

**2010 CDBG/ESG/HOME RATING SHEET**

**PROJECT NAME**  **PROPOSAL #**

To rank project, score sections A, B, C plus relevant project category. Partial points can be awarded; explain in Comments.

|  | <b>MAXIMUM POINTS</b> | <b>EARNED POINTS</b> | <b>COMMENTS</b> |
|--|-----------------------|----------------------|-----------------|
| <b>A. PLANNING AND GENERAL CRITERIA</b>  |                       |                      |                 |
| 1. Significantly impacts goals in more than one project category   | 5                     |                      |                 |
| 2. Applicant is community-based organization/CHDO  | 5                     |                      |                 |
| 3. Incompatible with CDP policies and priorities   | -10                   |                      |                 |
| 4. Can be accomplished under existing, broader program   | -10                   |                      |                 |
| 5. Evidence of NPU/APAB opposition   | -10                   |                      |                 |
| 6. Evidence of other community opposition  | -5                    |                      |                 |
| 7. Provides for significant environmental benefits   | 10                    |                      |                 |
| 8. Other Considerations: _____   | -15/+15               |                      |                 |
| <b>B. FISCAL CRITERIA</b>  |                       |                      |                 |
| 1. Reduces on-going City costs; contributes to disposal of City-owned property   | 10                    |                      |                 |
| 2. Necessary to protect previous City investment   | 20                    |                      |                 |
| 3. Lacks evidence that other sources of funds were sought (outside agencies)   | -15                   |                      |                 |
| 4. Commits City to significant future funding obligation to attain eligibility   | -15                   |                      |                 |
| 5. Latest audit/monitoring includes significant unresolved findings/ Federal monitoring compliance outstanding   | -15 / -25             |                      |                 |
| 6. Is in default or untimely payment on outstanding loan   | -15                   |                      |                 |
| 7. Written financial procedures are insufficient to ensure management controls   | -5                    |                      |                 |
| 8. For physical improvement projects, administrative costs exceed 20%  | -15                   |                      |                 |
| <b>C. ORGANIZATIONAL CAPACITY/ PROJECT MANAGEMENT CRITERIA</b>   |                       |                      |                 |
| 1. <u>Organizational Capacity:</u>   |                       |                      |                 |
| a. General stability & track record of organization  | 12                    |                      |                 |
| b. Applicant has demonstrated success in effective service delivery/desired outcomes for:  |                       |                      |                 |
| i. proposed activity   | 20                    |                      |                 |
| ii. similar activity   | 10                    |                      |                 |
| c. Applicant lacks capacity to implement expeditiously   | -15                   |                      |                 |
| 2. <u>Project Management:</u>  |                       |                      |                 |
| a. Requires permanent relocation   | -25                   |                      |                 |
| b. Requires provision of replacement housing   | -20                   |                      |                 |
| c. Project completion schedule:  |                       |                      |                 |
| 1) Funds expended within 6 months of funds availability  | 10                    |                      |                 |
| 2) Funds expended within 1 ½ years of funds availability   | 5                     |                      |                 |
| 3) Funds expended within 1 ½ -2 years of funds availability  | -5                    |                      |                 |
| 4) Funds expended in over 2 years  | -20                   |                      |                 |
| d. Lacks evidence of need _____  | -10                   |                      |                 |
| e. Lacks documentation of other support or City requirements critical for project implementation ( <i>zoning/special use permit, other resources, etc.</i> ) _____ | -20                   |                      |                 |

**D. AFFORDABLE HOUSING**

**1. Multi-Unit Projects:**

**a. Priority Low-Income Population**

(Maximum of 30 pts. total for sub-items i-iii)

- i. Persons at or below 30% of area median income (25) \_\_\_\_\_
- ii. Persons at or below 50% of area median income (20) \_\_\_\_\_
- iii. Persons with special needs due to mental illness, disabling/terminal illness, incapacitating disability (20) \_\_\_\_\_

**b. % Affordable Rental Housing Units** (Use only one below)

- i. 100% low/mod units
- ii. 51-99% low/mod units
- iii. 33-50% low/mod units
- iv. under 33% low/mod units

**c. Project Readiness** (Maximum 10 pts. total for sub-items i-iv)

- i. Property appraisal submitted (2.5) \_\_\_\_\_
- ii. Site/building plans and drawings (2.5) \_\_\_\_\_
- iii. Reasonable budget/proforma (2.5) \_\_\_\_\_
- iv. Affirmative marketing plan (2.5) \_\_\_\_\_

**d. Prevents/Minimizes Displacement** of existing low-income HH

**f. Cost of Multi-Family Assistance:** Leverages production of new multi-family units at CDBG/HOME cost/unit of

- i. under \$15,000
- ii. over \$30,000

**g. Repayment of CDBG/HOME** (Use only one below)

- i. without interest
- ii. with interest
- iii. full payment within 5 years

**2. Homeownership Projects:**

**a. Priority Population**

(Maximum of 30 pts. total for sub-items i-ii)

- i. Persons at risk of housing loss (25) \_\_\_\_\_
- ii. Persons with special needs due to age, disabling/terminal illness, incapacitating disability (20) \_\_\_\_\_

**b. Type and Cost of Homeowner Assistance**

- i. Full rehab (\$45,000 of CD/HOME funds/unit maximum)
- ii. Emergency/partial repairs (\$15,000 CD funds/unit max.)
- iii. Provides mortgage, down payment, refinancing assistance
- iv. Leverages production of new homeownership units at CDBG/HOME cost/unit of:
  - a) under \$15,000
  - b) over \$30,000

**c. Prevents/Minimizes Displacement** of existing low-income HH

**3. Area of Impact**

- a. Supports City housing code enforcement
- b. Removes dilapidated housing stock
- c. Provides opportunities for mixed income residential communities

**4. Housing Affordability Period**

- a. Maintained for less than 5 years
- b. Maintained for 5 or more years

**5. Match Funding**

Provides documented non-City match to City \$:

- a. 2:1 or better
- b. 1.1:1 – 1.9:1
- c. No documented match

**6. Supports energy conservation**

|  | MAXIMUM POINTS | EARNED POINTS | COMMENTS |
|--|----------------|---------------|----------|
|  | 30             |               |          |
|  | 15             |               |          |
|  | 10             |               |          |
|  | 8              |               |          |
|  | -5             |               |          |
|  | 10             |               |          |
|  | 10             |               |          |
|  | -10            |               |          |
|  | 5              |               |          |
|  | 15             |               |          |
|  | 10             |               |          |
|  | 30             |               |          |
|  | 20             |               |          |
|  | 10             |               |          |
|  | 5              |               |          |
|  | 10             |               |          |
|  | 10             |               |          |
|  | 5              |               |          |
|  | 5              |               |          |
|  | 5              |               |          |
|  | 10             |               |          |
|  | 10             |               |          |
|  | 20             |               |          |
|  | 10             |               |          |
|  | -20            |               |          |
|  | 10             |               |          |



**E. ECONOMIC DEVELOPMENT**

1. Creates/retains permanent, private sector jobs at cost of \$10,000/job or less:
  - a. 1 - 25 jobs
  - b. 26 - 100 jobs
  - c. over 100 jobs
2. Creates/retains permanent, private sector jobs at \$20,000 or less per job:
  - a. 1 - 25 jobs
  - b. 26 - 100 jobs
  - c. over 100 jobs
3. Provides infrastructure improvements supportive of comprehensive development or revitalization efforts
4. Contributes to revitalization/stabilization of commercial areas within CDIA
5. Presence of active, self-sustaining merchants' association
6. Provides direct assistance to minority or female-owned business expansion/development or to micro-enterprises within CDIA
7. Provides documented non-City match (non-City to City \$s):
  - a. 3:1 or better
  - b. 2.1-2.9:1
  - c. 1.1-1.9:1
  - d. No match resources
8. Repayment of CD funds:
  - a. Without interest
  - b. Full repayment within 5 years
9. Tax base increase:
  - a. Provides for major or moderate tax increase within 3 years
  - b. Provides for major/moderate tax increase in more than 3 years

| MAXIMUM POINTS | EARNED POINTS | COMMENTS |
|----------------|---------------|----------|
| 10             |               |          |
| 15             |               |          |
| 20             |               |          |
| 5              |               |          |
| 8              |               |          |
| 10             |               |          |
| 15             |               |          |
| 10             |               |          |
| 5              |               |          |
| 10             |               |          |
| 15             |               |          |
| 10             |               |          |
| 5              |               |          |
| -8             |               |          |
| -5             |               |          |
| 10             |               |          |
| 15             |               |          |
| 10             |               |          |

**ECONOMIC DEVELOPMENT PROJECT TOTAL POINTS**

**F. HOMELESS FACILITIES/SPECIAL NEEDS HOUSING**

1. Facility Purpose (maximum of 20 points):
  - a. Creates new or expanded housing units or shelter beds
  - b. Supports/enhances the provision of critical supportive services
  - c. Assists to preserve existing well-operated housing units
2. Capital Cost (acquisition, rehab, conversion)
  - a. Minor under \$10,000 per bed
  - b. Major under \$20,000 per bed
3. Facility will still have significant unmet physical needs after project completion
4. Match Funding:
  - a. At least 50% of implementation costs from other sources
  - b. At least 25% of implementation costs from other sources
5. Non-profit shows stability/resources necessary to maintain/operate facility without additional City funds
6. Beneficiaries: (must be primary use for full points; can pro-rate to reflect partial service provided to one of these groups)
  - a. Families with children and/or minors
  - b. Difficult to serve chronic homeless (e.g. mentally disabled, substance abusers, those w/ criminal histories)
  - c. General street homeless (non chronic homeless)
7. Program includes substantive support services, directed to long-term impact, provided directly or through formalized linkages
8. Agency/partner is not a member of Pathways

| MAXIMUM POINTS | EARNED POINTS | COMMENTS |
|----------------|---------------|----------|
| 20             |               |          |
| 15             |               |          |
| 15             |               |          |
| 10             |               |          |
| 10             |               |          |
| -10            |               |          |
| 15             |               |          |
| 10             |               |          |
| 10             |               |          |
| 15             |               |          |
| 12             |               |          |
| 8              |               |          |
| 10             |               |          |
| -15            |               |          |

**HOMELESS FACILITIES PROEJCT TOTAL POINTS**

**G. ENVIRONMENTAL/COMMUNITY FACILITIES**

1. Creates/expands community facility/infrastructure in areas which are significantly underserved
2. Addresses serious problems/deficiencies in existing City infrastructure or City facility
3. Significantly increases direct or indirect costs to the City long term to maintain/operate
4. Significantly reduces air/noise pollution or other environmental nuisances
5. For non-City facilities or improvements:
  - a. Sponsoring organization lacks stability/resources to maintain/operate
  - b. Facility will negate or reduce need for direct City provision
  - c. Less than 1:1 match \$
  - d. No match \$
6. Impact of Project/Service:
  - a. Major (direct provision of significant services)
  - b. Moderate (indirect significant or direct but less significant services)
  - c. Minor (less significant, limited services)
7. Facility cost per client served annually:
  - a. Up to \$1,000
  - b. \$5,000 and above
8. Project addresses significant health or safety problem

| MAXIMUM POINTS | EARNED POINTS | COMMENTS |
|----------------|---------------|----------|
| 10             |               |          |
| 25             |               |          |
| -5             |               |          |
| 5              |               |          |
| -15            |               |          |
| 10             |               |          |
| -10            |               |          |
| -15            |               |          |
| 15             |               |          |
| 10             |               |          |
| 0              |               |          |
| 10             |               |          |
| -5             |               |          |
| 10             |               |          |

**ENVIRONMENTAL/COMMUNITY FACILITY PROJECT TOTAL POINTS** \_\_\_\_\_

**H. ACCESSIBILITY FOR PERSONS WITH DISABILITIES**

1. Use of facility or services:
  - a. High use
  - b. Moderate use
  - c. Low use
2. Facility is primarily used by low/moderate income persons
3. Services in facility are CDBG funded
4. Facility will still have significant unaddressed accessibility problems after project completion

| MAXIMUM POINTS | EARNED POINTS | COMMENTS |
|----------------|---------------|----------|
| 15             |               |          |
| 10             |               |          |
| 5              |               |          |
| 10             |               |          |
| 10             |               |          |
| -10            |               |          |

**I. HISTORIC PRESERVATION**

1. Preserves significant resource:
  - a. High use facility
  - b. Moderate use facility
2. Preservation enables reuse which will secure facility/structure
3. Assists in achieving adopted community plans

| MAXIMUM POINTS | EARNED POINTS | COMMENTS |
|----------------|---------------|----------|
| 15             |               |          |
| 10             |               |          |
| 15             |               |          |
| 10             |               |          |

**J. PLANNING/ADMINISTRATION CRITERIA**

1. Relates directly to Consolidated Plan goals
2. Meets specific HUD planning/compliance requirements
3. Lacks action plan for activities that can be implemented expeditiously with a specific funding strategy
4. Provides documented non-City match to City \$\$:
  - a. less than 1:1, but at least 0.25:1
  - b. 1:1 or better
  - c. no match

| MAXIMUM POINTS | EARNED POINTS | COMMENTS |
|----------------|---------------|----------|
| 10             |               |          |
| 12             |               |          |
| -10            |               |          |
| 5              |               |          |
| 8              |               |          |
| 0              |               |          |

**ACCESSIBILITY/HISTORIC/PLANNING/ADMIN PROJECT TOTAL POINTS** \_\_\_\_\_

**K. PUBLIC SERVICES**

1. Homeless Services
  - a. Emergency and transitional housing
    - 1) new for underserved
    - 2) pre-transitional, “enriched” shelter to enhance job readiness for single persons
  - b. Programs for families and children
  - c. Supportive services (case management, emergency assistance, specialized resources)
  - d. Sheltering and/or services for chronic homeless
  - e. Aftercare services for transition to independent living
2. Housing Related Programs
  - a. Seniors and those at-risk of homelessness or premature institutionalization
  - b. Special needs persons (non-elderly) to obtain/retain housing
  - c. Long-term rental assistance
3. Impact of project/service on clients:
  - a. Critical (meeting health/safety urgent needs)
  - b. Comprehensive (five or more significant services)
  - c. Major
  - d. Moderate
  - e. Minor
4. Reasonable Cost/Benefit Ratio:
  - a. critical/major up to \$3,000/service slot, *or* comprehensive residential up to \$16,000/service slot (bed), *or* moderate up to \$500/service slot
  - b. minor over \$50/service slot
5. Match Funding:
  - a. At least 50% of implementation costs from other sources
  - b. At least 25% of implementation costs from other resources
  - c. At least 10% of implementation costs from other sources
  - d. Less than 10% match resources
  - e. No match resources
6. Evidence of significant partnerships/collaborations in appropriate network of care
7. Unique niche in service arena

| MAXIMUM POINTS | EARNED POINTS | COMMENTS |
|----------------|---------------|----------|
| 15             |               |          |
| 5              |               |          |
| 5              |               |          |
| 15             |               |          |
| 10             |               |          |
| 10             |               |          |
| 10             |               |          |
| 10             |               |          |
| 15             |               |          |
| 5              |               |          |
| 15             |               |          |
| 15             |               |          |
| 10             |               |          |
| 5              |               |          |
| 0              |               |          |
| 10             |               |          |
| -10            |               |          |
| 15             |               |          |
| 10             |               |          |
| 5              |               |          |
| 0              |               |          |
| -5             |               |          |
| 5              |               |          |
| 5              |               |          |

**PUBLIC SERVICE PROJECT TOTAL POINTS**

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