

Existing Tenant Engagement Guidelines in the Bond/Tax Credit Program Preservation Pilot

July 2026

Introduction

Engaging residents who already live in a building that has planned rehabilitation, renovation, and/or resyndication is now a requirement for all preservation and acquisition/rehab projects. This document will serve as a guide for the specific type of engagement that should happen in these proposed projects. Please note that for the purposes of engagement, the terms “tenant” and “resident” are used interchangeably and include anyone currently residing in the building.

What is meant by tenant engagement?

Engagement is an intentional process with the purpose of working inclusive and respectful ways to shape decisions. Engagement is:

- **Purposeful and goal-driven:** Tenants should be given a clear plan that includes the goals of the engagement and how their participation will be incorporated into the final result. The plan should transparently identify negotiables (where tenants can have influence and make recommendations) and non-negotiables (decisions that have already been made or are not within the scope of the project).
- **Trust-focused and relationship-focused:** The choice about how the engagement is conducted and who leads the effort should be based on trusted relationships. If there is a property manager who has a long tenure and has developed positive relationships with tenants, that may be a great choice for an engagement facilitator. If that trusted relationship is not in place, a local Community Based Organization (CBO), such as a senior center or other organization where tenants already receive support, can be recruited into the effort.
- **Values-based and people-centered:** Engagement plans should be focused on the experience of the residents in the building. The process of engagement should

consider tenants' schedules, preferred communication methods, interests, accessibility needs, and level of desired participation. Incentives such as meals, gift cards, raffles, or other rewards should be offered to encourage more participation.

- **Inclusive and equity-centered:** Care should be taken to remove barriers to participation. Factors such as scheduling, compensation, child-care needs, accessibility needs, languages, and styles of communication should be addressed in the plan and budgeted resources for engagement so that all tenants have opportunities and incentives to participate. Care should be taken to ensure that cultural fluency and sensitivity **are** centered in the engagement process. By addressing these barriers, engagement moves from a transactional relationship to a partnership that respects (tenants/residents) as the primary experts of their own community.
- **Impact and outcome oriented:** Project goals should be centered around improving the quality of life of residents. Communicating the outcomes that residents can expect from the project and from their participation in the engagement should be clear. A critical step in the engagement process is demonstrating to the tenants what was heard during the feedback gathering, how that feedback was incorporated into the project plan, and whenever feedback was not incorporated, why it was not.

How should tenant engagement happen?

Sponsors have several options for conducting the engagement, including the following:

- Contract with a qualified CBO that is connected to building residents to create and implement an engagement plan in partnership with the developer. This option is eligible to score additional points in the evaluation.
- Use existing property management or developer staff to conduct the engagement. Although you're not required to use one of the toolkits provided by the Commission, they can be a helpful resource. The "[Promising Practices](#)" document also has a section on engagement that can be used to aid in planning.
- Hire a third-party consultant with expertise in community engagement.

Please note that pre-approval of engagement process by WSHFC staff is not necessary for this pilot; however, application materials require that projects review and adhere to these guidelines.

When should engagement happen?

Engagement planning should begin prior to application, including decisions about:

- Who will lead the engagement, as well as clear roles for partners, property managers, and resident groups
- Primary points of contact for tenants and helpful resources along the way
- Approximate timeline and budget for the engagement
- Plan for reducing barriers and incentivizing tenant participation
- Scope of the engagement
- Plan for implementing the results of the engagement into the project

Engagement prior to certainty of the project moving forward can cause harm to tenants by raising expectations that may not be achievable. Developers who have already begun engagement or who do tenant engagement on an ongoing basis should ensure that expectations about the project are transparent and communicated clearly.

What should be covered in the engagement?

The scope of the engagement will vary, but generally engagement scopes should include the following elements, as applicable:

- **Relocation:** Tenants should be a part of the decision-making process about how relocation will happen, how long it will take, etc. Keep in mind that some tenants have strong feelings about their specific units. All relocation plans must comply with relevant authorities.
- **Maintenance & Repairs:** The plan should include soliciting feedback from tenants and operating staff and addressing any existing maintenance issues with the property to ensure their concerns are addressed.
- **Rent Levels and Certification Processes:** Communication should be very clear to tenants about any changes to rent/AMI levels or any new qualification processes that may occur because of a new allocation of bond cap and tax credits.
- **Physical building changes:** Wherever possible within the timeline and budget of the project, tenants should have influence over planned updates to the building. These could include, but aren't limited to, the following:
 - Appliances
 - Systems such as HVAC, electrical, elevators, etc.
 - Fixtures/finishes

- Amenities and community spaces
- Accessibility updates
- Landscaping/curb appeal
- Parking for cars and bicycles
- Design and artwork
- Security features
- Wayfinding
- **In-Unit Cooling:** As in-unit cooling is a threshold requirement for preservation projects, it is critical to include this item as a part of your engagement with tenants. While we do not require corridor cooling, we recommend exploring opportunities to add corridor cooling wherever possible.
- **Services/Programming:** Tenants should be involved in deciding what kinds of services and programming for community spaces and amenities will be changed or added to the project, including who will provide services, how tenants will access them, what the schedule will be, etc. Preservation projects should consider and center culturally specific services and programs as much as possible.
- **Management/Personnel:** Changes to ownership, management, or tenant-facing personnel should be discussed with tenants. If these decisions have not already been made, tenants should be given the opportunity to influence the way the property is managed.

What documentation will be required for the application?

There is a specific Existing Tenant Engagement Response Form for the Preservation Pilot, which asks for all the information required. Please complete this form thoroughly, and attach any supplemental materials you may have, for example:

- MOU with a CBO or consultant who will be conducting engagement
- Surveys, agendas, or other materials that may be used during the engagement
- Budget showing expenses associated with the engagement, including staff hours that will be dedicated to the engagement

Please note that we are not expecting engagement to have been completed at the time of application, although some developers may have ongoing processes of engagement that have guided project plans. We expect to see detailed plans for engagement that will begin once the project has been cleared for an allocation, as well as a plan for how the results of that engagement will be incorporated into the project.