**DANE COUNTY APPLICATION FOR** **2025 AFFORDABLE HOUSING DEVELOPMENT FUND**

This application should be used for project seeking Dane County **AHDF funds. Applications must be submitted electronically to DCDHS Division of Housing Access & Affordability by 12:00 p.m. (CST) on August 6, 2025.** Upload application materials to the [**Dane County AHDF Dropbox**](https://countyofdane.sharefile.com/r-r4d55d29b141a4d0d87f03a2f6628f5ca).

**APPLICATION SUMMARY**

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| **ORGANIZATION NAME** |  | |
| **MAILING ADDRESS**  If P.O. Box, include Street Address on second line |  | |
| **TELEPHONE** |  | **LEGAL STATUS** |
| **FAX NUMBER** |  | Private, Non-Profit  Private, For Profit  Other: LLC, LLP, Sole Proprietor  Federal EIN:  Unique Entity Identifier (UEI): |
| **NAME CHIEF ADMIN/ CONTACT** |  |
| **INTERNET WEBSITE**  **(if applicable)** |  |
| **E-MAIL ADDRESS** |  |

**PROJECT NAME:** Please list the project for which you are applying.

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| --- | --- | --- | --- |
| **PROJECT NAME** | **PROJECT CONTACT PERSON** | **PHONE NUMBER** | **E-MAIL** |
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**FUNDS REQUESTED:** Please list the amount and source of funding for which you are applying.

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| --- | --- | --- |
| TOTAL PROJECT COST | AMOUNT OF AHDF FUNDS REQUESTED | PECENT OF AHDF FUNDS TO TOTAL PROJECT COST |
| $ | $ |  |

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| --- | --- | --- |
|  |  |  |
| Signature of Chief Elected Official/Organization Head |  | Title |
|  |  |  |
| Printed Name |  | Date |

**PROJECT DESCRIPTION**

1. **PROJECT NAME AND LOCATION:** Indicate the name, address, and census tract where the project will be located. Attach maps to the application indicating the location of the proposed project.

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| --- | --- |
| Project Name: |  |
| Project Address: |  |
| City, State, Zip: |  |
| Parcel Number: |  |
| Census Tract: |  |

1. **JURISDICTION:** Indicate the name of the jurisdiction where the project will be located, i.e., City, Town, or Village. Is the jurisdiction supportive of the project? Describe any meetings that have been held with municipal staff, applicable municipal committees, and neighborhood/community groups.

1. **MUNICIPAL PARTNERSHIPS:** Please describe any partner resources the municipality will be dedicating to support your project including but not limited to tax increment financing; reducing or eliminating permitting or impact fees; local housing funds; density bonus; land dedication or reduced land costs, etc.

Is the project eligible for municipal dedicated affordable housing resources (e.g. affordable housing funds)? If not please indicate why the project is not eligible.

1. **ZONING:** Provide the current zoning classifications of the site and describe any changes in zoning, variances, special or conditional use permits, or other items that are needed to develop this proposal. Indicate if the project is consistent with any local comprehensive plans, and the anticipated timeline for obtaining any necessary approvals.

1. **PROJECT DESCRIPTION**: Provide a detailed description of the project. If the project will preserve an existing low-income housing project, include if the project has, and will continue, to have a rent assistance contract; or if the project includes income and rent-restricted units.

What is the proposed affordability period for the affordability period for the project?

1. **RELOCATION**: Will any businesses, including churches and non-profits, or residential tenants (owner or rental) be displaced temporarily or permanently? If so, please describe the relocation requirements, relocation plan, and relocation assistance that you will implement or have started to implement.

1. **CAPITAL NEEDS**: For projects that include rehabilitation, have you completed a capital needs assessment for this property? If so, summarize the scope and cost; and attach a copy of the capital needs assessment.

1. **GREEN TECHNOLOGIES/SUSTAINABILITY:** Indicate if the project will be pursuing any of the listed energy and sustainability standards, beyond the minimum detailed in the 2025 Affordable Housing Development Fund Guidelines.

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| --- | --- |
| Yes | No |
|  |  |

If yes, indicate which certification will be pursued:

|  |  |  |
| --- | --- | --- |
| **Tier 1** | | |
| *New Construction* | | |
|  | | Enterprise 2020 Green Communities Certification Plus |
|  | | LEED Gold/Platinum Certification |
|  | | Wisconsin Green Built Communities Gold Plus |
|  | | Passive House Institute US PHIUS Core. |
| *Rehabilitation* | | |
|  | Enterprise 2020 Green Communities for Moderate & Substantial Rehab Certification Plus | |
|  | Wisconsin Green Build Homes Gold Plus | |
|  | Passive House Institute US – PHIUS Core Revive | |
|  | **Tier 2- Net Zero Certification** | |
|  | *New Construction* | |
|  | Enterprise 2020 Green Communities Criteria Certification Plus via Criterion 5.4b | |
|  | LEED Zero Energy | |
|  | Wisconsin Green Built Communities Gold Net Zero | |
|  | Passive House Institute US PHIUS Zero | |
|  | *Rehabilitation* | |
|  | Enterprise 2020 Green Communities for Moderate & Substantial Rehab Certification Plus via Criterion 5.2b | |
|  | Wisconsin Green Built Homes Gold Net Zero | |
|  | Passive House Institute US – PHIUS Core Zero Revive | |

If a project has selected a Tier 2 – Net Zero certification, please detail how the project will achieve the certification, including impacts on financing and timeline.

1. **WORK PLAN WITH TIMELINE AND MILESTONES:** In the space below, provide a work plan for how the project will be organized, implemented, and administered. Include a timeline and accomplishments from initiation through project completion. Add in extra quarters as needed. Examples of milestones are: zoning approval, acquisition, bid packages released, bids awarded, site preparation, excavation, construction begins, substantial completion, certificate of occupancy, lease-up begins, etc.

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| **ON OR BEFORE** | **MILESTONES** |
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1. **UNITS:** In the space below, please list each site (street address) and building where the work will be undertaken. For each address, list the number of units by size, income category, etc. Use additional pages as needed.

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| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **ADDRESS #1:** | |  | | | | | | | | | | |
|  | **# of Bedrooms** | | | | | | | **Projected Monthly Unit, including Utilities** | | | | |
| **% of County Median Income (CMI)** | **Total # of Units** | | **# of Studios** | **# of 1 BRs** | **# of 2 BRs** | **# of 3 BRs** | **# of 4+ BRs** | **$ Rent for Studios** | **$ Rent for 1 BRs** | **$ Rent for 2 BRs** | **$ Rent for 3 BRs** | **$ Rent for 4+ BRs** |
| **≤30%** |  | |  |  |  |  |  |  |  |  |  |  |
| **40%** |  | |  |  |  |  |  |  |  |  |  |  |
| **50%** |  | |  |  |  |  |  |  |  |  |  |  |
| **60%** |  | |  |  |  |  |  |  |  |  |  |  |
| **80%** |  | |  |  |  |  |  |  |  |  |  |  |
| **Affordable Sub total** |  | |  |  |  |  |  |  |  |  |  |  |
| **Market** |  | |  |  |  |  |  |  |  |  |  |  |
| **Total Units** |  | |  |  |  |  |  | Notes: |  | | | |

\*40% = 31 to 40% CMI, 50%=41%-50% CMI, 60%=51-60% CMI, 80%=61-80% CMI, Market = ≥81%

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| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **ADDRESS #2:** | |  | | | | | | | | | | |
|  | **# of Bedrooms** | | | | | | | **Projected Monthly Unit, including Utilities** | | | | |
| **% of County Median Income (CMI)** | **Total # of Units** | | **# of Studios** | **# of 1 BRs** | **# of 2 BRs** | **# of 3 BRs** | **# of 4+ BRs** | **$ Rent for Studios** | **$ Rent for 1 BRs** | **$ Rent for 2 BRs** | **$ Rent for 3 BRs** | **$ Rent for 4+ BRs** |
| **≤30%** |  | |  |  |  |  |  |  |  |  |  |  |
| **40%** |  | |  |  |  |  |  |  |  |  |  |  |
| **50%** |  | |  |  |  |  |  |  |  |  |  |  |
| **60%** |  | |  |  |  |  |  |  |  |  |  |  |
| **80%** |  | |  |  |  |  |  |  |  |  |  |  |
| **Affordable Sub total** |  | |  |  |  |  |  |  |  |  |  |  |
| **Market** |  | |  |  |  |  |  |  |  |  |  |  |
| **Total Units** |  | |  |  |  |  |  | Notes: |  | | | |

\*40% = 31 to 40% CMI, 50%=41%-50% CMI, 60%=51-60% CMI, 80%=61-80% CMI, Market = ≥81%

What percentage of maximum LIHTC rents are used for 50, 60, and 80% units? Describe the project’s policy toward limiting rent increases for lease renewals? How will the project ensure long-term tenants are protected from significantly rising rent increases that may be allowed under published rent limits?

1. **SITE AMENITIES:** Check all that apply.

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| --- | --- |
|  | Community Building, square feet: |
|  | Community Room, square feet: |
|  | Garages, number:       and monthly rent: |
|  | Surface parking, number:       and monthly rent: |
|  | Underground parking, number       and monthly rent: |

1. **OTHER SITE AMENITIES**:In the following space, describe the other site amenities for tenants and/or their guests.

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**LOCATION**

1. **NEIGHBORHOOD AMENITIES:** Describe the neighborhood in which the project will be located noting access to social, recreational, educational, commercial, and health facilities and services and other municipal facilities and services.

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Identify the distance the following amenities are from the proposed site.

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| --- | --- | --- |
| **Type of Amenities & Services** | **Name of Facility** | **Distance from Site** |
| Full-Service Grocery Store |  |  |
| Public Elementary School |  |  |
| Public Middle School |  |  |
| Public High School |  |  |
| Job-Training Facility, Community College, or Continuing Education Programs |  |  |
| Childcare |  |  |
| Public Library |  |  |
| Neighborhood, Community, or Senior Center |  |  |
| Full Service Medical Clinic or Hospital |  |  |
| Pharmacy |  |  |
| Public Park or Hiking/Biking Trails |  |  |
| Banking |  |  |
| Retail |  |  |
| Other (list the amenities) |  |  |

1. **TRANSPORTATION:** Identify the travel time and cost via public transportation or public automobile from the neighborhood to places of employment providing a range of jobs for lower-income workers.

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1. **TENANT ACCESS TO PROPERTY MANAGEMENT:** Describe access to property management staff on site (e.g., include anticipated office hours of property management, if staff will live on-site.)

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## **ALTERNATIVES TO EVICTION:** Describe the project’s approach to successfully utilizing alternatives to eviction, both pre- and-post filing, such as payment plans, mediations, etc. to avoid evictions.

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## **LANGUAGE & INFORMATION ACCESS:** Describe project’s policy and procedures for ensuring services and information will be made available to all applicants and tenants, including those with limited English proficiency and individuals who may have physical, hearing, speech, or visual impairments that require special accommodations.

**PROJECT APPROACH**

1. **PARTNERHIPS:** In the space below, provide information on any partnerships that have been or will be formed in order to ensure the success of the project.

1. **VOUCHER HOLDER ACCESS:** Will the project commit to lowering rent on units affordable to households at 80% AMI to meet public housing authority payment standards for otherwise eligible applicants who are voucher holders?

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| Yes | No |
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1. **FAIR TENANT SELECTION CRITERIA**: Will the project incorporate tenant selection criteria detailed below? **Acceptance of all criteria is required for funding.**

General Screening Process – will not deny applicants based on the following:

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| --- | --- | --- | --- |
|  | Yes | No |  |
| **All REQUIRED FOR FUNDING** |  |  | Inability to meet a minimum income requirement if the applicant can demonstrate the ability to comply with the rent obligation based on a rental history of paying at an equivalent rent to income ratio for 24 months |
|  |  | Lack of housing history |
|  |  | Membership in a class protected by Dane County fair housing ordinances and non-discrimination ordinances in the municipality where the project is located. |
|  |  | Wisconsin Circuit Court Access records |
|  |  | Inability to meet financial obligations other than housing and utilities necessary for housing (gas, electric, water). |
|  |  | Credit score |
|  |  | Information on credit report that is disputed, in repayment, or unrelated to a past housing or utility (gas, electric, and water only) obligations. |
|  |  | Owing money to a prior landlord or negative rent payment history if the tenant’s housing and utility costs were more than 50% of their monthly income. |
|  |  | Owing money to a prior landlord or negative rent or utility payment history if applicant does one of the following: (1) establishes a regular record of repayment of the obligation; 2) signs up for automatic payment of rent to the housing provider; or (3) obtains a representative payee. |
|  |  | Any eviction filing if meets any of the following: (1) eviction filing was dismissed or resulted in a judgement in favor of the applicant; (2) eviction filing which was settled with no judgement or write of recovery issued (e.g. stipulated dismissal); or (3) eviction filing that resulted in judgement for the landlord more than two years before the applicant submits the application. |
|  |  | Criminal activity, except: (i) a criminal conviction within the last two years for violent criminal activity or drug related criminal activity resulting in a criminal conviction, ​and (ii) if the program or project is federally assisted, criminal activity for which federal law currently requires denial. (*Violent criminal activity* is defined in 24 C.F.R § 5.100 and means any criminal activity that has as one of its elements the use, attempted use, or threatened use of physical force substantial enough to cause, or be reasonably likely to cause, serious bodily injury or property damage. “Drug related criminal activity is defined in Wis. Stat. s. 704.17(3m)(a)(2). “Drug-related criminal activity” means criminal activity that involves the manufacture or distribution of a controlled substance. “Drug-related criminal activity” does not include the manufacture, possession, or use of a controlled substance that is prescribed by a physician for the use of by a disabled person, as defined in s. 100.264(1)(a), and manufactured by, used, by or in the possession of the disabled person or in the possession of the disabled person’s personal care worker or other caregiver. ) |

1. **DENIAL PROCESS**: Will the project incorporate the denial process detailed below? **Acceptance is required for funding.**

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| Yes | No |
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|  | Prior to a denial based on a criminal record, the housing provider shall provide the applicant access to a copy of the criminal record at least five days prior to the issuance of denial and an opportunity to dispute the accuracy and relevance of the report, which is already required of HUD assisted housing providers. See 24 C.F.R. § 982.553(d), which applies to public housing agencies administering the section 8 rent assistance program. |
|  | Prior to a denial based on a criminal record, the housing provider shall provide the applicant the opportunity to exclude the culpable family member as a condition of admission of the remaining family members. |
|  | Prior to a denial decision, the housing provider is encouraged to meet with the applicant to review their application and make an individualized determination of their eligibility, considering: (a) factors identified in the provider’s own screening policies, (b) if applicable, federal regulations, and (c) whether the applicant has a disability that relates to concerns with their eligibility and an exception to the admissions rules, policies, practices, and services is necessary as a reasonable accommodation of the applicant’s disability. In making a denial decision, the housing provider shall consider all relevant circumstances such as the seriousness of the case, the extent of participation or culpability of individual family members, mitigating circumstances related to the disability of a family member, and the effects of denial on other family members who were not involved in the action or failure. |
|  | The property manager will base any denial on sufficient evidence. An arrest record or police incident report is not sufficient evidence. Uncorroborated hearsay is not sufficient evidence. |
|  | Denial notices shall include the following:  a) The reason for denial with details sufficient for the applicant to prepare a defense, including:  i) The action or inaction forming the basis for the denial,  ii) Who participated in the action or inaction,  iii) When the action or inaction was committed, and  iv) The source(s) of information relied upon for the action or inaction.  b) Notice of the applicant’s right to a copy of their application file, which shall include all evidence upon which the denial decision was based.  c) Notice of the applicant’s right to copies of the property manager’s screening criteria.  d) Notice of the right to request an in-person appeal meeting on the denial decision by making a written request for a hearing within 45 days. The housing provider is not required to hold the unit open while the appeal is pending.  e) Notice of the right to have an advocate present at the in-person appeal meeting and of the right to be represented by an attorney or other representative.  f) Notice of the right to present evidence in support of their application, including, but not limited to evidence related to the applicant’s completion or participation in a rehabilitation program, behavioral health treatment, or other supportive services. |
|  | If the applicant requests an in-person appeal meeting, the hearing will be conducted by a person who was not involved in or consulted in making the decision to deny the application nor a subordinate of such a person so involved. |
|  | The in-person appeal meeting shall be scheduled within ten working days of the request, unless the applicant requests a later date. |
|  | A written decision on the application shall be provided to the applicant within ten working days after the in-person appeal meeting. |

1. **TENANCY ADDENDUM:** Affirm the project will include the followingprovisions within all tenant leases or as an addendum to all tenant leases? **This is required to be eligible for project funding.**

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| Yes | No |
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| **a.** | **Security Deposits.** The amount of a security deposit shall not be more than one month’s rent. |
| **b.** | **Late Fees and Other Fees.** Late fees must be set forth in the rental agreement. Late fees shall not exceed 5% of the tenant’s portion of the monthly rent. |
| **c.** | **All other fees.** All other fees must be directly related to the cost for a specific amenity or service provided to the tenant and comply with all applicable laws. Non-essential services must be transparently identified, and allow tenant to opt out of services if tenant chooses. Junk fees are prohibited and defined as unnecessary, deceptive, or poorly disclosed charges not tied to a legitimate service or cost, and that place an undue burden on tenants. (For example, application fees above $25 dollars pursuant to Wis. Stat. § 704.085, compounding fees, penalty fees, eviction filing fees, attorney’s fees, processing fees, convenience fees for payment, pest control fees, insurance fees, administrative fees or any fees that encompass basic tenancy service.) |
| **d.** | **Rights of Youth to Access Common Spaces.** Youth under the age of 18 are allow to use and enjoy common areas without supervision. This does not preclude reasonable rules in ensure the safety of children and youth. |
| **e.** | **Written Notice for Termination of Tenancy.** Landlord or landlord’s agent must serve written notice upon the tenant specifying the grounds (e.g., the dates of relevant event/s, names of parties, reasoning, source of information and relevant documents) for the action at least 30 days before the termination of tenancy, unless shorter timeframe is required by federal funding. Termination for imminent threat of serious physical harm under WI Statute § 704.16(3) and criminal activity under WI Statute § 704.17(3m) are exempted from this requirement. |
| **f.** | **Good Cause for Termination.** A tenancy may not be terminated during or at the end of the lease unless there is good cause. Good cause is defined in include the following: (i) a serious violation of the lease; (ii) repeated minor violations of the lease; or (iii) a refusal to re-certify program eligibility. Repeated means a pattern of minor violations, not isolated incidents. Termination notices and procedures shall comply with Chapter 704 of Wisconsin Statutes and federal law, when applicable. Written notice is required for non-renewal and shall include the specific grounds for non-renewal and the right of the tenant to request a meeting to discuss the non-renewal with the landlord or landlord’s property management agent within fourteen (14) days of the notice. If requested, the landlord or property management agent will meet with the tenant to discuss the non-renewal, allow the tenant to respond to the alleged grounds for non-renewal, and pursue a mutually acceptable resolution. |
| **g.** | **Reasonable Guest Rules.** Tenants have the right to have guests. In the event the property management establishes rules related to guests, they must be reasonable. Unreasonable rules include, but are not limited to the following: (1) Prior authorization of guests by the property management, unless the guest is staying for an extended period of time (e.g. more than 2 weeks); (2) Prohibition on overnight guests; (3) Requiring that the resident be with the guest at all times on the property. (4) Requiring guests to show ID unless requested by the tenant. (5) Subjecting caregivers, whether caring for a child or children, or an adult with disabilities, to limitations on the number of days for guests.  Landlord may ban a person who is not a tenant from the rental premises if the person has committed violent criminal activity or drug related criminal activity at rental premises. No person shall be banned from the rental premises without the consent of the tenant unless the following have taken place:    (1) A notice of the ban is issued to the tenant stating the:  (a) name of the person banned,  (b) grounds for the ban including, (i) the specific facts detailing the activity resulting in the ban; (ii) the source of the information relied upon in making the ban decision; and (iii) a copy of any criminal record reviewed when making the ban decision; and  (c) the right of the tenant to have a meeting to dispute the proposed ban, discuss alternatives to the ban, and address any unintended consequences of the proposed ban.  (2) If requested, a hearing on the ban has taken place to provide the tenant an opportunity to dispute the proposed ban, discuss alternatives of the ban, and address any unintended consequences of the proposed ban.  A tenant may not invite or allow a banned person as a guest on the premises, provided the Landlord has followed the proper procedure and given notice to Tenant as set forth herein.  A tenant who violates the guest policy may be given a written warning detailing the facts of the alleged violation. The written warning shall detail the violation, and warn the tenant that repeated violations may result in termination of tenancy. Tenants that repeatedly violate the guest policy, (e.g. three (3) or more violations within a twelve (12) month period) may be issued a notice of termination in accordance with state and federal law.  Nothing in this policy limits a person’s right to pursue a civil order for protection against another individual. |
| **h.** | **Parking Policies.** Parking policies and practices must comply with applicable laws. Vehicles shall not be towed to a location that is more than 6 miles from the rental premises, unless there is not a towing company with a tow location available within 6 miles. |

1. **PARTNERING TO END HOMELESSNESS:** In the space below, indicate the project’s willingness to partner with Homeless Services Consortium member agencies and to end homelessness for individuals and /or families by providing a preference for households experiencing homelessness. To be eligible for funding, projects must be willing to target a minimum of 20% of the total project units for referrals from Homeless Services Consortium agencies.

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| --- | --- | --- |
| **Total # of Project Units** | **# of Units Targeted to Individuals/Families experiencing homelessness** | **% of Units Targeted to Individuals/Families experiencing homelessness** |
|  |  |  |

Name of Supportive Services Provider for Coordinated Entry referrals?

Does identified referral partner have access to Coordinated Entry (CE)? If not, how will CE referrals be made?

What support will be available to CE referrals during the application process (e.g., transportation to application site, assistance gathering required documents).

What additional barriers can the project remove to ensure households experiencing homelessness are able to access targeted units (e.g. waiving of screening criteria unrelated to compliance with Section 42 LIHTC program).

# **SUPPORTIVE SERVICES:**

## **SUPPORTIVE SERVICES SUMMARY**: Please provide a summary of supportive services below. Subsequent questions will ask for more detailed information:

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| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Supportive Services Partner: |  | | | | | | | |
| Total annual budget for supportive services at project: | |  | | | | | | |
| Amount of annual funding **project and/or developer** will provide directly to supportive services at project: | | | |  | | | | |
| Full-Time Equivalent position(s) dedicated to providing services at project: | | | | |  | | | |
| Number of estimated weekly on-site hours of supportive services provided by identified partner: | | | | | | |  | |
| Project will provide on-site services in a dedicated space: | | |  | Yes | |  | | No |

## **SUPPORTIVE SERVICES**: Describe the experience and qualifications of the organization that will be providing supportive services.

## Complete the table for supportive units proposed:

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
|  | **# of Bedrooms** | | | | | |
| **% of County Median Income (CMI)** | **Total # of Units** | **# of Studios** | **# of 1 BRs** | **# of 2 BRs** | **# of 3 BRs** | **# of 4+ BRs** |
| **≤30%** |  |  |  |  |  |  |
| **40%** |  |  |  |  |  |  |
| **50%** |  |  |  |  |  |  |
| **60%** |  |  |  |  |  |  |

## **PREFERENCES:** Dane County AHDF requires a minimum of 20% of units provide a preference for households experiencing homelessness. Will the project require that these households meet additional preferences? Indicate all anticipated preferences below.

|  |  |  |  |
| --- | --- | --- | --- |
|  | Persons with disabilities |  | Veterans |
|  | Household experiencing chronic homelessness |  | Individuals recovering from physical abuse, domestic violence, dating violence, sexual assault or stalking |
|  | Households who have child welfare or youth justice involvement |  | Persons with arrest and conviction records |
|  | Other: |  |  |

If the project will provide a preference for more than one target population, describe the approach that will be taken to apply preferences to tenant selection.

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## **SCOPE OF SERVICES:** Detail the services that will be provided to tenants and approaches supportive service partner(s) will use to address the needs of tenant population. Indicate if services are targeted only to the supportive housing units, or are available to the broader tenant population.

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## **SERVICES STRATEGIES:** Detail strategies the services partner(s) will use to engage tenants to support their housing retention, including tenants who have potential lease violations or whose housing is in jeopardy.

## **SERVICES STAFF TRAINING:** Detail specific trainings that staff are provided/will be provided and their frequency, in particular, trainings focused on case management basics, community networking, progressive engagement, trauma informed care, harm reduction, de-escalation, and/or trainings related to cultural competency.

## **TENANT ACCESS:** Describehowtenants will access services. For example, will services be on-site at the development in designated space, or by referral to off-site community supports.

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If services provided are referral to off-site community supports, please detail how tenants will receive information on supportive services that are available to them before and after needs arise:

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## **SERVICES SCHEDULE**: Detail the frequency of services provided and/or a proposed schedule of when on-site services are available to tenants (e.g., Monday – Friday, 8:30-4:30 p.m.):

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## **SERVICES COLLABORATION:** How will the supportive services partner identify and collaborate with other community service providers in the target area:

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## **SUPPORTIVE SERVICES FUNDING**: Identify sources that will be used to fund supportive services at the development. Describe funding structure, including annual amounts, and all proposed sources.

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| --- | --- | --- | --- |
|  | Portion of developer fee |  | Annual Operating Support |
|  | Payments out of available cash flow |  | Other: |

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## **PERFORMANCE DATA:** Provide relevant performance data that provides insight into the supportive service partner’s experience serving the target tenant population(s), and the outcomes for their tenants. Metrics could include the number of individuals served in a related program in a year, housing retention rates for individuals served in that program, connections to employment, etc.

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## **PROPERTY MANAGEMENT AND SERVICES PARTNER COLLABORATION**: Describe how the supportive services partner, property manager, and the respondent will work together to ensure the best outcomes for tenants, such as housing retention (e.g. regular meetings between property management staff and supportive services provider to identify potential issues before they rise to the level of a noticed lease violation, joint training on training on trauma informed services or de-escalation). If applicable, provide an example of how this partnership has worked to keep a tenant housed in other developments

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**EXPERIENCE AND QUALIFICATIONS**

1. **EXPERIENCE AND QUALIFICATIONS**: Describe the experience and qualifications of your organization related to the development of multifamily housing for low-income households**.**

1. **PROPERTY MANAGEMENT:**  Describe the experience and qualifications of the organization that will be handling the ongoing property management.

If a Property Manager has yet to be identified, please describe how one will be selected.

**PROJECT FINANCING**

1. **BUDGET SUMMARY:** Indicate the sources and uses of all funds for this project.

The County requires that the developer defer 40% of the developer fee as a financing source. If the sources and uses for a project indicate that less than 40% of the developer fee has been deferred, the amount requested will be reduced by the difference between the percentage of the developer fee deferred and the required 40%

For example: Assume the developer fee is $1,000,000 and $350,000, or 35% of the fee is deferred. Also assume the request for county funding is $500,000. The actual award would be reduced by $50,000 and the project would receive an award of $450,000, if selected.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| SOURCE | AMOUNT |  | USES | AMOUNT |
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|  |  |  |  |  |
| TOTAL |  |  | TOTAL |  |

## Which of the identified sources have been secured?

## If the project will be applying for tax credits, please indicate which applications will be submitted (e.g. 4%, 9%, senior), and the proposed timeline for submittal.

1. **FUNDS NEEDED:** In the space below, please describe why AHDF funds are needed to ensure the viability of this project.

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1. **OPERATING BUDGET:** Complete the 20-Year Operating Budget, identifying the income and expenses, use additional pages as necessary. An Excel file may be submitted in lieu of the Operating Budget provided that it contains all of the same column and row headers.

**OPERATING BUDGET**

|  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | **Year 1** | **Year 2** | **Year 3** | **Year 4** | **Year 5** | **Year 6** | **Year 7** | **Year 8** | **Year 9** | **Year 10** |
| **INCOME** |  |  |  |  |  |  |  |  |  |  |
| Gross Potential Rent |  |  |  |  |  |  |  |  |  |  |
| Vacancy |  |  |  |  |  |  |  |  |  |  |
| Other Income |  |  |  |  |  |  |  |  |  |  |
| Total Income |  |  |  |  |  |  |  |  |  |  |
| **OPERATING EXPENSES** |  |  |  |  |  |  |  |  |  |  |
| Marketing |  |  |  |  |  |  |  |  |  |  |
| Payroll |  |  |  |  |  |  |  |  |  |  |
| Other Administrative Costs |  |  |  |  |  |  |  |  |  |  |
| Management Fees |  |  |  |  |  |  |  |  |  |  |
| Utilities |  |  |  |  |  |  |  |  |  |  |
| Security |  |  |  |  |  |  |  |  |  |  |
| Maintenance Expenses |  |  |  |  |  |  |  |  |  |  |
| Property Taxes |  |  |  |  |  |  |  |  |  |  |
| Supportive Services |  |  |  |  |  |  |  |  |  |  |
| Insurance |  |  |  |  |  |  |  |  |  |  |
| Reserves for Replacement |  |  |  |  |  |  |  |  |  |  |
| Total Operating Expenses |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |
| Net Operating Income |  |  |  |  |  |  |  |  |  |  |
| Debt Service |  |  |  |  |  |  |  |  |  |  |
| Asset Management |  |  |  |  |  |  |  |  |  |  |
| Cash Flow |  |  |  |  |  |  |  |  |  |  |
|  | **Year 11** | **Year 12** | **Year 13** | **Year 14** | **Year 15** | **Year 16** | **Year 17** | **Year 18** | **Year 19** | **Year 20** |
| **INCOME** |  |  |  |  |  |  |  |  |  |  |
| Gross Potential Rent |  |  |  |  |  |  |  |  |  |  |
| Vacancy |  |  |  |  |  |  |  |  |  |  |
| Other Income |  |  |  |  |  |  |  |  |  |  |
| Total Income |  |  |  |  |  |  |  |  |  |  |
| **OPERATING EXPENSES** |  |  |  |  |  |  |  |  |  |  |
| Marketing |  |  |  |  |  |  |  |  |  |  |
| Payroll |  |  |  |  |  |  |  |  |  |  |
| Other Administrative Costs |  |  |  |  |  |  |  |  |  |  |
| Management Fees |  |  |  |  |  |  |  |  |  |  |
| Utilities |  |  |  |  |  |  |  |  |  |  |
| Security |  |  |  |  |  |  |  |  |  |  |
| Maintenance Expenses |  |  |  |  |  |  |  |  |  |  |
| Property Taxes |  |  |  |  |  |  |  |  |  |  |
| Supportive Services |  |  |  |  |  |  |  |  |  |  |
| Insurance |  |  |  |  |  |  |  |  |  |  |
| Reserves for Replacement |  |  |  |  |  |  |  |  |  |  |
| Total Operating Expenses |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |
| Net Operating Income |  |  |  |  |  |  |  |  |  |  |
| Debt Service |  |  |  |  |  |  |  |  |  |  |
| Asset Management |  |  |  |  |  |  |  |  |  |  |
| Cash Flow |  |  |  |  |  |  |  |  |  |  |