1: The organization has financial policies and procedures that are in writing and meet GAAP.	▪ Annual Financial Audit ▪ Financial Policies and Procedures	▪ Interview with CFO/Finance Director ▪ Interview with Board Finance Chair
2.6.2: The organization demonstrates adherence to its own financial policies and procedures.	▪ Annual Financial Audit ▪ Financial Policies and Procedures	▪ Interview with CFO/Finance Director

Standard 2: Financial Management

The organization manages its resources and deploys its assets to carry out its operation.

Guideline 2.7: The organization complies with required regulations and has established policies regarding the fair and equitable procurement of goods and services.

Indicator	Common Documentation used as Evidence for Compliance	Common Additional Information Reviewed for Compliance
2.7.1: The organization has a written procurement policy.	▪ Procurement Policy	▪ Audit reports by regulators to review compliance with state or local regulations
2.7.2: The organization has a written small business policy and plan that incorporates Section 3 requirements (if applicable).	▪ Procurement Policy	▪ Audit reports by regulators to review compliance with state or local regulations
2.7.3: The organization demonstrates adherence to its procurement policies.	▪ Procurement Policy	▪ Audit reports by regulators to review compliance with state or local regulations

Standard 2: Financial Management

The organization manages its resources and deploys its assets to carry out its operation.

Guideline 2.8: The organization documents its financial stability, policies and practices for itself and for housing programs under its operation.

Indicator	Common Documentation used as Evidence for Compliance	Common Additional Information Reviewed for Compliance
2.8.1: The organization has a written policy for sharing information and resources with affiliates.	▪ Policies and Procedures	
2.8.2: The organization has written agreements or contracts for housing program affiliates.	▪ Contracts ▪ Partnership Agreements ▪ MOUs	
2.8.3: The organization publishes its annual performance reports including financials for public review.	▪ Annual Report ▪ Annual Financial Audit ▪ IRS 990 (if applicable)	▪ Narrative ▪ Performance reports and/or data

Standard 2: Financial Management

The organization manages its resources and deploys its assets to carry out its operation.

Guideline 2.9: The organization seeks additional revenue.

Indicator	Common Documentation used as Evidence for Compliance	Common Additional Information Reviewed for Compliance
2.9.1: The organization demonstrates efforts for researching and securing additional sources of revenue.	- Diversity of revenue sources - Fund Development efforts	- Interviews with Executive staff - Interviews with Board

Standard 3: Operational Performance (8 Guidelines with 21 Indicators)

The organization delivers and facilitates access to quality, affordable housing.

Guideline 3.1: The organization has complete, up-to-date policies and procedures that guide its operations.

Indicator	Common Documentation used as Evidence for Compliance	Common Additional Information Reviewed for Compliance
3.1.1: The organization develops and provides written policies and procedures to its residents and collaborating partners.	▪ Policies and Procedures Manual ▪ Resident Manual ▪ Correspondence	▪ Narrative ▪ Leases ▪ Contracts ▪ Memoranda of Understanding, Volunteer forms, other administrative documentation

Standard 3: Operational Performance

The organization delivers and facilitates access to quality, affordable housing.

Guideline 3.2: The organization enforces its written policies and procedures to preserve its mission and the delivery of quality, affordable housing to the communities that it serves.

Indicator	Common Documentation used as Evidence for Compliance	Common Additional Information Reviewed for Compliance
3.2.1: The organization effectively documents enforcement of written policies and procedures.	▪ Inspection logs, safety reports	▪ Correspondence
3.2.2: The organization ensures policies are readily available for review.	▪ Rights and responsibilities of residents	▪ Interviews with staff ▪ Interviews with residents ▪ Visual inspection of facilities/offices

Standard 3: Operational Performance

The organization delivers and facilitates access to quality, affordable housing.

Guideline 3.3: The organization keeps its units and grounds in clean and hazard free condition using maintenance programs designed to take existing funding into account.

Indicator	Common Documentation used as Evidence for Compliance	Common Additional Information Reviewed for Compliance
3.3.1: The organization utilizes an effective preventive maintenance program.	▪ Referenced in Policies and Procedures Manual and Operations Manual	▪ Narrative ▪ Visual inspection of computer system or manual logs ▪ Interviews of Staff
3.3.2: The organization utilizes an effective work order tracking system.	▪ Referenced in Operations Manual	▪ Narrative ▪ Visual inspection of computer system or manual logs
3.3.3: The organization utilizes industry accepted maintenance performance standards.	▪ Referenced in Operations Manual	▪ Narrative ▪ Visual Inspection of properties ▪ Interview of Staff

Standard 3: Operational Performance

The organization delivers and facilitates access to quality, affordable housing.

Guideline 3.4: "Quality housing" meets all applicable state, federal and local codes and standards.

Indicator	Common Documentation used as Evidence for Compliance	Common Additional Information Reviewed for Compliance
3.4.1: The organization maintains records on all construction materials and design.	▪ Sample construction project file	▪ Visual Inspection of files
3.4.2: The organization proactively inspects all owned inventory on a consistent basis.	▪ Operations Manual	▪ Visual inspection of maintenance and/or safety logs ▪ Interviews of Staff
3.4.3: The organization is compliant with requirements and maintains records of all inspections.	▪ Review Policies and Procedures Manual	▪ Visual inspection of records ▪ Audit and/or Report from regulators
3.4.4: The organization admits only eligible families and individuals who meet screening requirements.	▪ Entry forms for participants	▪ Narrative ▪ Visual inspection of sample of resident files ▪ Audit and/or Report from regulators
3.4.5: The organization determines income and calculates rent and utility allowances in accordance with applicable requirements.	▪ Entry forms for participants	▪ Visual inspection of sample of resident files ▪ Audit and/or Report from Regulators
3.4.6: The organization demonstrates continued compliance with rent and occupancy requirements.	▪ Policy and Procedures Manual	▪ FMV calculation documentation ▪ Visual Inspection of Leases and contracts

Standard 3: Operational Performance

The organization delivers and facilitates access to quality, affordable housing.

Guideline 3.5: Organizations that administer voucher programs educate participants and property owners and managers on the use of vouchers in a wide range of neighborhoods.

Indicator	Common Documentation used as Evidence for Compliance	Common Additional Information Reviewed for Compliance
3.5.1: The organization performs regular outreach to maximize housing opportunities for participants under a voucher program.	▪ Correspondence and promotional materials	▪ Narrative ▪ Promotional materials ▪ Interviews with Staff ▪ Interviews with Residents
3.5.2: The organization informs participants of housing opportunities in the community.	▪ Voucher Orientation materials	▪ Narrative ▪ Promotional materials ▪ Interviews with Staff ▪ Interviews with Residents

Standard 3: Operational Performance

The organization delivers and facilitates access to quality, affordable housing.

Guideline 3.6: The organization gains efficiencies by coordinating with other service agencies.

Indicator	Common Documentation used as Evidence for Compliance	Common Additional Information Reviewed for Compliance
3.6.1: The organization demonstrates its evaluation of the cost and benefits of outsourcing or subcontracting of services.	▪ Meeting minutes ▪ Correspondence ▪ Customer surveys	▪ Interview with CEO/ED ▪ Interview with CFO/Finance Director OR ▪ Narrative
3.6.2: The organization demonstrates how efficiencies are achieved with other agencies.	▪ Narrative ▪ Interviews with staff and stakeholders	▪ Narrative

Standard 3: Operational Performance

The organization delivers and facilitates access to quality, affordable housing.

Guideline 3.7: The organization ensures data security, appropriate data sharing, and accurate, timely reporting practices.

Indicator	Common Documentation used as Evidence for Compliance	Common Additional Information Reviewed for Compliance
3.7.1: The organization has and adheres to an information management and technology use policy that is reviewed for relevancy on a regular basis.	▪ Policies and Procedures Manual	▪ Narrative ▪ Interview with CEO ▪ Interview with Staff
3.7.2: The organization has and adheres to a privacy policy around resident information.	▪ Policies and Procedures Manual	▪ Interviews with Staff ▪ Interviews with Residents ▪ Sample resident file review

Standard 3: Operational Performance

The organization delivers and facilitates access to quality, affordable housing.

Guideline 3.8: The organization enforces lease or voucher terms thoughtfully and fairly.

Indicator	Common Documentation used as Evidence for Compliance	Common Additional Information Reviewed for Compliance
3.8.1: The organization ensures all lease and voucher terms are publicly available and are explained individually with each resident.	▪ Policies and Procedures Manual ▪ Sample Lease ▪ Sample Voucher agreement	▪ Interviews with residents
3.8.2: The organization ensures all lease and voucher terms are publicly available and are explained individually with each property owner.	▪ Policies and Procedures Manual ▪ Sample Lease ▪ Sample Voucher agreement	▪ Interviews with Staff ▪ Interviews with contracted property owners
3.8.3: The organization has written policies and procedures and adheres to them on an individualized, consistent basis when lease or voucher terms are violated.	▪ Policies and Procedures Manual	▪ Interviews with Staff ▪ Interviews with Residents ▪ Interviews with contracted property owners ▪ Onsite documentation review

Standard 4: Organizational Compliance (2 Guidelines with 6 Indicators)

The organization complies with federal, state and local laws, regulations and contracts in all business dealings.

Guideline 4.1: Programs and services administered by the organization comply with its policies and requirements as determined by regulators and funders.

Indicator	Common Documentation used as Evidence for Compliance	Common Additional Information Reviewed for Compliance
4.1.1 The organization complies with federal, state and local laws protecting civil rights and prohibiting unlawful discrimination.	▪ Policies and Procedures Manuals ▪ Outstanding lawsuits	▪ Audit and/or reports from regulators
4.1.2: The organization has policies and procedures for monitoring compliance and taking action on non-compliance with the requirements of regulators and funders.	▪ HR Policies and procedures ▪ Operational policies and procedures ▪ Quality assurance program	▪ Audit and/or reports from regulators ▪ Narrative
4.1.3: The organization researches new policies and requirements applying to their organization on a regular basis.	▪ Organizational narrative ▪ Correspondence	▪ Interview with CEO/ED ▪ Interview with Staff ▪ Narrative
4.1.4: The organization carries appropriate levels of insurance or reserves to safeguard against any unforeseen obligations.	▪ Insurance policies	▪ Annual Financial Audit management report ▪ Review of insurance policies with carrier

Standard 4: Organizational Compliance

The organization complies with federal, state and local laws, regulations and contracts in all business dealings.

Guideline 4.2: The organization communicates to staff and other stakeholders policies or requirements affecting their roles or duties.

Indicator	Common Documentation used as Evidence for Compliance	Common Additional Information Reviewed for Compliance
4.2.1: The organization conducts orientation for all new and current staff and volunteers.	▪ Training materials	▪ Narrative ▪ Training attendance logs
4.2.2: The organization ensures staff maintain proper training, continuing education and licensing documentation.	▪ HR Policies and Procedures manual ▪ HR or vendor file documentation	▪ Audit and/or reports from regulators

Standard 5: Executive Leadership Team (6 Guidelines with 13 Indicators)

The executive leadership of the organization implements the mission, goals and policies of the organization and is responsible for meeting accreditation standards.

Guideline 5.1: The Executive Director, CEO, or equivalent is the liaison to the governing body and communicates frequently with it.

Indicator	Common Documentation used as Evidence for Compliance	Common Additional Information Reviewed for Compliance
5.1.1: Reports from the ED/CEO directly to the Board should be demonstrated in governance communication.	▪ Board reports	▪ Interview with CEO ▪ Interview with Board members
5.1.2: Board members participate in performance evaluation of ED/CEO.	▪ Performance evaluation tool	▪ Narrative ▪ Interview with CEO ▪ Interview with Board members

Standard 5: Executive Leadership Team

The executive leadership of the organization implements the mission, goals and policies of the organization and is responsible for meeting accreditation standards.

Guideline 5.2: The executive leaders of the organization clearly model personal and organizational integrity.

Indicator	Common Documentation used as Evidence for Compliance	Common Additional Information Reviewed for Compliance
5.2.1: The organization has developed and adheres to ethics and conflicts of interest policies.	▪ Policies and procedures	▪ Narrative ▪ Annual review of executive team disclosures of conflicts of interest along with board members
5.2.2: The organization has evaluative tools for how the agency and leadership is perceived.	▪ Performance reviews Surveys or questionnaires – staff and customer	▪ Narrative ▪ Performance reviews are not one-sided, i.e. employee has opportunity to review supervisor(s) and organization performance

Standard 5: Executive Leadership Team

The executive leadership of the organization implements the mission, goals and policies of the organization and is responsible for meeting accreditation standards.

Guideline 5.3: The executive leaders develop a culture of innovation, engagement and continuous improvement.

Indicator	Common Documentation used as Evidence for Compliance	Common Additional Information Reviewed for Compliance
5.3.1: The executive leadership seeks input from all levels of the organization's personnel.	▪ Correspondence ▪ Staff surveys ▪ Performance evaluation tools	▪ Narrative ▪ Interviews with staff
5.3.2: The executive leadership provides timely feedback when input is given by personnel.	▪ Correspondence	▪ Narrative ▪ Interviews with staff

Standard 5: Executive Leadership Team

The executive leadership of the organization implements the mission, goals and policies of the organization and is responsible for meeting accreditation standards.

Guideline 5.4: The organization encourages and provides opportunities for professional development of employees.

Indicator	Common Documentation used as Evidence for Compliance	Common Additional Information Reviewed for Compliance
5.4.1: The organization assesses its needs and correlates training with the professional development of staff.	▪ Correspondence	▪ Narrative ▪ Interviews with Executive team ▪ Interviews with staff
5.4.2: The organization promotes mentoring and effective supervision of staff at all levels of the organization.	▪ Performance evaluation process ▪ Supervisor/staff meeting documentation	▪ Narrative ▪ Interviews with staff
5.4.3: The organization plans for succession or progression of staff within the organization.	▪ HR Policies and Procedures ▪ Organizational Chart ▪ Performance evaluation tool	▪ Narrative ▪ Interviews with staff

Standard 5: Executive Leadership Team

The executive leadership of the organization implements the mission, goals and policies of the organization and is responsible for meeting accreditation standards.

Guideline 5.5: Communication with staff and residents is clear, delivered frequently, and through accessible channels.

Indicator	Common Documentation used as Evidence for Compliance	Common Additional Information Reviewed for Compliance
5.5.1: Communication and activities from executive staff are consistent, transparent and reflect the mission of the organization.	▪ Correspondence ▪ Organizational narrative	▪ Visual inspection of flyers, announcements at properties, admin offices, public places
5.5.2: The organization communicates in the most effective way to the intended recipient.	▪ Correspondence ▪ Organizational narrative	▪ Visual inspection of flyers, announcements at properties, admin offices, public places

Standard 5: Executive Leadership Team

The executive leadership of the organization implements the mission, goals and policies of the organization and is responsible for meeting accreditation standards.

Guideline 5.6: The Executive Director, CEO, or equivalent is responsible for assuring that the organization meets accreditation standards.

Indicator	Common Documentation used as Evidence for Compliance	Common Additional Information Reviewed for Compliance
5.6.1: The ED/CEO has formally communicated to the organization the importance and value of accreditation and the process for the whole organization.	- Correspondence - Appointment of Accreditation Coordinator - Establishment of Accreditation Committee	Narrative
5.6.2: The Accreditation Coordinator oversees the accreditation process with the support and involvement of the ED/CEO.	Correspondence	Narrative

Standard 6: Community Engagement and Improvement (4 Guidelines with 10 Indicators)

The organization actively participates in the development of quality relationships and community opportunities to benefit its program participants.

Guideline 6.1: The organization advocates for affordable housing.

Indicator	Common Documentation used as Evidence for Compliance	Common Additional Information Reviewed for Compliance
6.1.1: The organization promotes its mission to the public in various ways.	▪ Promotional material in digital and print ▪ Organizational narrative	▪ Interview with CEO/ED ▪ Interviews with community stakeholders
6.1.2: The organization has a presence on policy making bodies.	▪ Correspondence ▪ Narrative	▪ Interview with CEO/ED ▪ Interviews with community stakeholders

Standard 6: Community Engagement and Improvement

The organization actively participates in the development of quality relationships and community opportunities to benefit its program participants.

Guideline 6.2: The organization provides data to municipalities for development of a comprehensive housing assessment strategy when requested.

Indicator	Common Documentation used as Evidence for Compliance	Common Additional Information Reviewed for Compliance
6.2.1: The organization is able to track meaningful data in all of its programs and services.	▪ Organization narrative ▪ Correspondence ▪ Reports	▪ Audit reports
6.2.2: The organization is able to interpret meaningful data and communicate it in aggregate for a variety of uses.	▪ Annual reports ▪ Organizational Narrative	▪ Audit reports

Standard 6: Community Engagement and Improvement

The organization actively participates in the development of quality relationships and community opportunities to benefit its program participants.

Guideline 6.3: The organization promotes collaborative strategies to address the needs of the community.

Indicator	Common Documentation used as Evidence for Compliance	Common Additional Information Reviewed for Compliance
6.3.1: The organization cultivates relationships with other entities serving the community.	▪ Correspondence	▪ Interviews with community stakeholders ▪ Narrative
6.3.2: The organization assesses its relationships with other entities serving the community on a regular basis or as needed.	▪ Correspondence	▪ Interviews with community stakeholders ▪ Narrative
6.3.3: The organization participates in collaborative strategies.	▪ Correspondence ▪ Public facing materials from collaborations	▪ Interviews with community stakeholders ▪ Narrative

Standard 6: Community Engagement and Improvement

The organization actively participates in the development of quality relationships and community opportunities to benefit its program participants.

Guideline 6.4: The organization engages with communities and institutions for community planning and development such as infrastructure, education, transportation, health care, and commercial growth.

Indicator	Common Documentation used as Evidence for Compliance	Common Additional Information Reviewed for Compliance
6.4.1: The organization researches and seeks out current trends and information around community development and planning.	▪ Correspondence ▪ Public facing materials from meetings showing attendance and/or membership	▪ Interviews with community stakeholders ▪ Narratives
6.4.2: The organization articulates the value of affordable housing and how it positively affects the other sectors in the community.	▪ Correspondence ▪ Public facing materials	▪ Interviews with community stakeholders ▪ Narrative
6.4.3: The organization fosters resident participation in community planning and development.	▪ Correspondence ▪ Membership and/or attendance on ad hoc committees or meetings	▪ Interviews with residents ▪ Interviews with community stakeholders ▪ Narrative

Standard 7: Quality of Life for Residents (4 Guidelines with 9 Indicators)

The organization facilitates access to services, which improve the quality of life for program participants.

Guideline 7.1: The organization proactively addresses threats to resident well-being.

Indicator	Common Documentation used as Evidence for Compliance	Common Additional Information Reviewed for Compliance
7.1.1: The organization has and adheres to a safety and security plan for all physical locations with staff and/or participants.	▪ Organization Safety Plan ▪ Security procedures ▪ Minutes of safety committee or minutes reflecting safety and security plan	▪ Interviews with staff ▪ Interviews with participants ▪ Visual inspection of facilities for required safety features
7.1.2: The organization has written policies around program participant safety.	▪ Resident Manual ▪ Policies and Procedures Manual	▪ Interviews with staff ▪ Interviews with residents
7.1.3: The organization reviews safety and security status and resources on a consistent basis.	▪ Minutes of safety committee or minutes reflecting safety and security plan	▪ Narrative
7.1.4: The organization has an updated disaster preparedness plan.	▪ Organization disaster preparedness plan	▪ Narrative

Standard 7: Quality of Life for Residents

The organization facilitates access to services, which improve the quality of life for program participants.

Guideline 7.2: The delivery of program services is well defined and transparent.

Indicator	Common Documentation used as Evidence for Compliance	Common Additional Information Reviewed for Compliance
7.2.1: The organization clearly defines what program services are provided, including by collaborative partners.	▪ Organizational materials	▪ Narrative ▪ Promotional materials ▪ Interviews with Staff ▪ Interviews with Residents
7.2.2: The organization clearly describes the expectations of the resident, the organization and/or the service provider in all program delivery.	▪ Organizational materials	▪ Narrative ▪ Promotional materials ▪ Interviews with Staff ▪ Interviews with Residents

Standard 7: Quality of Life for Residents

The organization facilitates access to services, which improve the quality of life for program participants.

Guideline 7.3: The organization actively engages and coordinates its actions with local partners to enhance opportunities for the residents and the properties under its management.

Indicator	Common Documentation used as Evidence for Compliance	Common Additional Information Reviewed for Compliance
7.3.1: The organization demonstrates knowledge of its residents' needs through the partnerships it engages in.	▪ Contracted or MOU supportive services	▪ Interviews with Residents ▪ Interviews with Staff ▪ Interviews with community stakeholders ▪ Narrative
7.3.2: The organization works with local partners to provide services onsite and encourages residents to participate in programs in the community.	▪ Contracted or MOU supportive services	▪ Visual inspection of promotional materials in public areas ▪ Interviews with Residents ▪ Narrative

Standard 7: Quality of Life for Residents

The organization facilitates access to services, which improve the quality of life for program participants.

Guideline 7.4: The organization advocates for residents' and clients' non-housing needs with local service providers.

Indicator	Common Documentation used as Evidence for Compliance	Common Additional Information Reviewed for Compliance
7.4.1: The organization demonstrates the understanding of other amenities or support services needed in a community to have a high quality of life.	▪ Organizational narrative ▪ Promotional materials ▪ Correspondence	▪ Interviews with residents

Standard 8: Customer Service (4 Guidelines with 7 Indicators)

The rights and dignity of customers such as applicants, residents, participants and others are respected throughout the organization.

Guideline 8.1: The organization identifies and understands who its customers are, such as:

- Applicants
- Residents
- Voucher Holders
- Property Owners & Managers
- The Public

Indicator	Common Documentation used as Evidence for Compliance	Common Additional Information Reviewed for Compliance
8.1.1: Terms representing each of these customers, as applicable, are represented in organization materials.	▪ Policies and Procedures Manual ▪ Organizational narrative	▪ Various materials – flyers, promotional materials, bulletin board, etc. ▪ Interviews with residents ▪ Interviews with stakeholders

Standard 8: Customer Service

The rights and dignity of customers such as applicants, residents, participants and others are respected throughout the organization.

Guideline 8.2: The organization uses results-oriented approaches, demonstrating that it exists to benefit its customers.

Indicator	Common Documentation used as Evidence for Compliance	Common Additional Information Reviewed for Compliance
8.2.1: The organization works with participants on an individualized basis, with actions informed by the participant's expectations and strengths.	▪ Resident Manual ▪ Policies and Procedures Manual	▪ Sample participant record ▪ Narrative

Standard 8: Customer Service

The rights and dignity of customers such as applicants, residents, participants and others are respected throughout the organization.

Guideline 8.3: Customers have opportunities to provide input on organizational decisions.

Indicator	Common Documentation used as Evidence for Compliance	Common Additional Information Reviewed for Compliance
8.3.1: The organization facilitates resident input through advisory representation to inform executive leadership.	▪ Board composition information ▪ Policies and Procedures Manual	▪ Interviews with residents ▪ Narrative
8.3.2: The organization facilitates other customer input through procedures to inform executive leadership.	▪ Correspondence ▪ Customer hotline	▪ Examples of customer surveys, including housing partners ▪ Narrative
8.3.3: The organization conducts surveys that include residents to gather different perspectives when making decisions.	▪ Resident surveys ▪ Other evaluation tools	▪ Narrative

Standard 8: Customer Service

The rights and dignity of customers such as applicants, residents, participants and others are respected throughout the organization.

Guideline 8.4: The opinions and requests of residents are taken into consideration when making decisions for the organization.

Indicator	Common Documentation used as Evidence for Compliance	Common Additional Information Reviewed for Compliance
8.4.1: The organization has a process to respond to and resolve resident requests.	▪ Resident Manual ▪ Policies and Procedures Manual	▪ Interviews with residents
8.4.2: The residents' input is reflected in documentation around decision making.	▪ Makeup of board committees includes resident representation ▪ Minutes reflect resident input	▪ Interviews with residents ▪ Narrative