



**City of Plano
2011 Consolidated Grant Process
Permanent Housing Application Cover Sheet**

SECTION I

Organization Name: _____

Address: _____

City: _____ State: _____ ZIP: _____ Phone: _____ Fax: _____

Director's Name/Title: _____ Director's Contact Information: _____

Name: _____ Phone: _____

Title: _____ Email: _____

SECTION II

Name of Program/Project: _____

Location of Program/Project: _____

Total Grant Amount Requested: _____

Organization Tax I.D. #: _____ DUNS #: _____

Contact Person Concerning Grant Application: _____

Contact Person's: Phone: _____ Email: _____

SECTION III

Authorized Official's Name/Signature/Date:

Printed Name: _____

Signature: _____ Date: _____

SECTION IV

Did a representative of your organization attend one of the 2010 City of Plano training sessions for consolidated grant applications:

Yes, on date:

No

SECTION V (CITY STAFF ONLY)

Received by: _____

Date/Time: _____

SECTION VI

Application Checklist - Check the following boxes to indicate each item is included in the application packet.

	One original paper copy of grant application with signed coversheet and all attachments
	One CD-ROM, flash drive or similar device with copies of all documents, including application and all attachments, in PDF format.
	Attachment 1: Detailed annual organization budget for the current fiscal year
	Attachment 2: List of organization's officers/board members including the city in which they live, their professional affiliations, and their ethnicity.
	Attachment 3: Annual meeting schedule for organization's officers/board members
	Attachment 4: Resumes of Organization and Program Directors
	Attachment 5: Copy of the organization's latest tax return accepted by IRS
	Attachment 6: Copy of the organization's IRS letter of determination
	Attachment 7: Copy of the organization's most recent audit of financial records
	Attachment 8: Copy of the organization's most recent audit recommendations letter/management letter submitted to the board of directors OR
	The organization does not have a management letter or the like but has included a letter stating such and completed the appropriate information in the audit certification form.
	Attachment 9: Audit information certification form

Commissioner's Notes:

**2011 City of Plano Consolidated Grant Process
Permanent Housing Application**

Definition of Grant Type - The Permanent Housing Application focuses on funding the construction or rehabilitation of affordable housing for low-to-moderate income Plano residents. This application can include requests for funding of construction cost and/or land acquisition for new housing and repairs/rehabilitation of existing housing. Portions of the request also may include payroll expenses and/or other administrative expenses relating directly to the program for which funding is required.

Section 1. Organization Overview

A. State your organization's mission or purpose.

B. Provide a general description of the clientele your organization serves.

C. Provide the date of the first Board of Director's meeting of the agency's local organization and the date the organization received tax exempt status from the Internal Revenue Service.

Commissioner's Notes:

Section 2. Program Overview

A. Describe in detail the housing program for which your organization is requesting funds, including all activities proposed (acquisition, rehabilitation, reconstruction, demolition, site preparation, financial assistance, new construction, and/or resale) and type of property (number of units, number of lots, owner occupied, tenant occupied or unoccupied).

B. State the number of households served by the program for which your organization is requesting funds:

Program Year	Total Households	Plano Households
Actual served in Grant Year 2009		
Projected served in current Grant Year 2010		
Projected served in Grant Year 2011 if fully funded		

C. Provide the estimated amount of dollars per household as noted below.

Estimated cost of project per household	
Estimated City of Plano funds used per household	
Estimated direct homebuyer subsidy	

D. Describe the financing for the housing program on a per unit basis for homebuyer programs:

1. Will the organization be financing the acquisition of property? Explain your procedure for doing this.

Commissioner's Notes:

2. Will the homebuyer obtain permanent financing for the housing? If so, describe the details of the financing, including information such as: Who provides the financing? Do you use preferred lenders? What, if any, restrictions are there on the loan product? Is there a minimum or maximum amount financed?

E. Will you be procuring general contractors for the rehabilitation or building of these projects?

1. If so, do you have a process for approving the contractor? Describe your procurement process.

2. If not, will you be procuring contractors for specific work exceeding \$2,000? Describe your procurement process.

F. List the documentation your organization maintains to verify income status of clientele and when this documentation is obtained.

G. Do you require homebuyer or homeownership education of your clientele, and if so, what is it?

Commissioner's Notes:

Section 3. Program Specific Financial Information

This section requires financial information relating to the specific program for which funding is requested rather than financial information for the entire organization.

A. Provide a projected **Program Budget Summary** for the funds you are requesting.

This chart summarizes the program budget that you have attached as a separate document

Permanent Housing Revenues	Amount	Permanent Housing Expenses	Amount
Clientele Fees		<i>Affordable Housing Expenses</i>	
Grants		Property Acquisition	
Donations		Construction /Materials	
Fundraisers		Other Expenses	
Net Proceeds			
Other Revenues		<i>Operating Expenses</i>	
<i>Total before City Funding</i>		Personnel	
City Funding		Operation/Occupancy	
		Miscellaneous	
<i>Total Revenues for Program</i>		<i>Total Expenses for Program</i>	

B. Below list each of the “grants”, and the amounts requested/received, identified in the “Permanent Housing Revenues” section of the Program Budget Summary above. Updates are required during public hearings.

Funding Source	Amount Requested	Date Grant Submitted	Current Grant Status (pending/received/denied)		

C. List all resources included in “other revenues” and all expenditures by line item included in “other expenses” in the Program Budget Summary above.

Other Revenues:

Other Expenses:

Commissioner’s Notes:

Section 4. Organization Stewardship

This section requires financial information relating to the entire organization, including but not limited to the specific program for which funding is requested.

A. What is your organization’s fiscal year?

B. Organization Budget Summary (must reflect your most current, adopted budget projection and the two previous fiscal years)

Organization Revenues	Two Years Prior (Actual)	Previous Fiscal Year	Current Fiscal Year
Clientele Contributions			
City of Plano CDBG/HOME Grants			
Other Federal Grant			
All Other Grants			
Donations			
Fundraisers			
Miscellaneous Revenue			
<i>Revenue Total</i>			
Organization Expenses	Two Years Prior (Actual)	Previous Fiscal Year	Current Fiscal Year
Personnel			
Operational			
Occupancy			
Other Expenses			
<i>Expense Total</i>			

C. List specific items and amounts included in miscellaneous revenue and other expenses categories:

D. What fiscal year is represented with the organization’s audit included as an attachment with this grant application? If your audit is more than 12 months old, please describe why a more recent audit is not available.

Commissioner’s Notes:

Section 5. Grant Funding Requirements

- A.** List which 2010-14 City of Plano Consolidated Plan goal(s) your organization's grant request will address and describe how:
- B.** Indicate which one of the following outcomes your organization's grant will produce:
- Availability/Accessibility - Activities that make services, infrastructure, housing, and shelter available and accessible. Note that accessibility does not refer only to physical barriers.
 - Affordability - Activities that provide affordability in a variety of ways. This can include the creation or maintenance of affordable housing, basic infrastructure hookups, or services such as transportation or day care.
 - Sustainability - Activities that promote livable or viable communities and neighborhoods by providing services or by removing slums or blighted areas.
- C.** If your organization is requesting \$200,000 or more for construction, please describe how it intends to meet Section 3 federal requirements. Even if you are not requesting \$200,000, how does your organization encourage employment opportunities to low-income persons or business owners employing low income persons?
- D.** If your organization is requesting funding for 12 or more units (rehabilitation or new construction) describe how it intends to meet Davis Bacon federal requirements.
- E.** Please describe your procedural documents below including title, description, number of pages, date of adoption, and frequency of update.

Commissioner's Notes:

F. Describe how you track your Net Proceeds and on what type of expenses you plan to use these funds.

Section 6. Supporting Information

A. Describe the outreach and recipient selection processes and accessibility of your organization to target Plano clientele.

B. Describe how your organization utilizes volunteers for this program.

C. Describe how your organization utilizes its board of directors to enhance the impact of this program.

D. Describe your efforts and successes in securing materials, donated labor, and/or donated equipment to optimize funds provided.

Commissioner's Notes:

Commission Summary (Completed Only by Commissioners)

Agency: _____ Amount Requested: _____

Sections 1. & 2. Program Overview

How does the program of this organization compare to programs of other organizations submitting this type of application?

Section 3. Program Specific Financial Information

How strong of an understanding of optimizing requested funds is demonstrated by this organization?

Section 3. Organization Stewardship

How strong of a fiscal responsibility does this organization demonstrate in securing revenues from diverse sources?

What level of fiscal responsibility and management is demonstrated by this organization in distribution of funds to best serve their clientele?

Section 4. Grant Funding Requirements

Based on the HUD guidelines required for CDBG/HOME recipients undertaking construction/rehabilitation projects, does the organization demonstrate an overall understanding relating to this federal funding?

Section 5. Supporting Information

How does this organization demonstrate a strong network of best serving potential clientele through agency accessibility, utilizing volunteers, partnering with other agencies, and securing donations of materials and labor?

Commissioner's Overall Impression

Taking into consideration the organization's overall presentation of written and oral information, does it deserve more than, equal to, or less than the average amount of all grants from the available sources?