***Housing Development Financing Application Checklist***

*Please include this checklist as the Table of Contents for your Application Binder.*

Applicant:

Project:

Project Address:

|  |  | **FOR CITY USE ONLY** |
| --- | --- | --- |
| **ITEMS TO BE SUBMITTED****(in separately tabbed sections)** | Check if Enclosed | Date Rec’d | Complete | Not Complete |
| **SUMMARY INFORMATION** |  |  |  |  |
| 1. Cover Letter/Narrative Description
 |  |  |  |  |
| 1. Self-Scoring Worksheet

Electronic copy: 🞏 on flash drive, included |  |  |  |  |
| 1. City Application Form

Electronic copy: 🞏 on flash drive, included |  |  |  |  |
| **THRESHOLD INFORMATION** |  |  |  |  |
| 1. Community Outreach Plan and Activities
 |  |  |  |  |
| 1. Tenant Outreach Plan and Tenant Marketing Plan
 |  |  |  |  |
| 1. Evidence of Site Control
 |  |  |  |  |
| 1. Financial Plan
 |  |  |  |  |
| 1. Preliminary Title Report
 |  |  |  |  |
| 1. Appraisal
 |  |  |  |  |
| 1. Replacement Unit Analysis

Electronic copy: 🞏 on flash drive, included |  |  |  |  |
| 1. Relocation Plan and Budget (if applicable)
 |  |  |  |  |
| 1. Evidence of Meeting with Building/Code Enforcement
 |  |  |  |  |
| 1. Phase I Environmental Site Assessment
 |  |  |  |  |
| 13a. Phase II (if required) |  |  |  |  |
| 1. Lead Abatement and Asbestos Report
 |  |  |  |  |
| 1. Physical Needs Assessment and Cost Estimate
 |  |  |  |  |
| 1. Replacement Reserve Analysis
 |  |  |  |  |
| 1. CEQA Preliminary Checklist
 |  |  |  |  |
| 1. Rehabilitation Schedule
 |  |  |  |  |
| 1. Marketing Plan
 |  |  |  |  |
| 1. Management Plan (rental projects only)
 |  |  |  |  |
| 1. CHDO Recertification (if applicable)
 |  |  |  |  |
| 1. Certifications and Campaign Contribution Limit Acknowledgement
 |  |  |  |  |

|  |  | **FOR CITY USE ONLY** |
| --- | --- | --- |
| **ITEMS TO BE SUBMITTED****(in separately tabbed sections)** | Check if Enclosed | Date Rec’d | Complete | Not Complete |
| **PROJECT FEASIBILITY & SCORING CRITERIA** |  |  |  |  |
| 1. Scope of Work (paper copy)

Electronic copy: 🞏 on flash drive, included |  |  |  |  |
| 1. Rehabilitation Budget (paper copy)

Electronic copy: 🞏 on flash drive, included  |  |  |  |  |
| 1. Operating Budget (paper copy -- Rental projects only)

Electronic copy: 🞏 on flash drive, included |  |  |  |  |
| 1. 30 Year Proforma (paper copy -- Rental projects only)

Electronic copy: 🞏 flash drive, included |  |  |  |  |
| 1. Financial Summary (paper copy)

Electronic copy: 🞏 flash drive, included |  |  |  |  |
| 1. Unit Size and Affordability (paper copy)

Electronic copy: 🞏 on flash drive, included  |  |  |  |  |
| 1. Displacement Prevention Worksheet

Electronic copy: 🞏 on flash drive, included |  |  |  |  |
| 1. Maximum Affordable Sales Price Calculation (Ownership projects only)

Electronic copy: 🞏 on flash drive, included |  |  |  |  |
| 1. Construction Financing
 |  |  |  |  |
| 1. Permanent Financing
 |  |  |  |  |
| 1. Acquisition and Predevelopment Financing
 |  |  |  |  |
| 1. Rental or Operating Subsidies (if applicable)
 |  |  |  |  |
| 1. Neighborhood Narrative and Revitalization Description
 |  |  |  |  |
| 1. Location Map
 |  |  |  |  |
| 1. Developer Experience Worksheets
 |  |  |  |  |
| 1. Joint Venture Agreement (if applicable)
 |  |  |  |  |
| 1. Developer Capacity Worksheet
 |  |  |  |  |
| 1. Resumes of Developer’s Key Staff
 |  |  |  |  |
| 1. Resumes and Experience of Development Team
 |  |  |  |  |
| 1. Audited Financial Statements and Financial Analysis Workbook

Electronic copy: 🞏 on flash drive, included |  |  |  |  |
| 1. Preservation Statement
 |  |  |  |  |
| 1. Preliminary Resident Services and Technology Plan
 |  |  |  |  |