



Bloomington Housing Authority

1007 North Summit, Bloomington, Indiana 47404
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**HOUSING AUTHORITY OF THE
CITY OF BLOOMINGTON**

PROJECT-BASED VOUCHER PROGRAM

REQUEST FOR PROPOSALS (RFP)

ISSUED JULY 31st, 2020

SUBMISSION DEADLINE: 4:00 P.M., MONDAY, AUGUST 31ST, 2020

Housing Authority of the City of Bloomington

Project Based Voucher Program

REQUEST FOR PROPOSALS (RFP) INSTRUCTIONS

I. INTRODUCTION

The Housing Authority of the City of Bloomington (BHA) invites property owners in Monroe County to submit a written proposal demonstrating their project eligibility, qualifications and interest in securing Project Based Vouchers that will serve eligible individuals or families. Project Based Voucher (PBV) assistance provides rental subsidies paid on behalf of eligible families who live in units that are contracted under the program. In this RFP, the Housing Authority of the City of Bloomington (BHA) seeks proposals from owners/developers who will commit up to 25 units of their rental housing to receive assistance through project based vouchers.

The Housing Authority will offer owners of selected quality housing an allocation of vouchers directed to the target population(s) that can be attached to designated units of their rental housing. Owners will gain the benefit of a multi-year contract with BHA ensuring a Section 8 approved rent for their properties for an extended period. Eligible individuals and families from BHA's waiting list who are extremely low income (households at 30% Area Median Income or below) and very low-income (households at 50% Area Median Income or below) will gain the benefit of quality affordable housing.

Please review these instructions and review and complete the application and budget forms (available as a separate documents which may be downloaded at www.bhaindiana.net). If you have any questions about the PBV Program or this Request for Proposals (RFP), please email Daniel Harmon, HCV Program Manager, at dharmon@blha.net

II. HOUSING AUTHORITY PROFILE

The Bloomington Housing Authority is a public housing agency whose main office is located at 1007 N. Summit Street, Bloomington, Indiana 47404. BHA administers public funds using available resources in a manner which allows the Housing Authority to offer a variety of affordable housing opportunities and supportive services that foster stability and self-sufficiency. The primary means to provide this assistance is through the U.S. Department of Housing and Urban Development (HUD)-funded Section 8 Housing Choice Voucher (HCV) program. BHA currently assists over 1,300 families in Monroe County through the HCV program.

III. PROJECT BASED VOUCHER PROGRAM OVERVIEW

A. Program Administration

The Project-Based Voucher (PBV) Program is administered through HUD regulations and the policies outlined in BHA's Administrative Plan. The Code of Federal Regulations Title 24, Part 983, which outlines the primary governing regulations of the PBV program, is available for review online at www.gpoaccess.gov. The Housing Authority's Administrative Plan is available for review online at www.bhaindiana.net or at the Housing Authority office located at 1007 N. Summit Street, Bloomington, Indiana 47404.

B. Purpose

The purpose of the PBV Program is to encourage property owners to attach Project Based Voucher assistance to rental property in order to preserve and increase the number of housing units serving low-income persons within Monroe County.

C. Funding

Housing Authorities may use up to 20% of their voucher allocation for a PBV program. Funding for project-based assistance comes from funds already obligated by HUD to a Housing Authority's Housing Choice Voucher Program. This funding is subject to federal reauthorization.

D. Description of PBV Program

Under this PBV Program, BHA will provide assistance to select existing, rehabilitated or new construction housing developments (as defined by HUD) willing to designate a portion of their units to low-income populations. HUD defines PBV housing developments as follows:

1. Existing housing is housing that already exists and that (upon BHA inspection of its designated PBV units) substantially complies with the Housing Quality Standards (HQS) on the proposal selection date.
2. Rehabilitated housing is housing that exists on the proposal selection date, but whose designated PBV units do not substantially comply with the HQS on that date, and are developed, pursuant to an Agreement between BHA and the owner for use under the PBV program.
3. New construction housing is housing that does not exist on the proposal selection date and is developed after the date of selection pursuant to an Agreement between BHA and the owner for use under the PBV program.

HUD-established HQS specifications are described in the Code of Federal Regulations, Chapter 24, Section 982.401. All PBV assisted units must meet HQS and other requirements before rental assistance can commence.

Upon completion of a successful Housing Quality Standards inspection, BHA and the property owner will enter into a Housing Assistance Payments (HAP) contract for specified units for a term of up to 20 years. The HAP contract establishes the initial rents for the units and describes the responsibilities of the Housing Authority and the owner. Rental assistance (which is based on each household's income) is provided while the units are occupied by eligible individuals or families referred from BHA's waiting list. HAP contract renewal after the initial term may occur at the sole option of the Housing Authority for such period (not exceeding 20 years) as the Authority determines appropriate to expand housing opportunities and to achieve long-term affordability of the assisted housing. All HAP contracts and subsequent renewals are contingent upon the future availability of appropriated HUD funds for the HCV Program.

E. Cap on Number of PBV Units per Project

Up to twenty-five percent (25%) of a project's units may be project-based. This cap will not apply if the PBV units over the 25% cap are leased only to elderly and/or disabled families.

F. Occupancy and Vacancy of PBV Units

Project-based units must be leased only to families eligible for Section 8 assistance for the term of the HAP contract. For existing and rehabilitation projects, designated PBV units that are occupied on the proposal selection date must be occupied by a family eligible for Section 8 PBV assistance (see income limits below). If the family is not eligible, the unit cannot be selected for PBV assistance.

FY2020 Income Limits Effective April 1, 2020								
	1 Person	2 Persons	3 Persons	4 Persons	5 Persons	6 Persons	7 Persons	8 Persons
30% of Area Median Income (Extremely Low)	\$15,750	\$18,000	\$21,720	\$26,200	\$30,680	\$35,160	\$39,640	\$49,450
50% of Area Median Income (Very Low)	\$26,250	\$30,000	\$33,750	\$37,450	\$40,450	\$43,450	\$46,450	\$49,450

PBV units that are vacant at the time of project selection or become vacant at any time during the term of the PBV HAP contract will be filled with eligible applicants referred by the owner to the applicable BHA Project-Based Voucher waiting list. The owner and tenant of a Project-Based unit must notify BHA immediately if a tenant will be moving from a PBV unit. The Housing Authority will notify applicants from its waiting list and refer interested individuals/families to the owner for selection. Once an applicant is approved by the owner, the owner will refer them back to BHA for final eligibility determination.

G. Ineligible Units

Certain special housing types are **not** eligible for project-based assistance. These include transitional housing, owner-occupied units, shared housing, public housing, Section 202 housing, Section 236 housing (exception made for units subsidized with Section 236 interest reduction payments) and units occupied by families who are not eligible for participation in the PBV program. Please see 24 CFR 983.53 for a complete list of ineligible properties.

H. Rent Limits

The gross rent (including utility allowance) may not exceed 110% of Fair Market Rent (FMR) for both initial rent and annual adjustments and must be rent reasonable in relation to rents charged in the private market for comparable unassisted units.

FY2020 Fair Market Rents (FMR) Effective October 1, 2019					
Efficiency	1 BR	2 BR	3 BR	4 BR	5 BR
\$646	\$689	\$879	\$1,175	\$1,543	\$1,744

I. Federal Requirements

Certain other Federal requirements also apply to PBV assistance, including, but not limited to:

1. Fair Housing. Nondiscrimination and equal opportunity. See 24 CFR 5.105(a) and section 504 of the Rehabilitation Act. Selected projects are subject to Fair Housing reviews which may include review of marketing and outreach plans and reasonable accommodation policies.
2. Environmental Review. See 24 CFR parts 50 and 58 and 24 CFR part 983.58.
3. Eligibility Restrictions. Prohibition on use of debarred, suspended, or ineligible contractors. See CFR 5.105(c) and 24 CFR, part 24.

In addition to the above, the following applies for new construction or rehabilitated housing:

4. Labor Standards. Regulations implementing the Davis-Bacon Act, Contract Work Hours and Safety Standards Act (40 U.S.C. 3701-3708), 29 CFR part 5, and other federal laws and regulations pertaining to labor standards applicable to an Agreement covering nine or more assisted units.

In addition to #1-4 above, the following applies for rehabilitated housing only:

5. Uniform Relocation Act. A displaced person must be provided relocation assistance at the levels described in and in accordance with the requirements of the Uniform

Relocation Assistance and Real Property Acquisition Policies Act of 1970 (URA) (42 U.S.C. 4201-4655) and implementing regulations at 49 CFR part 24.

IV. OFFER OF PROJECT BASED VOUCHERS

A. Number of PBV Units Available

The Housing Authority will make up to 25 units available for existing, rehabilitated or new construction projects that will serve income-eligible families.

B. Project Eligibility

In order to be considered under this RFP, all projects submitted must meet the conditions stated below:

1. Proposed project must be located in Monroe County.
2. Applicant may request to project-base no more than 25 units at a proposed project (there is no minimum requirement).
3. Proposed project must be an existing project, a planned new construction project or an existing project in need of major rehabilitation (see definitions in section III.D. of this RFP).
4. Construction or rehabilitation for the proposed project must *not* have started at time of selection for PBV (and cannot start until all post-award conditions are met and an Agreement is signed).
5. New construction or rehabilitation projects must provide a detailed plan for its construction and permanent financing which identifies the committed financing and anticipated remaining funding sources, including the status and commitment timeline for each source.
6. Proposed project must be located in a census tract with a poverty rate of no more than 20%. An exception to this requirement is possible if certain other conditions exist, i.e., there has been an overall decline in poverty rate over the past five years; the area is undergoing significant revitalization; new market rate units are being developed that would positively impact the poverty rate; and other conditions. Poverty rate, minority concentration and other characteristics of the neighborhood and census tract where the project is/will be located may apply. See 24 CFR Section 983.57 Site Selection Standards.
7. Applicant must have site control or evidence to indicate that the needed approval/documentation for site control is likely to be obtained and will not delay the project.
8. Applicant must provide evidence that the proposed new construction or rehabilitation is permitted by current zoning ordinances or regulations, or evidence to indicate that the needed rezoning is likely to be obtained and will not delay the project.

C. Other Considerations

1. Proposed projects that have or plan on-site or easily accessible supportive services for the target population will receive extra points in the competitive scoring process.
2. Applications submitted by an owner or developer experienced in the management or development of affordable housing will receive extra points in the competitive scoring process.
3. Applications proposing to project-base units with accessibility features for persons with mobility, hearing and sight impairments will receive extra points in the competitive scoring process. For a unit to be considered accessible, it must have:
 - a. An accessible building entrance on an accessible route
 - b. Accessible common and public use areas
 - c. Accessible doors (for a wheelchair)
 - d. Accessible route into and through the dwelling unit
 - e. Light switches, electrical outlets, thermostats and other environmental controls in accessible locations
 - f. Reinforced walls in bathrooms for installation of grab bars
 - g. Accessible kitchens and bathrooms
 - h. Wired for visible alarm and doorbell appliances

V. APPLICATION PROCESSING

A. Limit on Number of Projects

Applicants (“applicant” means a sponsoring housing development organization and all its affiliated entities) can submit a maximum of one (1) project for consideration under this RFP. Each application must be for a single project. A project is defined as a single building, multiple contiguous buildings, or multiple buildings on contiguous parcels of land.

B. Organization of Submitted Materials

All proposals (BHA application form and supporting documents) must be legibly typed and neatly organized and presented. All proposals must be bound by use of a binder or similar cover device. Applications submitted in loose-leaf style or held together by a paper clip or binder clip will **not** be accepted. To be awarded points for the selection criteria found in VI, supporting documentation for all criteria must be included, in order, within the proposal.

C. Submission Deadline

The applicant shall submit an original and two copies of its proposal to BHA by 4:00 p.m., **Monday, August 31st, 2020**. Proposals may be submitted by:

1. U.S. Mail to:
Daniel Harmon, HCV Program Manager
Bloomington Housing Authority
1007 N. Summit Street, Bloomington, IN 47404
2. Proposals addressed to Daniel Harmon may also be hand delivered to the Housing Authority main lobby during regular business hours.

The Housing Authority will date and time stamp all applications upon receipt. Proposals submitted after the deadline indicated above will not be accepted. Delays in mail service or other methods of delivery will not excuse late proposal delivery.

D. Proposal Review

The PBV Selection Panel appointed by BHA’s Executive Director will review, evaluate, rank, and select the applications according to the scoring criteria outlined in the RFP, BHA policy, and program regulations.

E. PBV Voucher Award

Proposals that meet the program requirements outlined in section IV.C. will be evaluated and ranked according to the rating and selection factors described below and in section VI. of this RFP. A ranking list will be prepared according to points awarded to each proposal. In order to be awarded project based vouchers, an application must score at least 70 points. Existing projects that are otherwise eligible and meet the minimum threshold requirement of 70 points will be given selection preference over new construction or rehabilitation projects.

The project application scoring the highest points will be conditionally awarded project-based vouchers up to the amount requested and in accordance with the specified limits. After awarding the highest scoring application(s), the Housing Authority will conditionally award the next highest ranking applications with project-based vouchers up to the amount requested and in accordance with the specified limits until all vouchers advertised as available for the program have been assigned. If the Housing Authority determines that an application is eligible for PBV funding but cannot be fully funded at the amount requested by the applicant, the owner will be given the opportunity to receive partial funding.

Before selecting projects, the Housing Authority will determine that each application is responsive to and in compliance with the Housing Authority's written selection criteria as stated in this RFP, and in conformity with HUD program regulation and requirements at 24 CFR part 983. The Authority may request additional documentation as needed to determine an applicant or project's eligibility or qualifications. BHA may, at its discretion, select none of the proposals submitted and reserves the right to postpone or cancel the final award of the proposals at its convenience.

F. Pre-Award Conditions

Prior to project selection, BHA must conduct:

1. **Unit Inspections.** If the units to be assisted already exist, BHA must inspect all the units prior to the proposal selection date according to HUD's Housing Quality Standards (HQS) guidelines and determine whether the units will be considered as existing housing or rehabilitated housing (see definitions in section III.D. of this RFP).
2. **Site and Neighborhood Review.** Before proposal selection, BHA will conduct an inspection of the proposed PBV site. Site selection standards include 1) An assessment of the physical attributes and appropriateness of the site for the proposed units; and 2) An assessment of whether the project is consistent with the goal of deconcentrating poverty and expanding housing and economic opportunities as stated in BHA's Administrative Plan. Owners/developers may be asked to submit additional information to help facilitate this site review.

G. Post Award Conditions

For the selected project(s), the following items must be completed before BHA and the owner can execute an Agreement (AHAP) or Housing Assistance Payments (HAP) contract.

1. **Environmental Review.** PBV activities are subject to HUD environmental regulations in 24 CFR parts 50 and 58. BHA must obtain documentation of environmental clearance from the Responsible Entity who conducted or approved the environmental review (see 983.58).
2. **Determination of initial contract rent.** BHA will determine the amount of initial rent to owner according to 24 CFR Section 983.303, paragraph (c).

3. Subsidy layering review. New construction PBV projects or existing PBV projects in need of rehabilitation that utilize tax credits or other governmental housing assistance from federal, state or local agencies are subject to a subsidy layering review (see 24 CFR 983.55) to prevent excessive public assistance for the project. Owners/developers will be required to submit a list of documents to BHA which will then be submitted to HUD for the review.

H. Incomplete and Non-Responsive/Non-Compliant Applications

If a supporting document required by this RFP is not under the control of the applicant and cannot be obtained by the proposal submission deadline, the applicant must include a written explanation in the application detailing the cause of the delay and the anticipated date the document will be delivered. The Housing Authority will review the information provided and accept the application, but classify it as non-responsive pending receipt of the document. In no case will documentation be accepted more than ten (10) days after the final deadline. If BHA finds that an application is found to be non-responsive or non-compliant with this RFP, written selection criteria and procedures, or HUD program regulations, it will be rejected and the applicant will receive written notification stating the reason for rejection. BHA reserves the right to reject applications at any time for misinformation, errors, or omissions of any kind, no matter how far they have been processed.

I. Withdrawal of Proposal

Applicants may withdraw their proposals before or after the RFP submission deadline by submitting a written request to Daniel Harmon by the address listed in section V.C. for proposal submission or by email at ddharmon@blha.net. Proposals can be re-submitted before the RFP submission deadline but cannot be re-submitted after the deadline.

J. Tied Proposals

In the case of a tie score between two or more applications and not enough units available to fully award each tied application, the available units will be evenly split and distributed.

K. Proposal Cost

All costs incurred in the preparation and presentation of the proposal shall be completely absorbed by the applicant. All documents submitted as part of the proposal will become property of BHA. Any material submitted that is confidential must be clearly marked as such.

L. Affirmative Action

BHA is an Equal Opportunity Business Enterprise which promotes competitive solicitations and does not discriminate on the basis of race, color, religion, creed, national origin, sex, disability, age, gender identity or sexual orientation. The Housing Authority encourages Minority, Small, Women-or Disabled-owned Business Enterprises to respond to this solicitation.

VI. Selection Criteria

The following selection criteria will be used by BHA to rank and select applications for this PBV Program. Each criterion is comprised of several components with associated point value. The total points awarded to an application will be the aggregate of the component subtotals for each factor. This section provides both a summary and details of the factors and point values.

SUMMARY OF FACTORS AND POINTS:

FACTOR	MAX POINTS
A. Site Location Adequacy (proximity of services)	20 points
B. Decentralization of Site Location	20 points
C. Provision of Supportive Services	20 points
D. Project Feasibility/Readiness <i>*(Existing Housing Only)</i>	20 points*
E. Project Feasibility/Readiness for Construction <i>*(New Construction or Rehabilitated Housing Only)</i>	20 points*
F. Previous Experience of Applicant in Development, and Management of Affordable Housing	20 points
G. Project Accessibility	20 points
H. Project Amenities	10 points
TOTAL MAXIMUM POINTS:	130 points (minimum points required for voucher award: 70)

A. SITE LOCATON WITH REGARD TO PROXIMITY OF SERVICES

<p>Project is within 5 miles of:</p> <ol style="list-style-type: none"> 1) A significant health facility 2) Transportation access 3) Retail shopping stores, including a grocery store and a pharmaceutical store 	<p>Project is within 5 miles of the <u>three</u> listed services:</p> <p align="center">20 points</p> <p>Project is within 5 miles of <u>two</u> of the listed services:</p> <p align="center">10 points</p> <p>Project is within <u>one or none</u> of the listed services:</p> <p align="center">0 points</p>
<p>MAXIMUM POINTS:</p>	<p align="center">20 points</p>

B. DECENTRALIZATION OF SITE LOCATION*

<p>Project is located within a census tract in which:</p> <ol style="list-style-type: none"> 1) The poverty rate is no more than 20% 2) The poverty rates of adjacent census tracts are no more than 20% 3) This is the first Section 8 project-based housing located in the census tract. <p><i>*Determinations shall be made by use of FFIEC Online Census Data System and U.S. Census FactFinder</i></p>	<p>Project meets <u>all three</u> of the listed factors:</p> <p align="center">20 points</p> <p>Project meets the <u>first</u> and <u>one other</u> of the listed factors:</p> <p align="center">10 points</p> <p>Project <u>does not</u> meet the first factor for decentralization:</p> <p align="center">0 points</p>
<p>MAXIMUM POINTS:</p>	<p align="center">20 points</p>

C. SUPPORTIVE SERVICES	
<p>Project provides appropriate supportive services on-site or easily accessible to site:</p> <ol style="list-style-type: none"> 1) Transportation, i.e. shuttle 2) Education 3) Child care 4) Job training and employment counseling 5) Substance/alcohol abuse treatment or counseling 6) Household or life skills training 7) Homeownership counseling 8) Self-sufficiency counseling 	<p>Project provides <u>at least four</u> of the listed services:</p> <p style="text-align: center;">20 points</p> <p>Project provides <u>at least three</u> of the listed services:</p> <p style="text-align: center;">10 points</p> <p>Project provides <u>two or fewer</u> of the listed services:</p> <p style="text-align: center;">0 points</p>
MAXIMUM POINTS:	20 points

D. PROJECT FEASIBILITY/READINESS (EXISTING HOUSING ONLY)	
<ol style="list-style-type: none"> 1) Project was constructed after 1978 and has neither lead paint nor asbestos removal issues 2) Project was constructed before 1978 but has neither lead paint nor asbestos removal issues 3) Project was constructed before 1978, lead paint or asbestos removal actions are planned 4) Project was constructed before 1978, lead paint or asbestos issues are unknown at this time 	<p>Project meets <u>the first listed</u> factor:</p> <p style="text-align: center;">20 points</p> <p>Project meets the <u>second listed</u> factor:</p> <p style="text-align: center;">10 points</p> <p>Project meets <u>either the third or fourth</u> listed factors:</p> <p style="text-align: center;">0 points</p>
MAXIMUM POINTS:	20 points

E. PROJECT FEASIBILITY/READINESS FOR CONSTRUCTION (*NEW CONSTRUCTION OR REHABILITATED HOUSING ONLY*)

New construction or rehabilitated housing has a significant percentage of finance sources committed and there is a detailed plan identifying the remaining funding, including an explanation of the status and commitment timelines for each source.

The Housing Authority will assign points by reviewing the construction and permanent financing committed at the time of application and specifics on the plan to secure remaining funding.

MAXIMUM POINTS:

20 points

F. PREVIOUS EXPERIENCE OF APPLICANT IN DEVELOPMENT AND MANAGEMENT OF AFFORDABLE HOUSING

Applicant has significant experience developing and/or managing (through a selected property management agent) low income units for:

- 1) Elderly persons; or
- 2) Persons with disabilities; or
- 3) Homeless persons or families; or
- 4) Low-income families; or
- 5) Special needs population as defined at IV.B.

The Housing Authority will assign points by reviewing the size of affordable housing portfolio, the applicant's amount and length of experience developing and managing affordable housing, and evidence of financial stability.

MAXIMUM POINTS:

20 points

G. PROJECT ACCESSIBILITY	
<p>Project will designate units with accessibility features for persons with mobility, hearing or sight impairments as PBV units (see section IV.D. of the RFP for a definition of accessible units)</p>	<p>All of the project's PBV units will be accessible for persons with mobility, hearing or sight disabilities:</p> <p style="text-align: center;">20 points</p> <p>50% or more of the project's PBV units (or at least 2 units, whichever is greater) will be accessible for persons with disabilities:</p> <p style="text-align: center;">10 points</p> <p>Less than 50% of the project's PBV units will be accessible:</p> <p style="text-align: center;">0 points</p>
MAXIMUM POINTS:	20 points

H. PROJECT AMENITIES	
<p>Project provides the following amenities to its residents:</p> <ol style="list-style-type: none"> 1) Off street parking 2) On site management 3) On site laundry facilities 4) Common room for resident use 5) Decks or patios attached to units 6) Project transportation to needed services 7) Resident wellness programs 8) Resident activities 9) Community garden for resident use <p style="padding-left: 40px;">Exercise room for resident use</p>	<p>Project provides all of the listed amenities:</p> <p style="text-align: center;">10 points</p> <p>Project provides at least three of the listed amenities:</p> <p style="text-align: center;">5 points</p> <p>Project provides less than three of the listed amenities:</p> <p style="text-align: center;">0 points</p>
MAXIMUM POINTS:	20 points



PROJECT BASED VOUCHER APPLICATION

I. Project Sponsor Information

- a. Sponsor Organization: _____
- b. Organization Address: _____
- c. City: _____ Zip Code: _____
- d. Federal Tax ID Number: _____
- e. Sponsor Organization Type (check only one):
 - i. Community Housing Development Organization:
 - ii. Nonprofit Housing Developer:
 - iii. Nonprofit Community Organization:
 - iv. For-profit housing developer:
 - v. Other (please specify): _____
- f. Executive Director: _____
- g. Telephone: _____
- h. Email: _____
- i. Project Contact: _____
- j. Telephone: _____
- k. Email: _____

II. Development Consultant (if applicable)

- a. Organization Name: _____
- b. Consultant Name: _____
- c. Telephone: _____
- d. Email: _____
- e. Will the Development Consultant serve as the primary project contact?
 Yes No

III. General Project Information:

- a. Project Name: _____
- b. Project Address: _____
- c. City: _____ State: _____ Zip Code: _____
- d. Parcel Identification Number (PIN): _____
- e. Census Tract: _____

- IV. Proposed Project Housing Activity Type:
- a. New Construction (*as defined in RFP*):
 - b. Existing Housing (*as defined in RFP*):
 - c. Rehabilitation (*as defined in RFP*):

V. Project Owner: _____

- a. Ownership Structure (check all that apply):
- i. Nonprofit
 - ii. Limited Liability Corporation (LLC)
 - iii. Limited Partnership
 - iv. Other Corporation
 - v. Other (please specify): _____
- b. For Existing Housing Only (check one):
- i. Property is privately owned:
 - ii. Property is publicly owned:
 - iii. Property is owned by the sponsor:
 - iv. Other (please specify): _____

VI. Developer Experience

- a. Please describe the applicant's experience in the development and management of rental properties, especially those which serve low income individuals and families. Please note the number of years of experience as well as the number of units developed and managed.

VII. Detailed Project Description:

Please provide a written narrative to thoroughly describe the proposed project. At a minimum this should address the following:

- a. Description of the type of housing to be provided, including number of units, number of bedrooms, building amenities to be provided.
- b. Need for the project.
- c. Characteristics of the population to be served including individuals, couples, families with children, age, gender, race, ethnicity, disabilities, income classifications, and other demographic descriptors as appropriate to the project.
- d. Support Services that will be required and provided.
- e. Public Transportation options.
- f. Location and characteristics of the site, including relevant zoning issues, neighborhood amenities and characteristics, distance to local amenities and services, health care, employment options and stores, etc.,
- g. Environmental concerns.

VIII. Unit Rental Summary (Numbers entered need to total down and across):

	Studio	1 bedroom	2 bedroom	3 bedroom	4 bedroom	Totals
# of requested PBV Units						
# of other subsidized units						
# of other rent controlled units						
Market Rate Units						
Total Units in Project						

IX. What is the length of Project Based Voucher contract you are seeking? _____ years

X. For New Construction or Rehabilitation Projects, describe the proposed design, layout, and other construction elements. Include, as appropriate, architectural drawings, floor plans, accessibility modifications, etc.

XI. For Existing Housing Projects:

a. What year was the building constructed? _____

b. Has a Lead Paint Inspection been completed? Yes No

c. Has lead based paint been found on the property? Yes No

d. Has asbestos been found on the property? Yes No

e. Is asbestos removal required? Yes No

f. If either lead paint or asbestos has been found on the property, describe the actions to be taken to remedy the situation.

XII. Project Timelines

Describe the project timelines. Identify relevant development activities that will move your project forward to full occupancy.

XIII. Obstacles

a. Does the site have current zoning that allows for your proposed use? Yes No

b. Describe any known issues or obstacles that may affect the projects' ability to meet the development objectives identified in the timeline described above.

XIV. Project Funding:

- a. Budget. All applicants must complete the accompanying Budget and Source and Use documents.
- b. Has the project received full funding at this time? Yes No
 - i. If no (check all that may apply)
 - Seeking Tax Credits Project decision date: _____
 - Seeking HOME Funds Project decision date: _____
 - Seeking CDBG Funds Project decision date: _____
 - Other Project decision date: _____
 - Other Project decision date: _____
 - Other Project decision date: _____

XV. Relocation Considerations

- a. Does the project involve the acquisition of existing multi-family housing?
 Yes No
- b. If yes, had the income from the existing tenants been verified for eligibility?
 Yes No
- c. Explain the income verification process and the strategy for addressing any current residents who are not eligible to remain in the building.
- d. Will the project involve residential tenant relocation?
 Permanent Temporary None
- e. Will the project involve commercial tenant relocation?
 Permanent Temporary None
- f. What requirements or guidelines govern your relocation plan? (Check all that apply)
 - i. Uniform Relocation Act Yes No
 - ii. Section 104[d] if HOME or CDBG funded Yes No
 - iii. Other: _____ Yes No
- g. Is there a government entity that has jurisdiction over tenant relocation issues for this project? Yes No If yes, who: _____
- h. Has the project developed a plan for the relocation? Yes No
- i. How many clients need to be relocated? _____ Residential _____ Commercial
- j. Have the relocation expenses been addressed in the budget for this development?
 Yes No Not Applicable



Bloomington Housing Authority

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BUDGET FORM

Proposed Project Schedule: As applicable, provide the schedule for completing the following actions.
 Enter the anticipated completion dates that are relevant for your project.

a. Project Start-up	Completion Date
Purchase Contract/Option Signed	
Property Acquisition Completed	
Zoning Approvals Obtained	
Detailed Program Design Completed	
Environmental Reviews Completed	
Building Permits Obtained	

b. Financing Sources Obtained	Completion Date
Construction Loan	
Bridge Loan	
Private Lender Financing	
Tax Credit Application Submitted	
Tax Credit Allocation Approval	
Gov't Grants/Loans:	
Other Financing:	
Other Financing:	

c. Construction/Implementation	Completion Date
Construction Starts	
Marketing of Units or Program Begins	
Occupancy/Rent-up Begins (rental projects)	
Full Occupancy (rental projects)	
Closing on First Sale (homebuyer projects)	
Closing on Final Sale (homebuyer projects)	
Complete Rehab Const. (for units currently occupied)	

Project Costs: Provide information, as applicable.

Acquisition	Total Cost
Land acquisition costs	
Land acquisition closing costs (title, recording, etc.)	
Building acquisition costs	
Building acquisition closing costs (title, recording, etc.)	
Other:	

Construction/rehab costs	Total Cost
Clearance/demolition	
Drainage Improvements	
Installation/renovation of sanitary sewers	
Installation/renovation of water mains	
Transportation improvements (on-site)	
Transportation improvements (off-site)	
Other Site Work	
Rehabilitation of existing units	
Renovation of non-residential structure into residential units	
New construction of residential units	
Equipment	
General requirements	
Builder's Overhead	
Builder's Profit	
Bonding Fee	
Builder's Risk Insurance	
Other:	
Other:	
Relocation	
Loss of Rental Income	
Contingency	

Development Costs

Real Estate Matters	Total Cost
Partnership formation	
Subdivision	
Conversion to Condominiums	
Other:	

Project Design	Total Cost
Architectural	
Architectural Supervision	
Cost Estimate	
Engineering	
Value Engineering	
Site Investigation	
Other:	

Project Planning	Total Cost
All Fees	
Permits	
Appraisal	
Environmental Study	
Market Study	
Survey	
Utility Fees	
Other	

Marketing/Leasing	Total Cost
Marketing	
Operating Reserve	
Other:	
Other:	
Other:	

Developer's Fee	
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Financing Costs

Tax Credits	Total Cost
Tax Credit Fee	
Tax Credit Counsel	
Cost Certification	
Other:	
Other:	

Tax Exempt Bond Financing	Total Cost
Bond Counsel	
Underwriter's Fee	
Reimbursables	
Other:	
Other:	

Conventional Loans	Total Cost
Construction Loan Origination Fees	
Construction Loan Legal Fees	
Permanent Loan Origination Fees	
Permanent Loan Legal Fees	
Loan Recordation Taxes/Fees	
Other:	
Other	

Other Loans	Total Cost
Legal Fees	
Loan Recordation Taxes/Fees	
Other:	
Other:	

Construction Period Interest	
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Tenant and Homebuyer Assistance	Total Cost
Tenant-based rental assistance	
Security deposit payments for renters	
Down payment assistance for homebuyers	
Mortgage financing for homebuyers	

Other	Total Cost

Total Cost and Total County Funding	Total Cost
TOTAL	

Sources of Funds: Provide information as applicable.

Permanent Financing (do not include construction financing)

Name of Lender or Source of Funds, Contact Persons and Telephone Number	Amount Funded	Annual Debt Service	Annual Interest Rate (pct)	Amortization Period (yrs)	Loan Term (yrs)
Owner's Equity (describe):		N/A	N/A	N/A	N/A
Tax Credit Proceeds		N/A	N/A	N/A	N/A
TOTAL					

Commitments for financing are in Attachment: _____ on Page: _____

Construction Financing

Sources of Funds	Amount	Name and Phone Number of Contact

Commitments for construction financing are in Attachment: _____ on Page: _____

Tax Credit Information

Tax credit basis amount:		Pct. Sold to Investors:	
Type of credit (4% or 9%):		Total tax credit equity:	
Tax credit syndicator (contact and phone number)			

Existing Building(s) Information: Applicable to acquisition and rehabilitation projects.

Information about the existing building(s).

Street Address	No. of Units	No. of Stories	Year Built	Appraised Value

Two color photos of the above-referenced buildings are in Attachment: _____ on Page: _____

Are any buildings occupied? Yes: _____ No: _____ If yes, explain any relocation plans below.

Annual Project Income: Provide the following information for rental projects only.

Projected Rent Schedule When Project is Fully Implemented

	No. of Units of This Type	No. of Bedrooms & Baths	Avg. Size (sq. ft.)	Monthly Rent Per Unit	Annual Rent for All Units
1.					
2.					
3.					
4.					
5.					
6.					
TOTAL		N/A	N/A		

Current Rent Schedule (complete for rental projects that are currently occupied)

	No. of Units of This Type	No. of Bedrooms & Baths	Avg. Size (sq. ft.)	Monthly Rent Per Unit	Annual Rent for All Units
1.					
2.					
3.					
4.					
5.					
6.					
TOTAL		N/A	N/A		

Utility Allowance Information (Tenant Paid Utilities)

Utility Cost	Tenant Pays		Type (gas, electric, etc.)
	Yes	No	
Heating			
Air Conditioning			
Cooking			
Lighting			
Water			
Sewer			
Trash Collection			
Hot Water Heating			

Stability of Operating Funding

INCOME

Source	Amount
a. Rental Income	
b. Parking	
c. Laundry Facilities	
d. Program Income	
e. Other Assistance	
f. Other (describe)	

TOTAL OPERATING INCOME	
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Sources of Additional Operating Income

g. Grant with Commitments in Hand	
h. Expected Grants	
i. Contributions	
j. Fee for Service	
Total	

Projected Total Income	
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Documentation for Additional Income Sources is provided as Attachment: _____ on Page: _____

EXPENSES

Annual Administrative Costs*

Item	Amount
Advertising	
Management	
Administrative	
Legal/Accounting	
Other:	
Total Administrative Cost	

*Do not include program costs, support services, etc.

Annual Operating Costs

Item	Amount
Gas & Other Fuel	
Electricity	
Water/Sewer	
Trash Removal	
Janitorial	
Exterminating	
Other:	
Total Operating Cost	

Annual Maintenance Costs

Item	Amount
Decorating	
Repairs	
Security	
Ground Maintenance	
Annual Replacement Reserve	
Other:	
Total Maintenance Cost	

Annual Taxes, Insurance, and Debt Service

Item	Amount
Real Estate Taxes	
Insurance	
Mortgage/Debt Service	
Total Taxes, Insurance & Debt Service	

a. Annual Program Expenses*

Item	Amount
Cost of Services to Residents	

*Include only the cost of services to this facility

TOTAL OPERATING COSTS:	
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	Amount
TOTAL ANNUAL OPERATING INCOME	\$
LESS TOTAL ANNUAL OPERATING COSTS	\$()
TOTAL*	\$

*If there is a deficit, explain how the program will be self-sustaining. See Attachment: _____ on Page: _____

Cash Flow Assumptions

Vacancy Rate	
Collection Loss	
Replacement Reserves (per unit)	

Growth Rate – Rent	
Growth Rate – Other Income	
Growth Rate – General Expenses	
Growth Rate – Real Estate Taxes	
Growth Rate – Payroll Taxes	
Growth Rate – Replacement Reserves	
Growth Rate – Other	