

REQUEST FOR PROPOSALS
FAIRFAX COUNTY
REQUEST FOR PROPOSALS FOR
HOME CHDO AFFORDABLE HOUSING PROJECTS
FY 2011-2012

The Fairfax County Department of Housing and Community Development (HCD) announces the availability of funds under the federal Home Investment Partnerships (HOME) Program. Project proposals are being solicited to construct, acquire, or rehabilitate affordable housing.

Preference will be given to projects meeting one or more of the following criteria:

- Include preservation and acquisition of affordable housing; and/or
- Result in affordable housing that is accessible to disabled persons; and/or
- Serve extremely low income households (at or below 30% Area Median Income (AMI))
- Incorporate Fairfax County's Consolidated Plan and Housing Blueprint objectives
- Support Fairfax County's Housing First initiative which provides people who are homeless permanent housing first, along with supportive services, instead of placing them into shelters
- Provide beneficiaries with direct access to public transportation and/or community retail centers and/or supportive services; and/or
- Projects that can be completed by the applicant within a 12 month timeframe upon receipt award funds.

Up to \$ 1.2 million in HOME Community Housing Development Organization (CHDO) set-aside funds is available under this Request For Proposals, subject to the final HOME grant amount as approved by Congress and distributed by HUD. An application will be available online no later than Friday, March 4, 2011 at: <http://www.fairfaxcounty.gov/rha/chdorfp/fy2011.htm>. In addition, CHDO operating funds may be provided to awardees under this RFP.

ELIGIBLE APPLICANTS: Eligible applicants are nonprofit corporations who have been officially certified as a Fairfax County Community Housing Development Organization CHDO by the Fairfax County Department of Housing and Community Development for FY 2011 (July 1, 2010-June 30, 2011); or can either meet or can reasonably be expected to meet the criteria of the federal HOME regulations for a CHDO¹ in response to this RFP. For applications submitted by any nonprofit organizations that have not been certified as a Fairfax County CHDO for FY 2011, any such application cannot be recommended for final approval until the organization has successfully applied for and received this certification. CHDO certification applications will be accepted along with this RFP. See the CHDO Checklist (Appendix 5) for a full description of HOME CHDO criteria and required documentation.

Applications are to be received no later than 4:00 p.m., Tuesday, March 29, 2011 at the 1st Floor Reception Desk, Fairfax County Department of Housing and Community Development, 3700 Pender Drive, Fairfax, VA 22030. An original and four copies are to be submitted. **NOTE: A pre-bid conference will be held in the DHCD Center, 1st Floor (3700 Pender Drive, Fairfax) from 3:00 p.m. – 4:00 p.m. on Monday, March 14, 2011. Please contact Kehinde Powell, Grants Management Division at 703-246-5117 with any questions related to this RFP.**

Fairfax County is committed to a policy of nondiscrimination in all County programs, services and activities and will provide reasonable accommodations upon request. To request special accommodations call 703-246-5101 or TTY 703-385-3578.



¹ HOME Definition of CHDO, 24 CFR § 92.2 (www.hud.gov/offices/cpd/affordablehousing/lawsandregs/regs/finalrule.pdf).

INTRODUCTION: APPLICATION GUIDELINES

PURPOSE: AFFORDABLE HOUSING PROJECTS

The Fairfax County Department of Housing and Community Development (HCD) is announcing the availability of funds provided to Fairfax County under the HOME program administered by the U.S. Department of Housing and Urban Development (HUD). The funds are available to eligible non-profit applicants for the purpose of preserving, improving, or developing HOME-eligible affordable housing in Fairfax County.

FUNDS AVAILABLE

Up to \$1.2 million is available for HOME Community Housing Development Organization (CHDO) funds based on the federal requirement to set aside at least 15% of the county's annual funding under the HOME Program for CHDO-eligible activities. In addition, CHDO operating assistance may be provided to awardees under this RFP.

AWARD OF FUNDS

All applications will first be subject to preliminary screening by HCD for completeness and minimum requirements. A Selection Advisory Committee, to be appointed by the Director of HCD, will review those deemed complete. Preliminary selection(s) will be made based on the extent to which the proposal(s) meets the evaluation criteria. The proposal(s) selected and recommended for final award will be subject to approval by the Fairfax County Board of Supervisors (Board). Applicants will be notified of the recommended award(s) and final award(s) approved by the Board. A contract(s) between the FCRHA and the funded applicant(s) must be executed prior to any disbursement of funds.

The following is a description of options HCD may pursue should it not receive enough proposals that satisfactorily meet the evaluation criteria. HCD may: 1) award additional funds for the proposals submitted under this RFP based on project needs and number of affordable units or; 2) HCD may consider, on a first come, first serve basis, unsolicited proposals; or 3) informally solicit proposals as opportunities are identified to fully utilize available funding for preservation of additional units.

If no application meets the selection criteria, the county reserves the right to fund no applications in this round of funding, or to reopen the period for submission of proposals indefinitely.

MINIMUM REQUIREMENTS

In order for a project/proposal to receive consideration, it must meet the following minimum requirements:

1. The purpose of the proposal is to use CHDO set-aside funds to finance a CHDO-eligible project which, upon completion, will be occupied by HOME income-eligible households.
2. The proposal is submitted by the deadline.
3. The applicant is an eligible CHDO, as stated above.
4. The project to be financed with CHDO set-aside funds is located in Fairfax County (including the Participating Jurisdictions of the Towns of Clifton, Vienna, and Herndon and the City of Fairfax).
5. The project will not result in the permanent displacement of any households or other entities.
6. Worksheet #1 of the Application is completed **and signed**.

- The proposal cannot be for an expansion or improvement of a county-owned facility or other publicly owned residential facility.

ELIGIBLE ACTIVITIES AND PROJECT REQUIREMENTS OF THE HOME PROGRAM

In order to be considered for funding, all proposed projects must be considered eligible under the requirements of the HOME Final Rule, including provisions pertaining to CHDO-specific affordable housing activities:

“CHDOs, as owners, must hold title to or have a long term lease in a given housing property. Additionally, a CHDO developer may own and develop a property or have a contractual obligation to a property owner to develop a project. Finally, a CHDO sponsor develops a project that it solely or partially owns and agrees to convey ownership to a second nonprofit that retains ownership for the purpose of providing affordable housing to low-income renters. The distinction between being a sponsor and a developer is that CHDO sponsors have an ownership interest in the property prior to the development phase and then transfers title to another legally and financially separate nonprofit at a pre-determined time. The CHDO sponsor must provide sufficient resources to the second nonprofit organization to ensure the completion of the development and long-term operation of the project.”²

ELIGIBLE CHDO ACTIVITIES	ELIGIBLE CHDO SET ASIDE ACTIVITIES		
	CHDO Developer	CHDO Sponsor	CHDO Owner
Acquisition/rehabilitation of rental housing.	X	X	X
New construction of rental housing.	X	X	X
Acquisition/rehabilitation of homebuyer properties.	X	X	X
New construction of homebuyer properties.	X	X	X
Direct financial assistance (i.e. downpayment and closing costs) to purchasers of HOME-assisted homebuyer housing owned, sponsored or developed by a CHDO with HOME funds.	X	X	X

HOME Eligible Activities (24 CFR § 92.205)

The housing must be permanent or transitional housing, including permanent housing for disabled persons, homeless persons and single-room occupancy housing.

- Acquisition (including assistance to first-time homebuyers purchasing units that are owned, sponsored or developed by the Applicant with HOME funds)
- New construction
- Reconstruction
- Rehabilitation of non-luxury housing with suitable amenities
- Site improvement
- Conversion
- Demolition

Conversion of an existing structure to affordable housing is considered rehabilitation, unless the conversion entails adding one or more units beyond the existing walls, in which case, the project is new construction under HOME federal regulations.

Acquisition of vacant land or demolition must be undertaken only with respect to a particular housing project intended to provide affordable housing, and for which funds for construction have been committed.

² Source: HOMEfires, Vol. 2, #1 (www.hud.gov/offices/cpd/affordablehousing/library/homefires/volumes/vol2no1.cfm).

Housing that has received an initial certificate of occupancy or equivalent document within a one-year period before the county commits HOME funds to the project is new construction under the HOME federal regulations.

- A. **Income targeting:** The project must meet income targeting requirements for housing units assisted under this RFP (See Appendix 4, Income Limits), as follows:
- **Rental Housing:** not less than 90 percent of the families receiving such assistance are families whose annual income does not exceed 60 percent of the area median income (AMI) at the time of occupancy or at the time that the funds are invested, whichever is later. The remaining families receiving such assistance must be households with incomes at or below 80 percent of AMI.
 - **Homeownership Housing:** all HOME funds must benefit families at or below 80 percent of the Washington, DC AMI, as determined by HUD and adjusted for household size.
- B. **Minimum per-unit subsidy:** Federal HOME regulations require that the minimum amount of HOME funds that must be invested in a project involving rental housing or home ownership is \$1,000 times the number of affordable units in the project.
- C. **Maximum per-unit subsidy:** The amount of HOME funds that the county may invest on a per-unit basis in affordable multi-family housing may not exceed the per-unit dollar limits as Home Maximum Per Unit Subsidy Limits or 221(d)(3).
- D. **Maximum Mortgage Limits:** Where HOME funds are used to finance homeownership units, the purchase price cannot exceed the limits shown in Appendix 2, Home Maximum Mortgage Limits.
- E. **Rent limitations:** The HOME-assisted units in a rental housing project must be occupied only by households that are eligible as low-income families, and must have rents that do not exceed those outlined in Appendix 3, Rent Limitations.
- F. **Period of Affordability:** HOME regulations require that assisted units remain affordable at a minimum from 5 years to 20 years, depending on the type of activity as well as the amount of HOME subsidy. The affordability period will be determined as a part of underwriting project assistance and will be included in the terms and conditions of the contract with the applicant and may exceed the minimum required under HOME regulations. FCRHA typically requires a 30 year affordability period.
- G. **Eligible Costs (24 CFR §§ 92.206 and 92.301):**
- 1) **Development hard costs.** The actual cost of constructing or rehabilitating all housing types, including mixed use and mixed income developments, ownership or rental housing and special needs housing.
 - 2) **Acquisition costs.** Costs of acquiring improved and unimproved real property, including acquisition for homeownership.
 - 3) **Related soft costs.** Other reasonable and necessary costs incurred by the owner and associated with the financing or development (or both) of new construction, rehabilitation, or acquisition of housing assisted with HOME funds, i.e., architectural, engineering, permits, financing, developer and legal fees, as well as working capital and closing costs.
 - 4) **Relocation costs.** Costs of relocation payments and other relocation assistance for **temporarily** displaced individuals, families, businesses, and organizations. *Projects involving permanent relocation will not be considered for funding.*
 - 5) Applications requesting HOME funds to cover expenses related to project-specific technical assistance, site control and seed money and project feasibility studies will be considered and evaluated on a case-by-case basis.
 - 6) Tenant-based rental assistance (TBRA) is **not** an eligible cost under this RFP. This RFP includes funds set aside for eligible HOME development activity by non-profit

GENERAL PROJECT REQUIREMENTS

- A. Targeted Beneficiaries: The HOME Program is designed to assist housing projects that serve low-income households ranging from the homeless to first time homebuyers, consistent with the needs and priorities identified in the Annual Action Plan: FY 2011. The Annual Action Plan is available from the County on the website at www.fairfaxcounty.gov/rha. Click on Consolidated Plan.
- B. Awards will take the form of loans or deferred trusts.
- C. In certain cases, prior to award, a preliminary or firm financing commitment from a private lender or other financing source may be required.
- D. Applications must be for specific projects located in Fairfax County. To the extent feasible, applications should be site specific. Evidence that the proposed development is permitted under existing zoning and other development-related documentation may be required.
- E. Preliminary site plans and schematics for new construction, engineering reports for rehabilitation, preliminary market justification, and appraisals are expected to be complete at the time of application.
- F. An independent market analysis may be required, as well as a recent tenant survey detailing the socio-economic characteristics of current tenants, particularly in the case of acquisition and/or rehabilitation projects.
- G. An environmental review must be completed for any project funded with federal funds *prior* to the commitment of funds to the project. Rehabilitation or new construction projects may be subject to the wage and hour requirements of the Davis-Bacon Act, as well as the accessibility requirements under 24 CFR part 8, which implements Section 504 of the Rehabilitation Act of 1973.
- H. Projects that involve temporary relocation must meet the requirements of the Uniform Relocation Assistance and Real Property Acquisition Policies Act of 1970. (**Projects requiring permanent relocation will not be considered for funding.**)
- I. Acquisition and/or renovation of existing housing are also subject to lead based paint (LBP) testing (particularly units built prior to 1978). Depending on age of the structure(s), scope of work, and type of work, LBP testing can vary in extent and need as mandated by HUD.³
- J. Until funds are completely disbursed, successful applicants **that have not already been certified as a Fairfax County CHDO** will be required to provide an annual audit of its financial statements and auditor's opinion and management letter, if issued. Audits must be conducted by an independent licensed certified public accountant. Applicants should note that an A-133 audit is required by Federal regulations if total federal dollars expended by the applicant in any fiscal year of the organization exceeds \$500,000.

DISBURSEMENT OF FUNDS

Funds will be disbursed only at the time all conditions of the award have been met by the applicant, which include all requirements and CHDO certification current to the time at which the application was submitted. Disbursement of funds under this RFP is subject to: execution of a contract between the applicant and the Fairfax County Redevelopment and Housing Authority;

³ See HOME Front for further guidance on HOME and the Lead Safe Housing Rule:
<http://www.hud.gov/offices/cpd/affordablehousing/training/web/leadsafe/>.

local program requirements; a deed of trust, loan, or partnership agreement; and/or any other appropriate additional legal documentation as required, and environmental clearance.

The contract execution may be delayed up to two months for all conditions of the award to be met and that may be extended. Where the applicant has failed to meet the conditions of the award within the allotted time, the award may be revoked and the funds allocated may be deobligated and reprogrammed to other projects by the Board. The funds must be expended in full accordance with the contract and deferred trust or loan agreement with the applicant. It is expected that funds will be expended and the project completed within a maximum of 24 months from execution of the contract and deferred trust or loan agreement with the applicant.

CONFLICT OF INTEREST

The Fairfax County Redevelopment and Housing Authority (RHA) prohibits the loan of county funds to any nonprofit entity found to be in violation of any of the following conflicts of interest:

1. No member of the CHDO Board of Directors, or any other staff person employed by the CHDO, may serve as the Realtor brokering any real estate transaction between the CHDO and a third-party seller.
2. No owner, developer or sponsor of a project assisted with HOME funds (or officer, employee, agent, elected or appointed official or consultant of the owner, developer or sponsor) whether private, for-profit or non-profit including a community housing development organization (CHDO) when acting as an owner, developer or sponsor) may occupy a HOME-assisted affordable housing unit in a project. This provision does not apply to an individual who receives HOME funds to acquire or rehabilitate his or her principal residence or to an employee or agent of the owner or developer of a rental housing project who occupies a housing unit as the project manager or maintenance worker.⁴
3. If a CHDO board includes any member or members who are also Fairfax County Department of Housing and Community Development (HCD) employees, any such employees must recuse themselves from any aspect of the annual Fairfax County CHDO RFP review and selection process so as to avoid the appearance of conflict of interest and the perception of favoritism on the part of HCD toward any individual CHDO.



⁴ Certain requests for exceptions may be approved, per the criteria of the HOME Final Rule (24 CFR § 92.356(f)(2)).

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APPENDIX 1
Consolidated Plan Housing Objectives

Specific Housing Objectives

The table below shows the specific objectives to meet the four goals outlined in Appendix 2.

Objective Number	Objective Description
1	Provide housing units affordable to homeless individuals and families
2	Provide housing units affordable to persons with physical or mental disabilities, including persons with HIV/AIDS
3	Provide housing units affordable to households with low to extremely-low incomes (<50 percent MFI) and other special needs populations
4	Provide sufficient workforce housing through land use policy
5	Provide sufficient workforce housing through private sector partnerships
6	Preserve existing Public Housing
7	Promote resident self-sufficiency
8	Foster coordination and partnerships

Source: Fairfax County Approved Consolidated Plan for Fiscal Years 2011-2015.

APPENDIX 1A

Housing Blueprint and Consolidated Plan Goals

On January 26, 2010, the Fairfax County Board of Supervisors adopted a “Housing Blueprint”⁶, which establishes the county’s affordable housing policy direction for FY 2011 and beyond. The Housing Blueprint reflects the philosophy of the Board that affordable housing is a continuum ranging from the needs of the homeless to first-time homebuyers. The goals and priorities needs set forth in the Housing Blueprint and this Consolidated Plan were the product of the input gathered through the process of bringing together County officials and staff, representatives from the non-profit community and for-profit development sector, and the citizens of Fairfax County and supplemented by data compiled from local sources, HUD, and the U.S. Census.

The housing goals established for the next 10 years in the Housing Blueprint drive the Consolidated Plan for FY 2011-2015 and are as follows:

Goal 1: To end homelessness in 10 years

Goal 2: To provide affordable housing options to those with special needs

Goal 3: To reduce the waiting lists for affordable housing by half in 10 years

Goal 4: To produce workforce housing sufficient to accommodate projected job growth

To accomplish these goals, Fairfax County will draw upon the community and private sector to leverage resources through partnerships. The County will complete projects already in the pipeline as well as embark on new initiatives.

Consistent with the Housing Blueprint, the philosophy driving the priority needs in this Five-Year Plan is that affordable housing is a continuum ranging from the needs of the homeless to first-time buyers. Included in this range are the diverse housing needs of hard-working, but low paid families; senior citizens; persons with physical or mental disabilities; and the workforce across Fairfax County.

The consensus among the parties establishing the housing priorities for the next 10 years is that affordable housing priorities have changed and that the emphasis should shift to those with the greatest need. Those identified as having the greatest need include:

- 1) Individuals and families who are homeless;
- 2) Households with low- to extremely low-incomes;
- 3) Special needs populations including persons with physical or mental disabilities and seniors; and
- 4) The workforce essential to Fairfax County’s economic health and growth.

APPENDIX 2

HOME MAXIMUM MORTGAGE LIMITS Effective April 2010 through April 2011

Washington, DC HUD Field Office	One-family	Two-family	Three-family	Four-family
Fairfax County, VA	\$362,790	\$464,449	\$561,411	\$675,000

Source: HUD FHA Maximum Single Family Mortgage Limits (<https://entp.hud.gov/idapp/html/hicostlook.cfm>).

APPENDIX 4

RENT LIMITATIONS Effective May 2010 through May 2011

FEDERAL FY 2010 HOME PROGRAM RENTS FOR FAIRFAX COUNTY

	EFFC	1 BDRM	2 BDRM	3 BDRM	4 BDRM	5 BDRM	6 BDRM
Low HOME Rent Limit (50% of AMI or below)	\$906	\$970	\$1,165	\$1,345	\$1,501	\$1,656	\$1,811
High HOME Rent Limit (80% of AMI or below)	\$1,061	\$1,188	\$1,364	\$1,641	\$1,811	\$1,980	\$2,148

Source: U.S. Department of Housing and Urban Development District of Columbia Field Office:
Washington, D.C. Metropolitan Statistical Area 2010 HOME Program Rents

APPENDIX 5

Income Limits Effective April 2010 through April 2011

FEDERAL FY 2010 HOME PROGRAM INCOME LIMITS FOR FAIRFAX COUNTY

Persons	30% Limits (Extremely Low- Income)	50% Limits (Very Low- Income)	60% Limits (Low-Income)	80% Limits
1	\$21,750	\$36,250	\$43,500	\$45,100
2	\$24,850	\$41,400	\$49,680	\$51,550
3	\$27,950	\$46,650	\$55,920	\$58,000
4	\$31,050	\$51,750	\$62,100	\$64,400
5	\$33,550	\$55,900	\$67,080	\$69,600
6	\$36,050	\$60,050	\$72,060	\$74,750
7	\$38,550	\$64,200	\$77,040	\$79,900
8	\$41,000	\$68,350	\$82,020	\$85,050

Source: U.S. Department of Housing and Urban Development District of Columbia Field Office:
Washington, D.C. Metropolitan Statistical Area 2010 HOME Program Income Limits

APPENDIX 6

CHDO CHECKLIST

The information contained in this checklist refers to the definition of Community Housing Development Organizations (CHDOs) in Subpart A, Section 92.2 of the HOME Final Rule, which is available online:

www.hud.gov/offices/cpd/affordablehousing/lawsandregs/regs/finalrule.pdf.

Applicants for HOME funding that have not been certified as a Fairfax County CHDO for the 2011 Fiscal Year will be required to submit CHDO documentation indicated in the checklist, which must be reviewed and approved by HCD staff before award of HOME funds or execution of a contract.

I. LEGAL STATUS

- A. The nonprofit organization is organized under State or local laws, as evidenced by:
___ a Charter, or
___ Articles of Incorporation.
- B. No part of its net earnings inure to the benefit of any member, founder, contributor, or individual, as evidenced by:
___ a Charter, or
___ Articles of Incorporation.
- C. Has a tax exemption ruling from the Internal Revenue Service (IRS) under Section 501 (c) of the Internal Revenue Code of 1986, as evidenced by:
___ a 501 (c) Certificate from the IRS.
- D. Has among its purposes the provision of decent housing that is affordable to low-income people, as evidenced by a statement in the organization's:
___ Charter,
___ Articles of Incorporation,
___ By-laws, or
___ Resolutions.

II. CAPACITY

- A. Conforms to the financial accountability standards of 24 CFR § 84.21 (Standards for financial management systems), as evidenced by:
___ a notarized statement by the president, or chief financial officer of the organization;
___ a certification from a Certified Public Accountant, or
___ a HUD approved audit summary.

- B. Has a demonstrated capacity for carrying out activities assisted with HOME funds, as evidenced by:
- resumes and/or statements that describe the experience of key staff members who have successfully completed projects similar to those to be assisted with HOME funds, or
 - contract(s) with consultant firms or individuals who have housing experience similar to projects to be assisted with HOME funds, to train appropriate key staff of the organization.
- C. Has a history of serving the community where housing to be assisted with HOME funds will be used, as evidenced by:
- a statement that documents at least one year of experience in serving the community, or
 - for newly created organizations formed by local churches, service or community organizations, a statement that documents that its parent organization has at least one year of experience in serving the community.

The CHDO, or its parent organization, must be able to show one year of serving the community from the date the participating jurisdiction provides HOME funds to the organization. In the statement, the organization must describe its history (or its parent organization's history) of serving the community by describing activities which it provided such as, developing new housing, rehabilitating existing stock and managing housing stock, or delivering non-housing services that have had lasting benefits for the community, such as counseling, food relief, or childcare facilities. The statement must be signed by the president of the organization or by a HUD approved representative.

III. ORGANIZATIONAL STRUCTURE

- A. Maintains at least one-third of its governing board's membership for residents of low-income neighborhoods, other low-income community residents, or elected representatives of low-income neighborhood organizations as evidenced by the organization's:
- By-Laws,
 - Charter, or
 - Articles of Incorporation.

Under the HOME program, for urban areas, the term, "community", is defined as one or several neighborhoods, a city, county, or metropolitan area. For rural areas, "community" is defined as one or several neighborhoods, a town, village, county, or multi-county area (but not the whole state), provided that the governing board contains low-income residents from each of the multi-county areas.

- B. Provides a formal process for low-income program beneficiaries to advise the organization in all of its decisions regarding the design, siting, development, and management of all HOME-assisted affordable housing projects, as evidenced by:
- ___ the organization's By-laws,
 - ___ Resolutions, or
 - ___ a written statement of operating procedures approved by the governing body.
- C. A CHDO may be chartered by a State or local government; however, the State or local government may not appoint: (1) more than one-third of the membership of the organization's governing body; (2) the board members appointed by the State or local government may not, in turn, appoint the remaining two-thirds of the board members; and (3) no more than one-third of the governing board members are public officials, as evidenced by the organization's:
- ___ By-Laws,
 - ___ Charter, or
 - ___ Articles of Incorporation.
- D. If the CHDO is sponsored or created by a for-profit entity, the for-profit entity may not appoint more than one-third of the membership of the CHDO's governing body, and the board members appointed by the for-profit entity may not, in turn, appoint the remaining two-thirds of the board members, as evidenced by the CHDO's:
- ___ By-Laws,
 - ___ Charter, or
 - ___ Articles of Incorporation.

IV. RELATIONSHIP WITH FOR-PROFIT ENTITIES

- A. Is not controlled, nor receives directions from individuals, or entities seeking profit from the organization, as evidenced by:
- ___ the organization's By-laws, or
 - ___ a Memorandum of Understanding (MOU).
- B. A Community Housing Development Organization may be sponsored or created by a for-profit entity, however:
- (1) the for-profit entity's primary purpose may not include the development or management of housing, as evidenced:
- ___ by the for-profit organization's By-laws

AND:

- (2) the CHDO is free to contract for goods and services from vendor(s) of its own choosing, as evidenced by the CHDO's:
- By-Laws,
 - Charter, or
 - Articles of Incorporation.

FY 2011-12 HOME RFP EVALUATION CRITERIA AND APPLICATION

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Applications will be reviewed and scored based on the following four evaluation criteria. Each criterion is assigned a maximum number of points as shown below.

Criterion 1	Consolidated Plan Priorities and Targeted Populations	0 – 25 Points
Criterion 2	Project Preparation	0 – 25 Points
Criterion 3	Management Capacity and Real Estate Experience	0 – 25 Points
Criterion 4	Capacity for Project Financing and Leveraging	0 – 25 Points
TOTAL	Minimum/Maximum Points	0-100 Points

Each criterion is assigned a maximum number of points as shown. Each criterion is divided into incremental elements. Applicants could obtain points in each box if any portion of the criterion is met for that element as indicated below. The final score for each criterion will be a sum of the points awarded of all of the boxes for each element. The criteria and their respective elements are described on the following pages.

FY 2011-12 HOME RFP EVALUATION CRITERIA

1. CONSOLIDATED PLAN PRIORITIES AND TARGETED POPULATIONS

Maximum Points Possible: 25 Points

Proposal indicates the Consolidated Plan and Housing Blueprint objectives as to which the applicant's project is designed to meet. All households must be low income households (at or below 80% AMI), but proposal indicates very low (at or below 50% AMI) or extremely low income households (at or below 30% AMI) for objective #3. Extremely low-income is defined as 30% or less of AMI. Very low-income means 50% or less of AMI. Special needs are defined as persons with physical, mental, or sensory disabilities, homeless and other special needs populations, such as very low income elderly.

0 – 5	0 – 5	0 – 5	0 – 10
<p>Proposal clearly describes the targeted population to be served and explains how their needs will be served through this project.</p>	<p>Proposal clearly describes the targeted population to be served and explains how their needs will be served through this project.</p> <p>AND</p> <p>At least one of the households to be served by project will be moderate income (80% or below AMI).</p> <p>AND</p> <p>More than 50% of the population to be served by project meets at least one housing objective.</p>	<p>Proposal clearly describes the targeted population to be served and explains how their needs will be served through this project.</p> <p>AND</p> <p>At least one of the households to be served by project will be low-income (50% or below AMI).</p> <p>AND</p> <p>Project will serve special needs population.</p> <p>AND</p> <p>More than 50% of the population to be served by project meets at least two housing objectives.</p>	<p>Proposal clearly describes the targeted population to be served and explains how their needs will be served through this project.</p> <p>AND</p> <p>At least one of the households to be served by project will be extremely low-income (30% or below AMI).</p> <p>AND</p> <p>Project will serve special needs population.</p> <p>AND</p> <p>Project provides for supportive services.</p> <p>AND</p> <p>More than 50% of the population to be served by project meets two or more housing objectives.</p>

2. PROJECT PREPARATION

Maximum Points Possible: 25 Points

Proposal provides evidence that the applicant has identified (or will identify) possible sites and will likely complete the project including full lease-up, within 12 months or sooner from HCD contract execution date.

0 – 5	0 – 5	0 – 5	0 – 10
<p>Proposal identifies targeted area(s) within the areas of greatest need and indicates that project will likely be completed within 9 to 12 months from HCD contract execution.</p>	<p>Proposal identifies targeted area(s) within the areas of greatest need and indicates that project will likely be completed within 9 to 12 months from HCD contract execution.</p> <p>AND</p> <p>Proposal shows that applicant is knowledgeable about housing in proposed project area(s)/ neighborhood including extent of concentration of low-income residents and concentration of affordable housing.</p> <p>AND</p> <p>Applicant has identified a possible project site (address, tax parcel ID).</p>	<p>Proposal identifies targeted zip codes within the areas of greatest need and evidence that project will likely be completed within 6 to 9 months from HCD contract execution.</p> <p>AND</p> <p>Proposal shows that applicant is knowledgeable about housing in proposed project area(s)/ neighborhood including extent of concentration of low-income residents and concentration of affordable housing.</p> <p>AND</p> <p>Applicant has identified a possible project site (address, tax parcel ID).</p> <p>AND</p> <p>Applicant has a preliminary plan for acquisition (and rehab, if applicable).</p> <p>AND</p> <p>Primary project financing commitments have been identified.</p>	<p>Proposal identifies targeted zip codes within the areas of greatest need and evidence that project will likely be completed within 6 months from HCD contract execution.</p> <p>AND</p> <p>Proposal shows that applicant is knowledgeable about housing in proposed project area(s)/ neighborhood including extent of concentration of low-income residents and concentration of affordable housing.</p> <p>AND</p> <p>Applicant has identified a project site (address, tax parcel ID) and may have a purchase agreement.</p> <p>AND</p> <p>Applicant has a preliminary plan for acquisition (and/ rehab, if applicable) and has experience with foreclosures .</p> <p>AND</p> <p>Applicant’s first lender has provided a pre-approval letter demonstrating that applicant can likely secure additional project financing. Between the first trust and any additional equity or other financing secured by the applicant, all other non-HOME project financing sources have been identified in writing.</p>

3. MANAGEMENT CAPACITY AND REAL ESTATE EXPERIENCE

Maximum Points Possible: 25 Points

Proposal demonstrates organizational capacity to successfully complete project activities and its objective(s) and presents how the project will be accomplished within a specified time period, preferably 12 months, and maximum of 24 months. However, the project must begin within 12 months of the HOME commitment date.

0 – 5	0 – 5	0 – 5	0 – 10
<p>Proposal presents demonstrative successful track record as evidence of adequate organizational experience in owning and managing real estate. If the nonprofit applicant does not have an established track record, the organization is partnered with another nonprofit organization with applicable experience including experience with rehabilitation (if applicable).</p>	<p>Proposal presents demonstrative successful track record as evidence of adequate organizational experience in owning and managing real estate. If the nonprofit applicant does not have an established track record, the organization is partnered with another nonprofit organization with applicable experience including experience with rehabilitation (if applicable).</p> <p>AND</p> <p>Description of staff involved and their expertise as it pertains to project activities.</p> <p>AND</p> <p>Proposal presents a clear and reasonable acquisition/rehab and rental management plan including a realistic timeline through lease-up which is less than 24 months</p>	<p>Proposal presents demonstrative successful track record as evidence of adequate organizational experience in owning and managing real estate. If the nonprofit applicant does not have an established track record, the organization is partnered with another nonprofit organization with applicable experience including experience with rehabilitation (if applicable).</p> <p>AND</p> <p>Description of staff involved and their expertise as it pertains to project activities.</p> <p>AND</p> <p>Proposal presents a clear and reasonable acquisition/rehab and rental management plan including a realistic timeline, plan for lease-up within a twelve (12) month timeframe and includes a prospective source of eligible tenants.</p>	<p>Proposal presents demonstrative successful track record as evidence of adequate organizational experience in owning and managing real estate. If the nonprofit applicant does not have an established track record, the organization is partnered with another nonprofit organization with applicable experience including experience with rehabilitation (if applicable).</p> <p>AND</p> <p>Description of staff involved and their expertise as it pertains to project activities.</p> <p>AND</p> <p>Proposal presents a clear and reasonable acquisition/rehab and rental management plan including a realistic timeline, demonstrating capacity to lease-up within a nine (9) month timeframe and includes a successful process in place that is adequately described.</p>

4. CAPACITY FOR PROJECT FINANCING AND LEVERAGING

Maximum Points Possible: 25 Points

Proposal provides evidence that project financing and operating plans, if applicable, is feasible and financing sources are committed or secured. Proposal presents a clear and reasonable estimated project costs and financing and identifies additional resources other than county funds or county contributions that can help support the proposed project. (Resources may include volunteers, in-kind contributions, cash donations, goods, supplies and services donations, grants and/or contracts.) **An equity contribution from the non-profit is not required, but if contributed, the non-profit would receive a preference in funding. The project should have adequate maintenance reserves and show a positive cash flow. As an alternative, the CHDO can set aside funds in a separate reserve account for the long-term sustainability of the project.**

0 – 5	0 – 5	0 – 5	0 – 10
<p>Inadequate documentation provided to assess the financial feasibility of project. Estimated project costs and financing are not clearly described. Description of other project financing vague or non-existent.</p>	<p>Estimated project costs and financing are clearly described. Documentation identifies proposed project financing.</p> <p>Financing plans are feasible.</p> <p>AND</p> <p>Applicant shows evidence of the ability to leverage a significant amount of non-county cash for project costs. This may include soft commitments or demonstrated capacity to leverage funds.</p>	<p>Estimated project costs and financing are clearly described. Documentation identifies proposed project financing.</p> <p>Financing plans are feasible and show a positive cash flow.</p> <p>AND</p> <p>Applicant shows evidence of the <u>ability</u> to leverage a significant amount of non-county cash <u>at least 10%</u> of total for estimated project costs from all sources. This may include past grants or firm commitment of funds for project submitted under this RFP. <u>The ability to provide an equity contribution and the ability set aside funds to build adequate maintenance reserves has been demonstrated.</u></p>	<p>Estimated project costs and financing are clearly described. Documentation identifies proposed project financing.</p> <p>Financing plans are feasible and show a positive cash flow.</p> <p>AND</p> <p>Financing, other than county funds, has been committed or secured. Applicant demonstrates evidence of additional commitments of non-county financial and other material resources that are available to or attainable by the applicant and that will significantly support the project.</p> <p>Applicant shows evidence of the <u>ability</u> to leverage a significant amount of non-county cash <u>at least 20%</u> of total for estimated project costs from all sources. This may include past grants or firm commitment of funds for project submitted under this RFP. <u>An equity contribution has been specified. Evidence of adequate maintenance reserves for project has been identified.</u></p>

APPLICATION INSTRUCTIONS

Application Submission

Applications must be received for consideration of the first round of funding by the Fairfax County Department of Housing and Community Development, at the 1st floor reception desk, 3700 Pender Drive, Fairfax, Virginia 22030 by 4:00 p.m., Tuesday, March 29, 2011. Funds will be awarded for qualified proposals on a first-come, first-served basis, thereafter until all funds are allocated.

- **Late applications will not be considered in the first round of funding.** Allow extra time for hand deliveries due to traffic and building security procedures.
 - **Any application submitted with an unsigned Application Cover Sheet will not be accepted.**
1. Submissions by facsimile machine or e-mail will not be accepted.
 2. Applicants are requested to submit one original and four copies of the application along with requested worksheets and attachments for each proposed project.
 3. To maintain the application's print quality, the applicant should not use colored, textured, heavy weight or tabbed paper. Bindings should be restricted to a clip or staple. Avoid notebooks or folders requiring page perforation.
 4. Application responses should be typewritten according to the following specifications:
 - Where narrative response is requested, the written response should be in a readable font size of 12 point or larger, on single-sided white paper and limited to the number of pages indicated.
 - Where completion of worksheets is indicated, the responses should be made on the worksheets provided.
 - Narrative responses and requested attachments should be placed in the sequence indicated in the Application Components section.
 5. Attachments (other than narratives and worksheets):
 - All attachments should be on 8-½ by 11-inch white paper for submission.
 - Attachments are not subject to the page limits for narrative responses.
 6. Applicants may submit one or more project proposals; however, each proposal must be submitted separately with all requested forms and attachments.

Questions

For questions or additional information, please contact Kehinde Powell, Community Program Coordinator at 703-246-5117 at the Department of Housing and Community Development (HCD), 3700 Pender Drive, Fairfax 22030 or through the division administrative assistant at 703-246-5170 (TTY: 703-385-3578).

APPLICATION COMPONENTS

The response for each component is to be in a written narrative, on an application worksheet, and/or through an attachment as instructed in the Application Components. The application submission will begin with Worksheet #1 and end with a completed Application Checklist (Worksheet #7) and all attachments. Each of the following Application Components is to be submitted in the following sequence.

<u>COMPONENT</u>	<u>FORMAT</u>
A. Application Cover Sheet	Worksheet # 1
B. Application Summary Sheet	Worksheet # 2
C. Consolidated Plan and Housing Blueprint Priorities and Targeted Populations	Worksheet #3 and Written Narrative
D. Project Preparation	Worksheet # 4 Worksheet # 5 and Written Narrative
E. Management Capacity & Experience in Real Estate	Written Narrative
F. Capacity For Project Financing and Leveraging	Worksheet # 6 Written Narrative
G. Application Checklist	Worksheet # 7

A. Application Cover Sheet

Each application is to include an Application Cover Sheet – Worksheet # 1. Applicant's executive director or designee authorized to legally bind the applicant organization must sign each Application Cover Sheet. **NOTE: Unsigned Application Cover Sheets will result in the rejection of the application.** The total proposed funding request amount should be listed on the Application Cover Sheet. Applicants that submit jointly with other nonprofit organizations are to designate one organization as the application contact. This organization will complete and sign the Application Cover Sheet. Joint organization applications are to be indicated on the Application Cover Sheet and each participating organization is to be listed where requested.

B. Application Summary Sheet

Each application is to include an Application Summary Sheet – Worksheet # 2. The information on the Application Summary Sheet provides a snapshot of the project; the project description should be brief and to the point. Please use the space provided; do not attach additional pages.

C. Consolidated Plan and Housing Blueprint Priorities and Targeted Populations (Maximum 25 Points)

This section of the proposal describes affordable housing needs that the project will address and clearly defines the client population to be served.

1. Complete Worksheet # 3: Targeted Populations; identifying the priority household populations the applicant's project is designed to serve.
2. Provide a narrative on no more than one (1) typewritten page that lists and responds to each request for information in the order presented below. Document your source(s) of information. *Please clearly label your narrative as "C. Consolidated Plan and Housing Blueprint Priorities and Targeted Populations" and place your narrative directly after Worksheet #3.*
 - a. Describe the population, community and number to be served by the proposed project, including the type of affordable housing that will result from this project.
 - b. Does this project serve special needs populations? If yes, describe special needs population to be served.
 - c. Describe the need to be addressed and how it relates to the affordable housing goal and objective described in part 2 (a) of this question.

D. Project Preparation (Maximum 25 Points)

This section addresses status of the proposed project and whether the proposed project preserves and/or rehabilitates existing affordable units within the areas of greatest need or targeted areas as designated by Fairfax County. Proposal provides evidence that applicant is prepared to proceed with acquisition and/or rehabilitation.

1. Complete Worksheet #4: Targeted Areas.
2. Complete Worksheet #5: Project Preparation. *Clearly label requested attachments as directed and place behind the Worksheet # 5.*
 - a. Provide a narrative on no more than two (2) typewritten pages. The narrative should list and respond to each request for information in the order presented below. Please clearly label your narrative as "D. Project Preparation Narrative" and place your narrative after Worksheet #5.
 - For what purposes would you be requesting this funding?
 - Outcome to be achieved (include description of all units, both HOME and non-HOME).
 - Project activities or services that address proposed outcomes
 - If a rental project, briefly describe the management plan for the project.
 - Present a clear and reasonable work plan, including an estimated project timeline, preferably lease-up within a twelve (12) month timeframe, that identifies estimated start date, milestones to be accomplished within the funding period, and how long the project will take to complete including estimated completion date.
 - Describe any unique or innovative elements of the proposed project.
 - Meet Energy Star standards?
 - Meet Section 504 accessibility standards?
 - Is made affordable to very low- (< 50% AMI) households?
 - Is made affordable to extremely low-income (< 30% AMI) households?

- Are designated for low- and very low-income elderly residents?
 - Are designated for persons with HIV/AIDS?
 - Of these, how many are chronically homeless (1)?
 - Are designated for the homeless? Of these, how many are chronically homeless?
 - Will provide permanent housing to formerly-homeless households? Of these, how many are chronically homeless?
 - Are subsidized with project-based assistance through a Federal, state or local rent assistance program.
 - Are made affordable to households who previously resided in subsidized housing (homebuyer activities only)?
- b. If the proposal is a collaborative submission with other nonprofit organizations, explain how the project will be jointly conducted, identified roles and responsibilities of each participating party, and a description of the proposed project and beneficiaries will benefit from the collaboration. Include a letter of agreement between the collaborating organizations.

E. Management Capacity & Experience in Real Estate (Maximum 25 Points)

Applicant describes the project activities and how these will be accomplished within a specified time period – preferably within twelve (12) months.

1. Provide a narrative on no more than two (2) typewritten pages. The narrative should list and respond to each request for information in the order presented below. *Please clearly label your narrative as “E. Management Capacity and Experience in Real Estate” and place your narrative after Worksheet #5 and Worksheet #5 Attachments.*
 - a. Provide evidence of a successful track record of adequate organizational experience in owning and managing real estate. If the nonprofit applicant does not have an established track record, describe how the organization has partnered with another nonprofit organization with applicable experience.
 - b. Provide a detail of how your organization’s experience relates to the proposed affordable housing project.
 - c. Describe a recent successful project and your experience working with foreclosures.

F. Capacity for Project Financing And Leveraging (Maximum 25 Points)

This section of the proposal should show evidence of the ability to leverage non-county cash for project costs. **An equity contribution from the non-profit is not required, but if contributed, the non-profit would receive a preference in funding. The project should have adequate maintenance reserves and show a positive cash flow. As an alternative, the CHDO can set aside funds in a separate reserve account for the long-term sustainability of the project.**

1 HUD definition of “chronically homeless”: “To be defined as a chronically homeless, a person must be living on the street or in emergency shelter the time of the count or eligibility determination. The definition does not include those currently in transitional housing. “ Source: 2005 Continuum of Care Web Cast, <http://www.hud.gov/offices/cpd/homeless/apply/2005QandA2.pdf>..

This may include past grant history, firm commitments or demonstrated capacity to leverage funds. Financing and operating plans are feasible. Financing, other than county funds, has been committed or secured. Applicant demonstrates evidence of additional commitments of non-county financial and other material resources that are available to or attainable by the applicant and that will significantly support the project. Resources may include volunteers, in-kind contributions, cash donations, goods, supplies and services donations, grants and/or contracts. Evidence of adequate reserves for project would be identified in this section (i.e. bank accounts).

1. Complete worksheet # 6.
2. List and respond to each request for information in the order presented below. Provide no more than one (1) typewritten page of narrative. *Narrative responses should be explained and consistent with information provided on Worksheet #6.*

Briefly indicate whether any other county contributions, including a request for rehabilitation funds, or awards will support or are anticipated to support this project. Explain their commitment status. County awards may include loans, cash grants or contracts. Other county contributions may include space, utilities, equipment, staff, or service.

3. Provide a current organization-wide budget. Please clearly label this attachment as F. Budget-Organization Budget". Place behind Workshee#6 and Narrative.
4. Provide three (3) most recent annual audited financial statements and auditor's opinion and management letter, if issued. Audits must be conducted by an independent licensed certified public accountant. If an audit(s) is not available, please explain why.

WORKSHEET 1 – FY 2011-12 APPLICATION COVER SHEET

PLEASE READ AND SIGN BELOW.

Total Funding Requested \$ _____

Nonprofit Organization Name:

Address:

Contact Person:

Telephone:

Fax:

Federal Tax ID:

Identify if the application(s) is being submitted jointly with other nonprofit community-based organizations:

Yes (List other organization(s) by name):

No

[SIGN BELOW, UNSIGNED COVERSHEETS/APPLICATIONS WILL NOT BE ACCEPTED]

I CERTIFY THAT TO THE BEST OF MY KNOWLEDGE, information contained in this proposal is accurate. By signing this application, the undersigned offers and agrees, if the proposal is accepted, to furnish the items or services, subject to final negotiation and acceptance by Fairfax County, and subsequent contract award.

Executive Director (or name of representative) – Signature/Date

Print Name

Title/Date

**DEADLINE FOR SUBMISSION FOR CONSIDERATION IN THE FIRST ROUND FUNDING IS
4:00 P.M., TUESDAY, MARCH 29, 2011
PROPOSALS RECEIVED AFTER DEADLINE WILL NOT BE ACCEPTED
SUBMIT ORIGINAL AND FOUR (4) COPIES TO:
Fairfax County Department of Housing and Community Development
First Floor Reception Desk
3700 Pender Drive, Fairfax, VA 22030**

WORKSHEET 2 – APPLICATION SUMMARY SHEET

Project Title:

Funding Requested: Acquisition: \$ _____ Rehabilitation: \$ _____

Total Funding Requested \$ _____

Are you currently a Fairfax County approved Community Housing Development Organization (CHDO)?

Yes No

Do you intend to apply for CHDO designation under this RFP?

Yes No

Project Type (please mark all that apply):

Estimated Total Number of Units to be Acquired : _____

Foreclosed _____
Non-foreclosed _____

Estimated Total Number of Units to be Rehabilitated : _____

Foreclosed _____
Non-foreclosed _____

Estimated Total Number of Units Currently Owned by Your Organization to be Rehabilitated : _____

Unit Type (please check all that apply):

Condominium Single family detached Townhouse Other: Specify _____

Anticipated Service Area Neighborhood or Street Boundaries:

Magisterial/Supervisor District(s):

Tax Map(s) #:

Brief Project Description:

WORKSHEET 3 – CONSOLIDATED PLAN AND HOUSING BLUEPRINT PRIORITIES AND TARGETED POPULATIONS

Indicate the objectives as to which the applicant’s project is designed to meet. All households must be low income households (at or below 80% AMI), but indicate very low (at or below 50% AMI) or extremely low income households (at or below 30% AMI) for objective #3.

Specific Housing Objectives

The table below shows the specific objectives to meet the four goals outlined in Appendix 2.

Objective Number	Objective Description	Yes/No
1	Provide housing units affordable to homeless individuals and families	
2	Provide housing units affordable to persons with physical or mental disabilities, including persons with HIV/AIDS	
3	Provide housing units affordable to households with low to extremely-low incomes (<50 percent MFI) and other special needs populations	If yes, 30% AMI = ____% of Project Units 50% AMI = ____% of Project Units
4	Provide sufficient workforce housing through land use policy	
5	Provide sufficient workforce housing through private sector partnerships	
6	Preserve existing Public Housing	
7	Promote resident self-sufficiency	
8	Foster coordination and partnerships	

WORKSHEET 4 – TARGETED AREAS

Please attach a map or project narrative with the following information about the proposed project area of focus (**Please label the map or narrative as Attachment 4a, and place behind Worksheet #4**).

1. :
 - a. Concentration of low-income residents
 - b. Concentration of affordable housing
 - c. Minority concentration

2. Project will preserve and/or rehabilitates affordable units (Check One):
 Yes No

3. Estimated Total # of new affordable housing units in area project will produce:

WORKSHEET 5 – PROJECT PREPARATION

Number of years organization in operation: _____ Date Incorporated: _____

Number of years organization in housing development: _____

Total number of units produced: _____
Rehabilitated _____
Owned _____
Managed _____
Constructed _____

Estimate percentage of above total housing units produced that served very low and low-income persons:

30% of median and below _____
50% of median and below _____
80% of median and below _____

Number of employees/volunteers in organization: _____
full-time employees _____
part-time employees _____
volunteers _____

Number of employees/volunteers to work on project: _____
full time _____
part time _____
volunteers _____

Type of Proposed Project (Check One):

Rental Development Home Ownership

Project preserves and/or rehabilitates existing affordable units (Check One):

Yes No

Please check **Yes** or **No**, as appropriate, for the proposed project and provide attachments as indicated in the sequence below. *Clearly label requested attachments as directed below and place these attachments behind this worksheet.*

1. Do you have a site(s) identified? If yes, provide location site map(s) for the project(s). Label as Attachment 5a. Yes No
2. If the site is identified, do you anticipate the property requiring a rezoning/special use permit for your proposed project? Yes No

3. Has total project financing been identified for this project? Yes No
4. Is project ready for implementation, assuming HOME funding under this RFP? Yes No

If possible, identify age of housing units to be preserved and/or rehabilitated: _____

Identify the condition of the housing units to be preserved and/or rehabilitated (Check One):

- No rehabilitation needed, units have been inspected and meet county codes and standards;
Minor rehabilitation required (total rehabilitation costs below \$25,000 per unit); or
Substantial rehabilitation required (total rehabilitation costs \$25,000 or more per unit).

Do you have schematics and a preliminary site plan for the project? Yes No

Do you have detailed cost estimates for rehab work? If yes, submit one copy and identify source of estimates. Clearly label.

Yes No

Do you have an engineering report detailing property condition? Yes No

Has an appraisal been completed for the property? Yes No

If yes, what is the appraised value of the property? \$ _____

What is the assessed value of the property? \$ _____

WORKSHEET 6 – ESTIMATED PROJECT COSTS AND FINANCING (If Project is Identified)

1. Estimated Project Costs:

	<u>Per Unit</u>	<u>Total</u>
Acquisition:	\$	\$
Rehabilitation:	\$	\$
Other (financing, insurance, legal fees):	\$	\$
Total Estimated Project Cost:	\$	\$

2. Project Financing: *(If additional space is needed, insert additional page(s) following this one, and clearly label as Worksheet #6, Continued.)*

Proposed

HOME

Funds:

\$

Equity

Source:	Amount:\$	Committed: <input type="checkbox"/> Yes <input type="checkbox"/> No
Source:	Amount:\$	Committed: <input type="checkbox"/> Yes <input type="checkbox"/> No
Source:	Amount:\$	Committed: <input type="checkbox"/> Yes <input type="checkbox"/> No
Total Equity:	\$	

Loans

1 st Trust:	\$	at %IRR* for months	Source: Committed: <input type="checkbox"/> Yes <input type="checkbox"/> No
2 nd Trust:	\$	at %IRR* for months	Source: Committed: <input type="checkbox"/> Yes <input type="checkbox"/> No
3 rd Trust:	\$	at %IRR* for months	Source: Committed: <input type="checkbox"/> Yes <input type="checkbox"/> No
Total Loans:	\$		

TOTAL PROJECT FINANCING:

\$

TOTAL HOME as % of Total Project Financing:

%

* IRR-Internal rate of return also known as the effective interest rate.

Complete For Rental Projects Only:

Occupancy Income Limits:

Total # Units in Proposed Project:

Affordable Units

- # units at or below 30% AMI:
- # units at or below 60% AMI:
- # units at or below 50% AMI:
- # units at or below 80% AMI:

Market Rate Units

- # units at market rate:

PROPOSED RENT SCHEDULE:

UNIT TYPE	TOTAL NO. OF UNITS BY TYPE	RENT	UTILITIES	INCOME SERVED AS PERCENT OF AMI

Does the project involve any temporary relocation? (Check One):

- Yes No

Projects requiring permanent relocation will not be considered for funding.

WORKSHEET 7 – APPLICATION CHECKLIST

A. APPLICATION COVER SHEET

- Worksheet #1

B. APPLICATION SUMMARY SHEET

- Worksheet #2

C. CONSOLIDATED PLAN PRIORITIES AND TARGETED POPULATIONS

- Worksheet #3
- 1 page Narrative

D. PROJECT PREPARATION

- Worksheet #4
- Worksheet #5
- 2 page Narrative

E. MANAGEMENT CAPACITY AND EXPERIENCE IN REAL ESTATE

- 2 page Narrative

F. CAPACITY FOR PROJECT FINANCING AND LEVERAGING Estimated Project Costs and Financing

- Worksheet #6
- 1 page Narrative
- Organization Budget
- Three most recent annual audited financial statements
- CHDO Certification Documents (see Appendix 5)

APPLICATION CHECKLIST

- Worksheet #7