



**INDIANA DEPARTMENT OF ADMINISTRATION  
POLICY ON THE MANAGEMENT, MAINTENANCE, AND USE OF  
STATE-OWNED HOUSING FACILITIES**

**Effective Date:** September 1, 2022

**Authority:** IC 4-13-1-4(10)  
IC 4-20.5

**Application:** This Policy applies to all state agencies and state employees residing in or using a state-owned residence or housing facility.



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**Policy Revision History:** The latest version of this Indiana Department of Administration Policy on the Management, Maintenance, and use of State-Owned Housing Facilities (“State-Owned Housing Policy” or “Policy”) shall supersede all prior formal or informal policies and procedures. *Prior versions: October 1, 2001, and February 5, 2020*

## **I. AUTHORITY**

- A. The Indiana Department of Administration (IDOA) will be the final authority in all matters pertaining to the management, maintenance, and use of all state-owned housing facilities, which may also be referred to as state-owned residences. *See* definition at IV.C.
- B. The IDOA may, at its discretion, delegate the administration and property management functions to an agency, a qualified, independent property management firm, or any other similar agent (“delegated entity”). In the event of a dispute between or among any of the signatories to a lease or the designees, including an agency or an institution, the dispute will be resolved by the Commissioner of IDOA, whose decision will be final and binding upon all parties to the lease.
- C. A delegated entity will have a written policy for these administration and property management functions and that policy will be provided to IDOA. IDOA will have final approval of said policy.

## **II. APPLICATION**

This policy applies to all state agencies and state employees residing in or using a state-owned residence or housing facility. These procedures are applicable to all facilities operated by state agencies which have state-owned residences as well as all staff assigned to those residences.

## **III. POLICY STATEMENT**

The IDOA has the overall responsibility for all state-owned residences. State agencies shall closely follow the uniform procedures that the IDOA has developed for the use and maintenance of state-owned residences. Agencies shall ensure that all state-owned residences are inspected and maintained appropriately. Any changes in the use of these residences shall be made in accordance with the IDOA guidelines.

## **IV. DEFINITIONS**

For the purpose of this policy, the following definitions apply:

- A. **INDIANA DEPARTMENT OF ADMINISTRATION (IDOA):** The state agency responsible for the management, maintenance and use of all state-owned housing or residences.
- B. **STAFF:** Any person employed by the state of Indiana full or part-time.
- C. **STATE-OWNED RESIDENCE/HOUSE/FACILITY:** Any property owned by the state which is offered to staff for the purpose of a residence either long term, short term, or temporary.

## **V. USE OF STATE-OWNED RESIDENCES**

State-owned residences may be occupied by staff only in order to (1) promote the security and essential functions of the agency's primary facility, (2) promote the health and safety of the patients, inmates, staff, visitors, and (3) support the protection of the facility, and whose job requirements qualify them under the criteria in these administrative procedures. The immediate family members or legal dependents of a staff person assigned to a state-owned residence may reside in the housing. Upon leaving the service of the state or being transferred to a different facility or position, the staff person and any immediate family or legal dependents shall vacate the premises in accordance with the lease agreement and this policy.

While leasing State-owned residences or facilities, the staff person shall not use the unit for the purpose of conducting business or any other profit-making activities, including but not limited to retail sales activities, service sales activities, or wholesale sales activities without the prior written approval of the agency, such written agency approval being provided to IDOA's deputy commissioner of state resource management.

All occupants of state-owned residences are to follow all local, state and federal laws, rules and ordinances, as well as all applicable State and agency policies and procedures.

## **VI. CRITERIA FOR OCCUPANCY OF STATE-OWNED RESIDENCES**

Based upon procedures established by the IDOA, agencies shall adhere to the following criteria in the assignment of state-owned residences to staff:

- A. Health and Safety

Housing may be approved in cases where the position requires that the person be available upon the premises for the general health and well-being of the patients, staff, or visitors served by the agency's primary facility.

**B. Housing as a Job Requirement**

In certain instances, it may be a requirement of the job for employees to live in State-owned housing.

**C. Security Needs**

A state-owned residence may be approved in cases where the position provides property protection as a result of the facility being operational on a 24-hour basis.

**D. Physical Plant Demands**

State housing may be available where it can be clearly established that certain maintenance staff is required to be in close proximity and on 24-hour call to respond to the emergency needs of the physical plant or in cases where manually controlled energy systems are essential to the daily operation of the physical plant.

**E. Housing as Job Incentive**

State-owned residences may be approved in cases where a position has proven to be chronically difficult to fill and maintain. With the approval of the agency Director and IDOA, state-owned residences may be offered to staff as a job incentive, after the position has been vacant for six (6) or more months and when the state-owned residence is not needed by other staff meeting the criteria for residing in state-owned residences.

## **VII. ASSIGNMENT OF STATE HOUSING**

The assignment of state-owned residence shall be made consistent with these administrative procedures. All housing assignments shall be made based upon the needs of the agency's primary facility and the agency.

The initial designation of a staff person for assignment shall be the responsibility of each state agency requesting or requiring on-site housing for employees using the justification form attached to this Policy as Attachment I.

The agency will then prepare a lease, approved by IDOA. (A copy of the most current version of the State of Indiana Residential Lease may be found at this link <https://www.in.gov/idoa/state-purchasing/contract-administration/leasing-boilerplates-and-documents/> under "Templates".)

**STAFF REQUESTS FOR ASSIGNMENT TO A STATE-OWNED RESIDENCE:** Staff persons may request the assignment of a state-owned residence on an annual basis. Requests for assignment to a state-owned residence shall be made, in writing, to the designated individual within each agency.

Staff requesting a state-owned residence must show how they meet the criteria established in these administrative procedures. (See Attachment I: Information Required in Justification for State Housing.)

## **VIII. RESPONSIBILITIES OF THE EMPLOYEES ASSIGNED STATE-OWNED RESIDENCES**

### **A. General Responsibilities:**

All staff assigned to a state-owned residence shall be obligated to respond immediately to emergency situations in which there is a threat to life, property or security, as directed by the designated agency staff or designees.

Any assigned state-owned residence shall not be used for the purposes of conducting any illegal activities, including, but not limited to:

1. The sale or distribution of narcotic drugs or other controlled substances;
2. The sale or distribution of alcoholic beverages;
3. Gaming or gambling; and
4. The harboring of fugitives.

Staff and any other persons residing or visiting in a state-owned residence must comply with all local, state and federal laws, rules and regulations.

Staff shall be required to agree to and sign a lease agreement for the property and provide proof of insurance prior to occupancy.

It shall be the responsibility of the staff person occupying the state-owned residence to maintain the premises and surrounding grounds in a neat and orderly fashion and in compliance with the terms and obligations set forth within the lease agreement.

## **IX. INSPECTIONS**

As the agency responsible for the overall management of state-owned residences, the IDOA, and the agency designee shall conduct annual, on-site inspections of all state-owned residences and their state-owned contents. The agency and the IDOA reserve the right to inspect any state-owned residence at any time upon reasonable notice to the staff person.

The agency staff shall inspect each state-owned residence at least annually and whenever a staff person leaves a state-owned residence. Staff shall use the “Residence Inspection Report” (See Attachment II) when conducting this inspection. The Physical Plant Director at the facility shall maintain a copy of the “Residence Inspection Report” and shall also provide a copy to IDOA.

## **X. MAINTENANCE OF STATE-OWNED HOUSING**

It is the joint responsibility of both the staff person assigned to the state-owned residence and the agency commissioner or director or designee to ensure that the value of the state-owned residence is maintained and kept in an acceptable living condition. Consideration must be given to the fact that it is state-owned property and must present an appearance acceptable to the citizens of the State of Indiana. The responsibilities of the staff person and the agency shall be identified in the rental agreement.

When a state-owned residence is vacant, the responsible agency or designee shall continue to inspect the vacant residence to ensure that minimal deterioration takes place in the residence during the period of vacancy.

If a state-owned residence is determined to be of no use to the State or the agency, a written request for alternative use or razing shall be completed and submitted to IDOA.

All repairs, renovations or additions in excess of \$500.00 must be processed through the agency commissioner or director and the agency controller with subsequent approval by the IDOA, if necessary. Additionally, the agency or tenant shall not enter into any service contract or preventive maintenance agreement for any of the operating systems that are contained within the state-owned residence without the prior approval of the agency and IDOA.

## **XI. EMERGENCY REPAIRS TO STATE-OWNED RESIDENCES**

In cases of emergency or when prior authorization from the agency is not possible due to holidays or other situations occurring after normal business hours, the facility shall initiate necessary repairs. The agency commissioner or director or designee shall notify designated

persons within the agency and the agency controller on the next business day as to the need for the repairs and the estimated cost.

## **XII. LEASE AGREEMENT**

The IDOA approved State of Indiana Residential Lease shall be utilized as the rental agreement executed between staff and the appropriate agency. The purpose of the lease agreement is to protect the interests of both staff and the agency and the State of Indiana. The lease agreement shall be executed prior to the staff person being authorized to occupy the state-owned residence. All staff currently in state-owned residences shall be required to execute this agreement in accordance with these administrative procedures.

All lease terms shall be written to align with the State fiscal year (i.e., July 1 through June 30). Staff who are authorized to reside in a state-owned residence during the fiscal year shall have the lease term written from the date that the staff person is authorized to reside in the state-owned residence until the following June 30.

All leases will be considered new, one (1) year leases even if the same tenant resides in the house for subsequent years. The lease shall commence upon the date that the staff person moves into the residence and shall continue until the termination date of the lease or until terminated sooner, if necessary and in accordance with these administrative procedures and the lease agreement.

## **XIII. ANNUAL REVIEW OF HOUSING ASSIGNMENTS**

The responsible agency shall review the roster of occupants of the state-owned residences at the agency's facility or facilities on an annual basis. The designated person within the agency is to determine if housing assignments are appropriate and in accordance with these procedures and shall determine whether the assignment of the occupants continues to be appropriate. If the parties determine that a housing assignment is no longer appropriate or in accordance with these administrative procedures, the designated agency representative shall be instructed to advise the occupant that he/she will be required to vacate state-owned residence in accordance with these administrative procedures.

Each responsible agency is required to forward the report of the state-owned residence reviews from the facilities and the agency recommendations to the IDOA **by July 1, on an annual basis**, using the justification form attached to this Policy as Attachment I. The annual report to the IDOA will contain the following information:

- (1) An inventory of all housing units under the authority of the agency, which are to be recorded by unit number and/or address.



- (2) A statement of use for each housing unit. If rented, this statement of use would be the tenant's name and employee classification.
- (3) For those units that are being rented, include the monthly rental rate.
- (4) Justification (based on this policy) for each Employee placement.

The agency will cooperate with the IDOA in the preparation of a Statewide Housing Inventory.

#### **XIV. RENT DETERMINATION**

It is the responsibility of the agency to determine the appropriate monthly rental rate for state-owned residences under its jurisdiction based upon the formula provided by the IDOA. (See Attachment III: IDOA Housing Survey.) Rental rates shall not be based upon salary.

Rental rates shall be reviewed annually to determine appropriateness. The review of the rental rates shall be conducted at the same time that the housing assignment is reviewed. If the rental rate is to be modified, the modification shall be incorporated into the next lease agreement and the staff person shall be advised of the modification.

It shall be the responsibility of the responsible agency to ensure that all necessary documents are completed to initiate and continue the collection of rents on all state-owned housing occupied at the agency's facility. All rent payments shall be made through bi-weekly payroll deductions as authorized through properly executed forms approved by the State Board of Accounts and Auditor of State. (See Attachment IV: State Form AS-47.) Tenant shall cooperate with the agency to execute all necessary forms for payment of rent prior to occupancy of the state-owned residence. Cancellation of the payroll deduction shall be considered a notice to vacate the premises.

#### **XV. HOUSEHOLD EQUIPMENT**

It shall be the responsibility of the staff person to provide all household appliances that are considered a convenience (i.e., washer, dryer, freezer, microwave oven, automatic dishwasher, blenders, can openers, etc.). As refrigerators, kitchen stoves, and HVAC systems are considered a necessity, the agency shall provide these items.

A household appliance that ensures the preservation and maintenance of the existing structure, equipment and utility systems at the housing unit shall be considered a necessary expense (i.e., water softener). These items shall be purchased and maintained at state expense.



Any convenience household appliance currently supplied by the state in a state-owned residence shall be maintained in the unit. Such appliances supplied by the state shall be eliminated pursuant to statute, through attrition, breakage or vacating of the premises by the staff person. Nothing in these procedures is to be construed as to cause the removal of these appliances upon the effective date of these procedures.

The agency shall maintain a current and accurate inventory of all state-owned furnishings, fixtures, equipment, appliances and other non-affixed state-owned property that is in each state-owned residence at the facility. (See Attachment V: Inventory of State-Owned Furnishings in State Housing Units.)

**XVI. REMOVAL FROM STATE HOUSING**

During the period when a staff person is assigned a state-owned residence, it may become necessary to request that the staff person and family vacate the unit. The reason for such a request may be the termination of employment or change of position by the staff person, disciplinary actions, and the death of the staff person, the total or partial destruction of the state-owned residence or for the best interests of the agency. If staff is requested to leave the state-owned residence, the designated agency representative shall ensure that the staff is given written notice indicating the reason(s) they are being asked to leave and the date they are to vacate the premises.

The length of time staff is given to vacate a state-housing unit is 30 (thirty) calendar days. If this time frame is not sufficient, agency leadership shall provide justification for extending time to vacate. In all cases, the IDOA shall be notified when a request to vacate a state-owned residence is given to a staff person.

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<b>APPROVED:</b>	<u><i>Rebecca Holwerda</i></u>	<u>09/01/22</u>
	<b>Dr. Rebecca Holwerda, Commissioner</b>	<b>Date</b>

**ATTACHMENT I**  
**INFORMATION REQUIRED IN JUSTIFICATION**  
**FOR STATE HOUSING**

The following information must be included in any request for an assignment to state housing. Additionally, this information must be submitted on an annual basis with the lease agreement.

1. Residence number or address.
2. The position classification and working title, if different, of the staff person assigned to or proposed for assignment to the residence.
3. Specific job duties of the staff person's position that indicate that state housing is necessary for the safety/security or emergency maintenance of the facility or the protection of state-owned property.
4. Indicate whether the position is on a 24 hours, 7 days per week schedule or some other schedule.
5. Indicate any other duties (such as job title/description) that would show why this position is necessary for the operation of the facility and is required in the case of emergencies.
6. Indicate how often this position is called into the facility during off-duty hours to respond to emergency situations or the likelihood that the position will be called into the facility to respond to an emergency



**ATTACHMENT II**

**Agency**

**RESIDENCE INSPECTION REPORT**

FACILITY \_\_\_\_\_ ADDRESS \_\_\_\_\_

RESIDENT \_\_\_\_\_ DATE \_\_\_\_\_

<b>Category</b>	<b>OK</b>	<b>Comments</b>
<b>Electrical (Outlets, switches, etc.)</b>		
<b>Plumbing (fixtures, drains, etc.)</b>		
<b>Windows and screens</b>		
<b>Ceilings, walls and floors</b>		

<b>Doors and locks</b>		
<b>Counters and Cabinets</b>		
<b>Smoke detectors</b>		
<b>Garage, sidewalks and driveway</b>		
<b>Firearms and ammunition storage</b>		

**ATTACHMENT III**  
**INDIANA DEPARTMENT OF ADMINISTRATION HOUSING SURVEY**

The theory behind this pricing formula is that all houses are assessed a like number of points based on four main factors – Basic Structure, Property Extras, Appliances, and Desirability. There are subcategories within each of the main factors. The concept is to come up with a total point value for each house and apply rates based on the total point value of the house. The point value of any one factor in relation to another can be changed if it is felt one factor or another is too heavily rated. All areas on the survey sheets not addressed below are purely for identification or general information purposes only and do not have an effect on the total assessed point value of the house. The point values assigned to the various factors were set by an internal group consisting of members from IDOA, DNR, DOC, and FSSA.

1. **BASIC STRUCTURE** - The theory behind rating this factor basically comes from house appraisal textbooks and forms.

A. Approximate Age \_\_\_\_\_ 100 - Age = \_\_\_\_\_

Generally the older the house the more likely it is to be run down, in need of repairs and possibly less appealing. The age of the house is subtracted from 100 so that the older the house the less points charged. Any houses over 100 years old were assessed "0" points.

B. Living Area \_\_\_\_\_ Sq. Ft. X .1 = \_\_\_\_\_

The square footage is taken on the actual living space available on the inside of the house. Closets, bathrooms, hallways, unfinished basements, and utility rooms are not included. Actual room measurements used are shown on the backside of the survey sheet. The total is multiplied by .1 to reduce the impact of the point value.

C. No. of Rooms \_\_\_\_\_ X 15 = \_\_\_\_\_

The more rooms in the house the more points assessed. This does not include bathrooms, unfinished areas of basements, and utility rooms.

D. Bedrooms \_\_\_\_\_ X 30 = \_\_\_\_\_

Generally, the more bedrooms in a house the greater the value.

E. Baths \_\_\_\_\_ X 30 = \_\_\_\_\_

Generally, the more bathrooms the greater the value the house has on the open market.

2. **PROPERTY EXTRAS**

A. Garage Yes + 15 / No -5

B. Basement (Functional) Yes + 15 / No - 5  
(Non-Functional) + 0 /

The non-functional basement category was added to reduce the assessment for those houses with basements that were only big enough for a furnace and water heater or were wet to the point they could not really be used.

C. Central Air Yes + 20 / No 0

D. Fireplace Yes + 20 / No 0

These qualities are given extra points because of the added comfort and/or aesthetic value given to the house.

E. Patio Yes + 15 / No -5

F. Porch Yes + 15 / No -5

G. Out Building Yes + 15 / No -0

Point assesses if an additional building is provided for additional storage of personal belongings.

3. APPLIANCES

Points were assessed for state-owned appliances in that they are a benefit to the resident. It should be noted that only a few houses have any state-provided appliances.

4. DESIRABILITY

This is an attempt to measure the personal desirability of the house.

A. Quality of Construction

B. Condition of Property

C. Closets and Storage

D. Accessibility to Shopping

The number of miles to the nearest major grocery store should be used. Generally, the points should be assessed based on the following scale: Excellent = 0-5 miles to the nearest major grocery store; Good = 5-10 miles; Average = 10-15 miles; Fair = 15-20 miles, and Poor 20-25 miles.

E. Privacy

Generally, housing is provided so those employees are available and readily accessible for security and/or emergencies reasons. This factor should be graded negatively if the house is highly visible in a high use area of the property. In contrast, if the house is hidden from the view of the general public or located away from the high use area, points should be assessed.

5. MISCELLANEOUS

A. Exterior

Points assessed based on appearance and general value associated with the type of exterior facing used on the house.

B. Sewage

Points assessed based on perceived assumption that a sewage system is better than a septic tank.

C. Water

Points assessed based on perceived assumption that water from a water system is better than a well.

D. Heating

Based on the theory that gas and oil (even though not a clean heat) produces a better heat than electricity. Wood should be scored lower because of the labor required to maintain the heat.



**Department of Administration Housing Survey**

Agency and Facility \_\_\_\_\_ Date: \_\_\_\_\_

UNIT # \_\_\_\_\_ POINT VALUE

<u>DESIRABILITY</u>	<u>EXC.</u>	<u>GOOD</u>	<u>AVG.</u>	<u>FAIR</u>	<u>POOR</u>	
QUALITY OF CONSTRUCTION	40	32	24	16	8	_____
CONDITION OF PROPERTY	40	32	24	16	8	_____
CLOSETS & STORAGE	25	20	15	10	5	_____
ACCESSABILITY TO SHOPPING	25	20	15	10	5	_____
PRIVACY	40	20	0	-20	-40	_____
						TOTAL DESIRABILITY _____

MISCELLANEOUS

EXTERIOR

BRICK 25 STONE 25 ALUM. SIDING 15 WOOD 10 OTHER \_\_\_\_\_

SEWAGE

CITY 20 CENTRAL SYSTEM 15 SEPTIC 10 OTHER \_\_\_\_\_

WATER

CITY 20 CENTRAL SYSTEM 15 WELL 10 CISTERN 10 TRUCKED IN 5 OTHER \_\_\_\_\_

HEATING

GAS 25 OIL 20 ELECTRIC 15 WOOD 10 OTHER \_\_\_\_\_

TOTAL MISCELLANEOUS \_\_\_\_\_

STYLE

ROOF \_\_\_\_\_ FLOOR COVERING \_\_\_\_\_

PLUMBING \_\_\_\_\_ INTERIOR WALLS \_\_\_\_\_

ROOM DIMENSIONS FOR LIVING AREA

LIVING ROOM	_____ FT	X _____ FT	= _____ SQ FT
KITCHEN	_____ FT	X _____ FT	= _____ SQ FT
BEDROOM # 1	_____ FT	X _____ FT	= _____ SQ FT
BEDROOM # 2	_____ FT	X _____ FT	= _____ SQ FT
BEDROOM # 3	_____ FT	X _____ FT	= _____ SQ FT
BEDROOM # 4	_____ FT	X _____ FT	= _____ SQ FT
DINING ROOM	_____ FT	X _____ FT	= _____ SQ FT
FAMILY ROOM	_____ FT	X _____ FT	= _____ SQ FT
OTHER	_____ FT	X _____ FT	= _____ SQ FT
TOTAL LIVING AREA			_____ SQ FT







State-Owned Housing Policy

651- 700	95	43.85
601- 650	90	41.54
551- 600	85	39.23
501- 550	80	36.92
451- 500	75	34.62
401- 450	70	32.31
351- 400	65	30.00
301- 350	60	27.69
251- 300	55	25.38
201- 250	50	23.08
151- 200	45	20.77
101- 150	40	18.46
51- 100	35	16.15
1- 50	30	13.85
TRAILER PADS	25	



**ATTACHMENT V**

<b>FACILITY:</b>		
<b>Inventory of State-Owned Furnishings in State Housing Units</b>		
<b>UNIT:</b>	<b>DATE:</b>	<b>VERIFIED BY:</b>
<b>OCCUPANT(S):</b>		

QTY	DESCRIPTION	LOCATION	CONDITION

