

# FY 2023 CDBG AND HOME REQUEST FOR PROPOSALS FOR PERMANENT HOUSING 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 Demonstration of Need	0 – 25 Points
Criterion 2 Project Preparation, Innovation, and Collaboration	0 – 25 Points
Criterion 3 Management Capacity and Real Estate Experience	0 – 20 Points
Criterion 4 Capacity for Project Financing and Leveraging	0 – 30 Points
<b>TOTAL</b>	<b>0 – 100 Points</b>

# FY 2023 CDBG AND HOME EVALUATION CRITERIA

## 1. DEMONSTRATION OF NEED

**Maximum Points Possible: 25 Points**

Proposal indicates which Consolidated Plan and Housing Blueprint goals the applicant's project is designed to meet. In addition, the proposal shows evidence of consideration and alignment with the Communitywide Housing Strategic Plan, One Fairfax, and the Chairman's Equity Task Force objectives. All households must be low- or moderate-income households (at or below 80% AMI), but proposal specifically focuses on Consolidated Plan Goals and Objectives 1-4:

1. To address the challenge of homelessness.
2. To provide affordable housing options to special needs populations.
3. To meet the affordable housing needs of low-income working households.
4. To increase workforce housing through creative partnerships and public policy.

For the purposes of this RFP, special needs are defined as each of the following populations earning at or below 60% of AMI:

- o Elderly persons ages 62 and older;
- o Youth transitioning out of foster care;
- o Homeless (or at-risk of homelessness);
- o Persons with disabilities (physical, mental, or sensory);
- o Veterans;
- o (families with five or more members);

and

- o Survivors of domestic violence earning at or below 80% of AMI.

Category	Guidance	Points Available
Target Population	Proposal clearly describes the targeted population to be served and explains how their needs will be served through this project.	0 to 5
Target Household AMI	All households served must be at or below moderate income (80% or below AMI). Higher Points: 60% or below AMI Highest Points: 30% or below AMI	0 to 5
SNP:	<p><u>Project will serve the following populations earning at or below 60% of AMI</u></p> <ul style="list-style-type: none"> <li>o <u>Elderly</u>: Elderly persons ages 62.</li> <li>o <u>Youth</u>: Youth transitioning out of foster care.</li> <li>o <u>Homeless</u>: Homeless or at-risk homeless residents</li> <li>o <u>Disabilities</u>: Persons with disabilities (physical, mental, or sensory).</li> <li>o <u>Veterans</u>.</li> <li>o <u>Large Families</u>: Families with five or more members.</li> </ul> <p><u>Or</u></p> <ul style="list-style-type: none"> <li>o <u>Domestic Violence</u>: Survivors of domestic violence earning 80% or below AMI.</li> </ul>	0 to 5
Areas Lacking Affordable Housing; Areas Considered Mixed-Income	Project will add affordable housing in geographic areas that lack affordable housing and, to the extent possible, project will be located in a mixed-income community.	0 to 5

Permanent Supportive Housing	Project provides for supportive services, case management, or other wraparound services to enable individuals to live as independently as possible in a community setting.	0 to 3
Proximity to Public Transportation and Active Retail or Recreation	Project provides residents with close proximity to public transportation as well as active retail that residents can frequent or active recreation (ball fields and other facilities) and project provides or maintains green space.	0 to 2
	<b>Total</b>	<b>0 to 25</b>

## 2. PROJECT PREPARATION, INNOVATION, AND COLLABORATION

**Maximum Points Possible: 25 Points**

Proposal provides evidence that the applicant is knowledgeable about housing in the proposed project area and has identified (or will identify) possible sites. Applicant will complete the acquisition, development, and rehabilitation of the project, as applicable, and the project will be fully occupied no later than 24 months from the date of the FCRHA grant award.

Category	Guidance	Points Available
Housing Knowledge in Targeted Area	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.	0 to 5
Plan and Project Completion Timeline for Acquisition, Development, Rehabilitation, and Occupancy	<p>Proposal presents a clear and reasonable acquisition/development/rehabilitation and occupancy management plan for how to accomplish project goals. Projects proposing new construction must have a plan for completion. Projects proposing rehabilitation-only must demonstrate the proposed activities are CDBG or HOME-eligible.</p> <p>Proposal provides evidence that project will be completed and fully occupied within 24 months from the date of the FCRHA funding award and describes a realistic plan for occupancy to include prospective sources of eligible tenants. If in partnership with another organization or other resources to help recruit tenants, include written letter of support or agreement.</p> <p>Higher Points: Complete the acquisition and rehabilitation by June 30, 2023 and be fully occupied within 9 months from the date of the FCRHA funding award.</p> <p>Highest Points: Complete the acquisition and rehabilitation by April 21, 2023 and be fully occupied within 6 months from the date of the FCRHA funding award.</p>	0 to 10
Site Identification	<p>Applicant has identified a potential project site (address, tax parcel ID).</p> <p>Highest points: Signed contract for projects that involve acquisition. For rehabilitation projects three written estimates of rehab work needed to be done.</p>	0 to 5
Project Innovation and Collaboration	Project is innovative in nature (green/energy efficiency standards, new housing structure technologies), integrates housing project management technology (HMIS, YARDI©), or project utilizes multiple resources and collaborates with other organizations in order to maximize benefit to the end consumer.	0 to 5
<b>Total</b>		<b>0 to 25</b>

### 3. MANAGEMENT CAPACITY AND REAL ESTATE EXPERIENCE

**Maximum Points Possible: 20 Points**

Proposal demonstrates organizational capacity to successfully complete project activities and its objective(s), from acquisition, development, and rehabilitation through occupancy. Applicant will complete the development, acquisition, and rehabilitation of the project, as applicable, and be fully occupied no later than 24 months from the date of the FCRHA grant award. Applicant also demonstrates ability to meet ongoing 30-year affordability program requirements.

<b>Category</b>	<b>Guidance</b>	<b>Points Available</b>
Organizational Experience in Owning and Managing Real Estate	Proposal demonstrates successful track record as evidence of adequate organizational experience in owning and managing real estate. If the non-profit applicant does not have an established track record, the organization is partnered with another non-profit organization with applicable experience.	0 to 5
Staff Experience with Acquisition, Development and Rehabilitation Work	Description of staff involved and their expertise as it pertains to project activities.	0 to 5
Staff Experience with Proposed Project's Ongoing CDBG and HOME Compliance and Program Requirements, Including On-going Monitoring	Description of staff involved and their expertise as it pertains to project activities relative to CDBG and HOME program compliance and program management. Applicant describes a plan for operating, monitoring, and preserving the property during the 30-year affordability period, specifically monitoring affordability, rent, income, and property standards in compliance with CDBG and HOME, as well as FCRHA requirements, as applicable. Evidence that there has been no past default with FCRHA loans with existing borrower applicants.	0 to 5
Previous Project Completion Experience (acquisition, development, rehabilitation, and recruiting beneficiaries)	Proposal describes how the organization has previously met similar-type project completion deadlines in the last 5 years, including previous DHCD or CCFP affordable housing project awards, if applicable.	0 to 5
	<b>Total</b>	<b>0 to 20</b>

#### 4. CAPACITY FOR PROJECT FINANCING AND LEVERAGING

**Maximum Points Possible: 30 Points**

Proposal provides evidence that the organization is fiscally sound, estimated project costs are realistic, project financing and monthly operating plans are feasible, and financing sources are committed or secured for the acquisition and/or rehabilitation of the project. Proposal identifies additional resources other than County funds or County contributions that can help support the capital aspects of the proposed project. Resources may include volunteers, in-kind contributions, cash donations, goods, supplies and services donations, grants and/or contracts. The project must be able to build and maintain adequate operating, maintenance, and capital replacement reserves.

<b>Category</b>	<b>Guidance</b>	<b>Points Available</b>
Fiscal Condition and Financing Stability	Applicant provides evidence of a sound fiscal condition, financial stability of their organization, and their ability to carry out this project.	0 to 5
Project Costs and Financing	Estimated project costs and financing are clearly described, documented, and reasonable for type of project.	0 to 5
Project Cash Flow and Pro Forma	Operating budget plans are feasible and show a positive annual cash flow that demonstrates ability to achieve 30-year affordability.	0 to 5
Leveraging	<p>Financing other than County funds has been committed or secured. 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-CDBG and non-HOME project financing sources have been identified in writing.</p> <p>Higher Points: Applicant demonstrates additional written commitments of at least 5% of non-County resources to be used towards the total estimated capital project costs from all sources.</p> <p>Highest points: Applicant demonstrates additional written commitments of at least 20% of non-County resources to be used towards the total estimated capital project costs from all sources.</p>	0 to 10
Operating, Maintenance and Capital Replacement Reserves (post-closing)	The proposal describes how the organization will build and maintain adequate operating (if a vacancy occurs), maintenance, and capital replacement reserves during the 30-year affordability period.	0 to 5
	<b>Total</b>	<b>0 to 30</b>

**4. CAPACITY FOR PROJECT FINANCING AND LEVERAGING - MULTIFAMILY**

**Maximum Points Possible: 30 Points**

Proposal provides evidence that the organization is fiscally sound, estimated project costs are realistic, project financing and monthly operating plans are feasible, and financing sources are committed or secured for the acquisition and/or rehabilitation of the project. Proposal identifies additional resources other than County funds or County contributions that can help support the capital aspects of the proposed project. Resources may include volunteers, in-kind contributions, cash donations, goods, supplies and services donations, grants and/or contracts. The project must be able to build and maintain adequate operating, replacement, and maintenance reserves.

<b>Category</b>	<b>Guidance</b>	<b>Points Available</b>
Fiscal Condition and Financing Stability	Applicant provides evidence of a sound fiscal condition and financial stability of their organization.	0 to 5
Development Characteristics	Universal design, Earthcraft or LEED Certified in up to 10% of the units.	0 to 5
Project Cash Flow and Pro Forma	Operating budget plans are feasible and show a positive cash flow of operating revenue for 15 years and will achieve this throughout the 30-year affordability period.	0 to 5
Project Costs and Financing Leveraging	<p>Estimated project costs and financing are clearly described. Financing other than County funds has been committed or secured. 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-CDBG and non-HOME project financing sources have been identified in writing.</p> <p>Documentation identifies proposed project financing. More points given if there are existing subsidies in the project.</p> <p>Higher Points: Applicant demonstrates additional written commitments of at least 5% of non-County resources to be used towards the total estimated capital project costs from all sources.</p> <p>Highest points: Applicant demonstrates additional commitments of 4:1 leveraging or at least 20% of non-County resources to be used towards the total estimated capital project costs from all sources.</p> <p>Applicant provides subsidy layering analysis to be reviewed.</p>	0 to 10
Operating, Maintenance and Capital Replacement Reserves	The proposal describes how the organization will build and maintain adequate operating (if a vacancy occurs), maintenance, and capital replacement reserves during the 30-year affordability period.	0 to 5
<b>Total</b>		<b>0 to 30</b>

# APPLICATION INSTRUCTIONS

## Application Submission

Applications will be available at [www.fairfaxcounty.gov/housing](http://www.fairfaxcounty.gov/housing) and must be submitted by 4:00 p.m. E.S.T. on Friday, September 23, 2022 for consideration of funding. Applicants must either:

1) Do all of (A) through (C): (A) Send an email to [Stephen.Knippler@fairfaxcounty.gov](mailto:Stephen.Knippler@fairfaxcounty.gov) stating that you are ready to submit and requesting a ShareFile address for uploading the application. (B) Send one .pdf of the entire application, including all worksheets and attachments, to the ShareFile address provided by HCD. (C) Send or hand deliver to HCD's first floor reception desk one hard copy with one original signature at 3700 Pender Drive, Fairfax, Virginia 22030.

OR

2) Send or hand deliver five hard copies (including one with an original signature) to HCD's first floor reception desk at 3700 Pender Drive, Fairfax, Virginia 22030.

- **Late applications will not be considered.** Allow extra time for possible technical issues and 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 only will not be accepted.
  2. **If you are submitting under Option 2 above – i.e., paper only – applicants are required to submit one original and four (4) 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.
  4. Application responses should be typewritten according to the following specifications:
    - i. Where narrative response is requested, the written response should be in a legible font size of 12 point or larger and limited to the number of pages indicated.
    - ii. Where completion of worksheets is indicated, the responses should be made on the worksheets provided.
    - iii. Narrative responses and requested attachments should be placed in the sequence indicated in the Application Components section.
  5. Attachments (other than narratives and worksheets):
    - i. All attachments should be on 8½ by 11-inch or 8½ by 14-inch white paper for submission.
    - ii. 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, no spiral binding.

## Questions

For additional information, contact Stephen Knippler, Senior Program Manager, at 703-246-5161 or Malia Stroble, Real Estate Finance and Grants Management Division Administrative Assistant, at 703-246-5170 (TTY: 711).



# 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. Each of the following Application Components is to be submitted in the following sequence.

## A. Application Cover Sheet

Each application must include a FY 2023 Application Cover Sheet – Worksheet A. Applicant's executive director or designee authorized to legally bind the applicant organization must sign each Application Cover Sheet. The total proposed funding request amount should be listed on the Application Cover Sheet. Applicants that submit jointly with other non-profit organizations should 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.

NOTE: Unsigned Application Cover Sheets will result in the rejection of the application.

## B. Application Summary Sheet

Each application must include an Application Summary Sheet – Worksheet B. The information on the Application Summary Sheet provides a concise project description. Use the space provided and do not attach additional pages.

## C. Demonstration of Need (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 C: Demonstration of Need. Identify the priority household populations the applicant's project is designed to serve.
2. Provide a narrative on no more than three (3) typewritten pages that lists and responds to each request for information in the order presented below. Document your source(s) of information. Clearly label your narrative and place directly after Worksheet C.
  - 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 as below:

The following populations earning at or below 60% of Area Median Income (AMI):

- Elderly persons ages 62 and up;
- Youth transitioning out of foster care;
- Homeless (or at risk of homelessness);
- Persons with disabilities (physical, mental, or sensory);
- Veterans;
- Large households (households with five or more members)

Or

Survivors of domestic violence earning at or below 80% of AMI.

- c. Explain how the project will add affordable housing in geographic areas that lack affordable housing. Information on committed affordable rental homes in Fairfax County can be found on the Affordable Housing Dashboard, <https://www.fcrha.org/affordable-housing-dashboard>. If applicable, provide information used to determine that the project will be located in a mixed-income community.
- d. Is the project subsidized with project-based assistance through a federal, state or local rent assistance program? Explain in detail how the rent will be subsidized.
- e. Provide, as an attachment, a copy of applicant's tenant selection policy.
- f. Describe how this project will provide residents with close proximity to public transportation and neighborhood amenities such as desirable retail or recreation.
- g. Describe the need to be addressed and whether supportive services or adequate case management for the targeted population will also be provided or leveraged. If services are leveraged, provide a written letter of support or agreement, and clearly label as an attachment.

#### **D. Project Preparation, Innovation, and Collaboration (Maximum 25 Points)**

This section addresses status of the proposed project and whether the proposed project acquires, develops, 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, development, or rehabilitation.

1. Complete Worksheet D1: Targeted Areas.
2. Complete Worksheet D2: Project Preparation, Innovation and Collaboration. Provide a narrative on no more than six (6) typewritten pages that provides details on the items below. Clearly label narrative and any requested attachments, and place behind Worksheet D2.
  - a. Provide a narrative that lists and responds to each request for information in the order presented below.
    - For what purposes are you requesting this funding?
    - Outcome to be achieved (include description of all units, both CDBG and HOME) and why this is a need in Fairfax County or one of the Participating Jurisdictions, as applicable (Town of Clifton, Vienna, Herndon, City of Fairfax, City of Falls Church)
    - Reasonable and clear plan for acquisition/development/rehabilitation.
    - Affirmative fair housing marketing plan.
    - Project activities or services that address proposed outcomes.
    - Meet Energy Star standards?

- Meet Section 504 accessibility standards?
  - Compliance with Section 3 regulations, if triggered?
- b. Present a detailed, realistic work plan that describes how project goals will be accomplished and includes: an estimated project timeline, start date, milestones to be accomplished during the funding period, anticipated property closing date, when funds will be completely expended, and estimated project completion date that reflects when unit(s) will be occupied.
- c. Provide information on how your organization plans to find tenants to occupy units in a timely manner. Include written letters of support or agreement, if applicable.
- d. Provide your organization's occupancy policy for the project. Indicate if it is consistent with the following, and if not, explain reasons for any deviations.

<b>GENERAL OCCUPANCY GUIDELINES</b>		
Number of Bedrooms	Minimum Number of Persons	Maximum Number of Persons
1	1	2
2	2	4
3	3	6
4	4	8

- e. Due to the square footage of some bedrooms, the household composition allowed in the unit may be restricted to fewer occupants than two people per bedroom in order to comply with Fairfax County Zoning and Building Code regulations.

These occupancy standards establish the size of the unit a family will occupy, not the actual sleeping arrangements of the family. Exceptions are made for live-in aides or accommodations.

Explain how your organization will handle situations where there is no longer the minimum number of persons for the number of bedrooms.

- f. Provide details if the proposal is innovative in nature utilizing new housing solutions, new green/energy efficiency standards, or new building technologies. See HUD's Innovative Housing Showcase [https://www.hud.gov/Innovative\\_Housing](https://www.hud.gov/Innovative_Housing). If the project will be managed utilizing housing software such as the Homeless Management Information System (HMIS) or the YARDI© Property Management System, or others of the like, please specify here.
- g. If the proposal is a collaboration with other organizations, explain how the project will be jointly conducted, identify roles and responsibilities of each participating party, and describe the proposed project and beneficiaries who will benefit from the collaboration. Include a letter of agreement between the collaborating organizations.

**E. Management Capacity & Experience in Real Estate (Maximum 20 Points)**

Applicant describes the project activities, from acquisition, development, and rehabilitation, as applicable, through occupancy, and how these will be accomplished within a specified time period, preferably by April 21, 2023 or within 24 months from the date of the FCRHA funding award.

1. Provide a narrative labelled Worksheet E of no more than five (5) typewritten pages. The narrative should list and respond to each request for information in the order presented below.
  - a. Provide evidence of a successful track record of adequate organizational experience in owning and managing real estate. If the non-profit applicant does not have an established track record, describe how the organization has partnered with another non-profit organization with applicable experience.
  - b. Provide details of how your organization's experience relates to the proposed affordable housing project, including successful leasing of units.
  - c. Provide a description of staff that will be involved in this project and their expertise as it pertains to the proposed activities. Describe who will be the designated HOME and CDBG compliance staff and describe their expertise with these federal programs.
  - d. Provide information on the last five years of HCD- or Consolidated Community Funding Pool (CCFP)-funded projects similar to the proposed projects and the timeline of activities from start to project completion and whether or not your organization met proposal timeline goals. If your organization did not have an HCD- or CCFP-funded project in the last five years, describe other experience with similar type projects in the last five years.
  - e. Provide a plan for how the Applicant will operate, monitor, and preserve the property during the 30-year affordability period in order for the project to remain in compliance with CDBG and HOME, as well as FCRHA requirements, as applicable.

**F. Capacity for Project Financing and Leveraging (Maximum 30 Points)**

Applicant provides evidence of its fiscal condition and financial stability. Applicant clearly describes estimated project costs and financing plan, and includes documentation to support project feasibility. The applicant must demonstrate positive cash flow from operations, including documentation showing positive monthly and annual operating net income levels.

Present evidence of financing other than County funds that has been committed or secured for the acquisition and/or rehabilitation of the project, or demonstrate evidence of additional non-County commitments that are available to or attainable by the applicant that will significantly support the capital project. Resources may include volunteers; in-kind contributions; cash donations; goods, supplies and services donations; as well as grants or contracts.

The project should be able to build and maintain adequate annual operating and maintenance reserves and reserve contributions to ensure the long-term sustainability of the project.

1. Complete Worksheet F.
2. Respond to each request for information in the order presented below. Provide no more than two (2) typewritten pages of narrative, and any additional supporting documents. Clearly label as Attachments and place directly after Worksheet F.
  - a) Indicate whether any other County contributions, including a request for rehabilitation funds, project-based vouchers, or other awards, are anticipated to support this project. Explain their commitment status and include a commitment letter, if available. County awards may include loans, cash grants or contracts. Other County contributions may include space, utilities, equipment, staff or services.
  - b) Describe any non-County resources, including cash, that have been leveraged and are committed or secured. Only non-County resources will be considered leverage.
  - c) Provide a statement describing the fiscal condition and stability of your organization, and how the additional units proposed in this project will impact your organization's cash flow situation.
  - d) Indicate whether the project collaborated with other nonprofits or organizations to further leverage resources through costs or services that will benefit the end resident.
3. Provide current organization-wide budget/actuals, including unaudited income and expense statements for the most current fiscal year. In addition, provide a current year-to-date income and expense report (unaudited) as of July 2022. Clearly label as an Attachment.
4. Provide a current organization portfolio debt service performance report. Include all liabilities both short term and long term. Clearly label as an Attachment.
5. Provide the last three years annual audited 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 (Single Audit) is required by federal regulations if total federal dollars expended in any fiscal year of the organization exceeds \$750,000 from all sources. If a Single Audit is required, include it in the submission. If an audit(s) is not available, please explain why. Clearly label as an Attachment.
6. If the project involves an acquisition, provide a pro-forma analysis of the project's financial performance for at least the first 5 years of the affordability period, including rental income (within affordability guidelines), expenses, and deposits to reserves. Use Worksheet G or submit your own pro-forma with similar-type information and label as Worksheet G.
7. Describe how the organization will build and maintain adequate operating, maintenance, and capital replacement reserves during the 30-year affordability period. Clearly label as an Attachment.
8. For multifamily project consisting of 6 to 30 units, see the scoring criteria for multi-family projects.

If an applicant is awarded funding, the organization will be required to cooperate with Fairfax County and the FCRHA to periodically review the organization's annual financial operations, as requested. In addition, the organization will be required to maintain a separate FCRHA reserve account associated with the housing units acquired and/or rehabilitated through this funding award.

## **APPLICATION CHECKLIST**

### **A. FY 2023 APPLICATION COVER SHEET**

- Worksheet A

### **B. APPLICATION SUMMARY SHEET**

- Worksheet B

### **C. DEMONSTRATION OF NEED**

- Worksheet C
- Attachment (population served, supportive services)

### **D. PROJECT PREPARATION, INNOVATION, AND COLLABORATION**

- Worksheet D1
- Attachment (proposed project area)
- Worksheet D2
- Attachment, if applicable (site map)
- Attachment, if applicable (signed contract)
- Attachment, if applicable (cost estimate for rehabilitation work)
- Attachment (project details)
- Attachment, if applicable (collaboration)

### **E. MANAGEMENT CAPACITY & EXPERIENCE IN REAL ESTATE**

- Worksheet E

### **F. CAPACITY FOR PROJECT FINANCING AND LEVERAGING**

- Worksheet F
- Attachment (County and non-County resources, fiscal condition, cash flow)
- Attachment (organization budget)
- Attachment (portfolio debt service performance report)
- Attachment (three (3) most recent annual audited financial statements)
- Worksheet G, if applicable
- Attachment (loan pay-back information, reserves)

# WORKSHEET A – FY 2023 APPLICATION COVER SHEET

PLEASE READ AND SIGN BELOW.

Total Funding Requested \$ \_\_\_\_\_

Non-profit Organization Name:

Address:

Contact Person:

Telephone:

Fax:

Federal Tax ID:

Unique Entity Identifier (UEI):

Identify if the application(s) is being submitted jointly with other 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.

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Executive Director (or name of representative) – Signature

---

Print Name

Title/Date

1

Fairfax County Department of Housing and Community Development  
Gray Drop Box  
3700 Pender Drive, Fairfax, VA 22030





## WORKSHEET C – DEMONSTRATION OF NEED

Indicate the objectives that the applicant's project is designed to meet. All households must be at or below 80% AMI, but indicate at or below 60% AMI, at or below 30% AMI, or special needs population for objective #3.

### Specific Housing Objectives

The table below shows the specific objectives to meet the four goals outlined in Appendix 1. Evaluate the project. Include information from this worksheet in the typewritten narrative.

Objective Number	Objective Description	Yes/No
1	Provide affordable housing units/rental subsidies 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 <60 percent AMI to <30 percent AMI, including <80 percent AMI, working families and other special needs populations	If yes, 30% AMI = ____% of Project Units 60% AMI= ____% of Project Units 80% AMI = ____% of Project Units Special Needs population:_____
4	Provide sufficient workforce housing through land use policy	
5	Provide sufficient workforce housing through private sector partnerships	
6	Preserve existing Rental Assistance Demonstration-Project Based Voucher housing units by ensuring greater sustainability	
7	Promote resident self-sufficiency	
8	Foster coordination and partnerships	
9	Provide long term affordability and preservation of subsidy greater than >30 yrs.	

## WORKSHEET D1 – TARGETED AREAS

Attach a map or project narrative with the following information about the proposed project area consisting of a 10 mile radius. Clearly label the map or narrative and place directly after Worksheet D1.

1. Demographics and affordable housing
  - a. Concentration of low-income residents
  - b. Concentration of affordable housing
  - c. Minority concentration
  
2. Estimated total # of new affordable rental housing units project will produce or preserve:  
\_\_\_\_\_
  
3. Estimated total # of new affordable homeownership housing units project will produce or preserve: \_\_\_\_\_

## WORKSHEET D2 – PROJECT PREPARATION, INNOVATION AND COLLABORATION

Number of years organization has been in operation: \_\_\_\_\_ Date Incorporated: \_\_\_\_\_

Number of years organization has been 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 \_\_\_\_\_  
60% 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 this project: \_\_\_\_\_  
full time \_\_\_\_\_  
part time \_\_\_\_\_  
volunteers \_\_\_\_\_

**Type of Proposed Project** (Check One):

Project acquires, develops, 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 and place directly after Worksheet D2.

1. Do you have a site(s) identified? If yes, provide location site map(s) for the project(s). Include as an Attachment.    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. Do you have a signed contract? If yes, provide a copy. Include as an Attachment.  
Yes    No

4. Has total project financing been identified for this project?      Yes      No

5. Is project ready for implementation?                      Yes      No

Identify the condition of the housing units to be acquired, developed, or rehabilitated (Check One):

- New units are being developed through this project;
- No rehabilitation needed, units have been inspected and meet county codes and standards;
- Minor rehabilitation required (total rehabilitation costs below \$20,000 per unit);
- Substantial rehabilitation required (total rehabilitation costs \$20,000 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 rehabilitation work? If yes, submit one copy and identify source of estimates. Include as attachment.                      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 E – MANAGEMENT CAPACITY & EXPERIENCE IN REAL ESTATE**

[narrative]

# WORKSHEET F – ESTIMATED PROJECT COSTS AND FINANCING

## 1. Estimated Project Costs:

	Per Unit	Total
Acquisition	\$	\$
Development	\$	\$
Rehabilitation	\$	\$
Other (e.g., financing, insurance, legal)	\$	\$
<b>Total Estimated Project Cost</b>	<b>\$</b>	<b>\$</b>

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

### Proposed CDBG and 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
<b>Total Equity:</b>	<b>\$</b>	

### Loans

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

### **TOTAL PROJECT FINANCING:**

\$

### **CDBG and HOME as % of Total Project Financing:**

%

**Rental Worksheet:**

**Occupancy Income Limits:**

**Total # Units in Proposed Project:**

**Affordable Units**

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

**Market Rate Units**

- # units at market rate:

**PROPOSED RENT SCHEDULE:**

<b>UNIT TYPE</b>	<b>TOTAL NO. OF UNITS BY TYPE</b>	<b>RENT</b>	<b>UTILITIES</b>	<b>INCOME SERVED AS PERCENT OF AMI</b>

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

Yes      No

If yes, describe the project's relocation plan (e.g., description of impacted households, budget, schedule):



**WORKSHEET G – RENTAL PROJECT PRO-FORMA (can be put into EXCEL)**

	1 <sup>st</sup> Year	2 <sup>nd</sup> Year	3 <sup>rd</sup> Year	4 <sup>th</sup> Year	5 <sup>th</sup> Year
<b><i>Budgeted Rent</i></b>					
<i>Less: Vacancy Loss (5%)</i>					
<b><i>Effective Gross Income</i></b>					
<b><i>Operating Expenses</i></b>					
<i>Real Estate Taxes</i>					
<i>Management Fees</i>					
<i>Maintenance &amp; Repairs</i>					
<i>HOA Fees</i>					
<i>Insurance</i>					
<i>Utilities</i>					
<i>Miscellaneous</i>					
<b><i>Total Operating Expenses</i></b>					
<b><i>Net Income</i></b>					
<i>Less: RHA Reserves*</i>					
<b><i>Net Operating Cash Flow</i></b>					
* Calculated as (Net Income - \$200) x 25%					