City of Santa Fe

Agenda

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COMMUNITY DEVELOPMENT COMMISSION MEETING

Wednesday, February 15, 2017
8:45-4:00 p.m.
500 Market Street, Suite 200

Roundhouse Conference Room

1. Call to Order
2. Roll Call
3. Approval of Agenda
4. Affordable Housing Trust Fund (AHTF) and Community Development Block Grant (CDBG) 2017 Funding Proposals (Margaret Ambrosino)
   a. Applicant Presentations: 9:00 am
   b. Adjourn for Lunch: 11:45
   c. Call to Order: 1:15 pm
5. Commission Discussion with staff analysis for 2017-2018 Program Year and Commission's funding allocation recommendations (Margaret Ambrosino).
6. Approval of Minutes: November 16, 2016 CDC
7. Items from the Commission
8. Items from the Floor
9. Adjournment

An interpreter for the hearing impaired is available through the City Clerk's office upon five days notice. Please contact 955-6521 for scheduling.

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CITY OF SANTA FE

COMMUNITY DEVELOPMENT COMMISSION

MEETING
February 15, 2017

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CALL TO ORDER		
ROLL CALL	Quorum	1
APPROVAL OF AGENDA	Approved	1
AFFORDABLE HOUSING TRUST FUND (AHTF) AND COMMUNITY DEVELOPMENT BLOCK GRANT (CDBG) 2017 FUNDING PROPOSALS (Margaret Ambrosino) a. Applicant Presentations: 9:00 a.m. b. Adjourn for Lunch: 11:45 a.m. c. Call to Order: 1:15 p.m.	Motion passed	2-34
COMMISSION DISCUSSION WITH STAFF ANALYSIS FOR 2017-2018 PROGRAM YEAR AND COMMISSION'S FUNDING ALLOCATION RECOMMENDATIONS (Margaret Ambrosino)		34-35
APPROVAL OF MINUTES: November 16, 2016 CDC	Approved	35
ITEMS FROM THE COMMISSION	None	35
ITEMS FROM THE FLOOR	None	35
ADJOURNMENT	Adjourned at 4:00 p.m.	36

MINUTES OF THE

CITY OF SANTA FE

COMMUNITY DEVELOPMENT COMMISSION MEETING
Santa Fe, New Mexico

February 15, 2017

A meeting of the City of Santa Fe Community Development Commission was called to order by Councilor Renee Villarreal, Chair on this date at 8:45 a.m. in the Market Station Offices, 500 Market Street, Suite 200, Roundhouse Conference Room, Santa Fe, New Mexico.

The presentations of the CDBG proposals were made beginning at 9:00 a.m. with deliberations of the Committee commencing at 2:45 p.m.

Members Present:
Councilor Renee Villarreal, Chair
Ken Hughes
Carla Lopez
John Padilla
Silas Peterson

Member(s) Absent:
Rusty Tambascio, Vice Chair
Paul Goblet, excused

Staff Present:
Margaret Ambrosino, Senior Housing Planner
Alexandra Ladd, Special Projects Manager, Housing and Community Development Department
Chris Sanchez, Youth and Family Services Division Director
Julie Sanchez, Youth and Family Services Division Program Manager

Others Present:
Zack Thomas, Santa Fe Community Housing Trust
Denise Benavidez, Santa Fe Community Housing Trust
Ted Swisher, Santa Fe Habitat for Humanity
Fritz Denny, Santa Fe Habitat for Humanity
Mike Loftin, Homewise
Kate Preteska, Homewise
Laura Altomare, Homewise
Rebecca Mnuk, New Mexico Legal Aid

Tony McCarty, Kitchen Angels
Gaile Herling, Adelante
Denise Verineulen, Esperanza Shelter
Jorge Fonseca, Esperanza Shelter
Lisa S. Vakharia, Interfaith Shelter
Joseph Jordan-Berenis, Interfaith Shelter
Daniel Block, Youth Shelters
Dan Bailey, Youth Shelters
Michael Bartlett, St. Elizabeth's Shelter
Jim Podesta, St. Elizabeth's Shelter
Deborah Tang, St. Elizabeth's Shelter
Sean Spieyelman, YouthWorks!
Joseph Salazar-Lopez, YouthWorks!
Melynn Schuyler, YouthWorks!
Tamara Zaurstowski, YouthWorks!
Lee Lesne, YouthWorks!
Sylvia Barela, Santa Fe Recovery Center
Jo Ann G. Valdez, Stenographer

APPROVAL OF AGENDA

Commissioner Padilla moved to approve the Agenda. Commissioner Hughes seconded the motion. The motion passed unanimously by voice vote.

AFFORDABLE HOUSING TRUST FUND (AHTF) AND COMMUNITY DEVELOPMENT BLOCK GRANT (CDBG) 2017 FUNDING PROPOSALS (*Margaret Ambrosino*)

a. **Applicant Presentations: 9:00 a.m.**
b. **Adjourn for Lunch: 11:45 a.m.**
c. **Call to Order: 1:15 p.m.**

[Note: All items for the proposals/presentations are incorporated herewith by reference as Exhibit "A". The original packet is on file at the City Clerk's Office.]

THE HOUSING TRUST-Down Payment Assistance (CDBG)

Zach Thomas and Denise Benavidez presented the information regarding the request for funding, from the Application, which was distributed in the members' packets.

The Housing Trust is requesting $200,000 in CDBG funding to provide down payment and closing cost assistance to low and moderate income level home purchasers. The Grant will fund down payment loans for home purchases for buyers earning under 80% area median income that are secured by a second mortgage. These non-amortizing loans are zero-interest, due on sale, transfer or refinance. Recipients must first complete an 8-hour class, develop a budget, a plan, and secure credit rating during one-on-one

counseling. Loans are sized to assure financial sustainability with added consideration of income level, veteran status, and special needs. All loans are underwritten internally and presented for approval by a Loan Committee, made up of community members, private bankers, and experienced senior staff. CDBG down payment assistance remains the only form of assistance to help low and moderate-income home buyers to purchase existing homes in the open market.

Mr. Thomas said he is one of the Program Managers at the Santa Fe Community Housing Trust. He oversees the development and asset management program. He introduced Denise Benavidez noting that she oversees the homebuyer program.

Mr. Thomas said the average median income of the clients assisted in 2015-2016 was 67% AMI, or an average of $34,933.

He noted that they invoiced $71,000 in the period 7/1/2016 to the present serving five clients and 15 household members with these funds and expect to expend the remainder before 6/30/2017.

He provided a brief background of the Housing Trust noting that they have administered the CDBG Down Payment Assistance Revolving Fund for more than 23 years, as well as other numerous federal and state grant programs and multi-million dollar construction projects. The Housing Trust administers the following federal grants: HUD Housing Counseling Grant, Shelter+Care, the Low-Income Housing Tax Credit program, Housing Opportunities for People with Aids, Community Housing Development Organization funds and previous CDBG funds for both housing development and homebuyer assistance.

Mr. Thomas handed over the floor to Denise Benavidez who talked about the Homebuyer Program.

Ms. Benavidez said one of the things she would like to talk about is that currently they have three counselors and she is in the process of hiring another counselor. Interviews will be conducted this week.

She said they have started to do quite a bit of outreach recently. She noted that the banks have to adhere to a federal requirement to have more moderate-to-low income loans on their books and the Housing Trust is working on some different things with them. Because of this, they have increased the number of clients that are going to the Housing Trust. They currently have 7 clients that are in the works and 14 in the pipeline.

She said with that being said, the additional CDBG funding would be used to assist those clients and they also expect that to grow. This is one of the reasons they are hiring more counselors.

Chair Villarreal asked if there were any questions from the Commission.

Commissioner Hughes asked what the banks have to adhere to.

Ms. Benavidez explained that the banking industry has to have a certain number of moderate-to-low income loans on their books to meet a criteria that regulators require in that industry. This is why the Housing Trust is working with them and getting more phone calls for mortgages based on the qualifications for criteria.

Ms. Benavidez said several of the banks are interested in seeing what homes are out there that are deemed to be an affordable type home, and the Housing Trust recently took some of them on a tour of affordable homes in Santa Fe, so that they can pass this information onto their clients.

She said they also recently met with a gentleman from Workforce Solutions who runs a veterans-type program. They also reached out to the Housing Trust to see how they could work together to get the homeless veterans into a home; or into counseling to counsel them in order for them to be able to purchase a home.

Commissioner Hughes asked if there was a way for the banks to contribute to the Housing Trust fund.

Ms. Benavidez said yes, there is and they are currently discussing that with them.

Commissioner Padilla said, he in reference to the banks reaching out, is there a percentage that they are looking to have on their books, or a quota that they are trying to meet.

Ms. Benavidez said she does not think that there is a quota they have to meet or a percentage, at this point, but they do have to have a diverse portfolio and within that portfolio, they do like to show a number of loans within a certain demographic area.

Commissioner Padilla asked Ms. Benavidez what projects they showed the bankers on the tour.

Ms. Benavidez said they took them around the city in a couple of new developments and one of them was the Housing Trust's development. There is a new development off of Rufina and the developer was approved for nine affordable homes. They presently have three of them up so they toured these three models. They also took them to the "Twilight" models.

Commissioner Padilla asked what the affordable price ranges were.

Ms. Benavidez said the affordable prices ranged from $177,000 to $319,000.

Commissioner Lopez said she had a question about the application itself. She

referred to page 29 of the application, Item E (*Performance Measurements*) noting that it says to refer to Exhibit "B" but she does not have Exhibit "B".

Ms. Ambrosino said it may be with the original application because she does not see it with the copies.

Commissioner Peterson said the Commission has a note that was provided by staff about what happens to the down payment assistance when the property is sold. He asked what happens to the appreciation of the home, does the homeowners get to recoup the appreciation; and what happens to the proceeds of the sale.

Mr. Thomas said yes, the second mortgage monies are recycled into the Fund and lent to other buyers, and if there is appreciation, they can recoup that. He noted that there are some examples of this in the next application but all repaid funds are recycled by the Housing Trust for new down payment loans.

Chair Villarreal said the Housing Trust application said they are anticipating serving 14 households but the budget says 10 households.

Mr. Thomas said this is a range of households they anticipate serving because it is based on how much they need and this will be different for every potential buyer. The range could be from 10-14 households.

Ms. Ambrosino said if funded, the contract will have a minimum number of clients that will need to be served, based on the amount of CDBG funding that was granted.

THE HOUSING TRUST -Down Payment Assistance (AHTF) 2 requests

Zach Thomas and Denise Benavidez presented the information regarding the request for funding, from the Application, which was distributed in the members' packets.

The Housing Trust is requesting $75,000 in AHTF funding for the Arroyo Central Workforce Down Payment Assistance. This will enable the purchase of five homes by households earning from 80% to 120% of AMI in the Arroyo Central subdivision in Tierra Contenta. The down payment assistance funds would help at least five working households to get the foothold that will help to anchor them in Santa Fe while maintaining predictable and sustainable monthly housing costs. They anticipate an average loan of $15,000 at the Arroyo Central subdivision in Tierra Contenta.

THE HOUSING TRUST -Down Payment Assistance (AHTF)

Zach Thomas and Denise Benavidez presented the information regarding the request for funding, from the Application, which was distributed in the members' packets.

The Housing Trust is requesting $150,000 in AHTF funding for Down Payment Assistance for Moderate Income Workforce. This funding would provide down payment assistance for 8-10 households to get the foothold that will help to "anchor them in Santa Fe while maintaining predictable and sustainable monthly housing costs." First time

homebuyers are challenged to accumulate sufficient funds for down payment and closing costs typically required to purchase a home in Santa Fe. The down payment assistance loans would supplement the home purchasers' own funds and other sources needed for the down payment on a modest home. AHTF funds are used for zero interest, non-amortizing, thirty-year loans that are repaid at sale or refinance and are capped at $20,000 per transaction allocated in the minimum amount necessary to secure prime first mortgage loans.

Mr. Thomas noted that all of their transactions/loan are underwritten and reviewed by an outside Loan Committee that consists of volunteer mortgage lending professionals.

He said the Housing Trust supplements the subsidies with its MI$aver Program. Purchasers can borrow up to 20% of the purchase price in the form of an amortizing, interest bearing second mortgage with an interest rate at or below that on the first mortgage. The Housing Trust was granted $1,000,000 for that purpose (of which 25% is remaining). In 2016, the Housing Trust provided $451,000 under the MI$aver Program in the form of second mortgages. The second mortgages do not reduce the loan amounts by much, but rather eliminates the cost of Mortgage Insurance and premiums which afford substantial savings. When reservations exceeded the funds available in 2016, the Board of Directors allocated an additional $500,000 from other sources to cover the needs anticipated in 2017. All of these funds are in hand.

Chair Villarreal asked if there were any questions from the Commission.

Commissioner Lopez said with regards to the leveraging/matching requirement on the two applications, she said there are different statements but the same yields on the applications.

Mr. Thomas said it is simply a typo and he saw it after they submitted the applications. He believes the number for leveraging is 18: 1(not 93:1 or 16:1 as indicated in the two applications). He said this varies and they are using a best average based on each buyer's situation and it never goes below 15.

Chair Villarreal asked if there were any more questions of the Commission and there were none.

HABITAT FOR HUMANITY -Single Family Home Improvements (CDBG)
**(Commissioner Peterson recused himself from discussion and voting on this funding request, having declared a conflict of interest.)*

Ted Swisher and Fritz Denny presented the information regarding the request for funding, from the Application, which was distributed in the members' packets.

Habitat for Humanity is requesting $60,000 in CDBG funding to provide emergency and critical home repairs to low income citizens who are at or below 60% AMI. Only emergency or critical home repairs will be undertaken. While not limited to seniors,

the vast majority of their clients are over the age of 65 and are on a fixed income. They serve veterans and people with disabilities and have installed wheelchair ramps to residents confined to a wheelchair who had no reasonable access to their homes. The CDBG funding will be used to pay contractors for labor and materials for a minimum of 10 projects. They advertise in the *New Mexican* and the *Thrifty Nickel* in English and Spanish.

Mr. Swisher highlighted a couple of aspects on the services they provide saying that he wants to emphasize collaboration because they collaborate with other organizations to do this. He said he does not know of anybody else who is doing this type of thing in Santa Fe.

Mr. Swisher said Habitat for Humanity is known for building new homes but they starting receiving phone calls for these kinds of repairs when Open Hands went out of business.

Mr. Swisher said in terms of collaboration, they collaborate with Central New Mexico Housing which receives funding from the state to conduct energy efficiency repairs and improvements. They also work with other funding sources and has successfully administered several government contracts including HOME and the Affordable Housing Tax Credit program through MFA (SHOP), a HUD program that provides funding for land and infrastructure and the Federal Home Loan Bank's down payment assistance program (for elderly and handicap).

Mr. Swisher said sometimes they will provide the material for work that has to be done and the homeowner will have a relative or friend do the home repairs. He noted that the work they do is paid for with a grant so homeowners do not have to pay it back.

Mr. Swisher said the final thing he would like to highlight is the partnership with Fritz Denny and Willy Marquez whose salaries are paid out of Habitat's budget.

Mr. Denny said he has been in Santa Fe for 45 years and a carpenter most of his life. He said it is nice to be helping these folks who are neighbors and friends with this service. Some of these roofs would deteriorate without their help and without their services, this people would not be able to stay in their homes and therefore, they really appreciate these services. He thinks this is a wonderful project and he hopes that they will fund it.

Mr. Swisher said they are thankful for the partnership with the City and this is the fourth year that they have submitted an application for CDBG funding for home improvements. He said in 2015-2016, they received $50,000 in CDBG funding and they completed 17 projects with that, at an average of $2400 per project. He said they get a lot of bang for the buck.

Chair Villarreal asked if there were any questions of the Commission.

Commissioner Lopez asked what kind of project can they do with $2400.

Mr. Swisher said they have done minor roof, window repairs and a wheelchair ramp would be in that range.

Mr. Denny said they take out a lot of bathtubs and turn them into a walking shower.

Chair Villarreal asked how they determine who receives their assistance.

Mr. Swisher said it is on a first come-first served basis on who applies.

Chair Villarreal asked him if they have criteria that a client has to meet.

Mr. Swisher said it is based on income and need. This is basically the criteria they have.

Commissioner Lopez asked if they do any kind of outreach, or do people go to them.

Mr. Swisher said most people come to them but they do some advertising in the local newspapers in the classified sections in the *New Mexican* and the *Thrifty Nickel*.

Chair Villarreal asked if they have noticed from the outreach who they get more clients from the *New Mexican or* the *Thrifty Nickel*.

Mr. Swisher said from the Thrifty Nickel.

Chair Villarreal asked if they have thought about focusing on other advertisements.

Mr. Swisher said no, they have not but they are open to it.

Commissioner Lopez asked if they have a waiting list.

Mr. Swisher said no.

Commissioner Padilla had a question for staff. He asked if they know of anyone else in the City that is doing this type of work.

Ms. Ambrosino said Homewise does loans for home improvements for clients below 80% AMI but the structure is different. They loan funds and this is a grant.

Commissioner Padilla said with regards to outreach, Habitat may consider the fact that millennials do not read the paper.

Commissioner Padilla commended Habitat for the work they have done, the work they are doing and the work that they will continue to do.

Mr. Denny said this service takes care of a lot of native Santa Feans and keeps them in their homes.

HOMEWISE-Home Improvement (CDBG)

Mike Loftin, Laura Altomare and Kate Preteska presented the information regarding the request for funding, from the Application, which was distributed in the members' packets.

Homewise is requesting $100,000 in CDBG funding to assist homeowners below 80% AMI in the City of Santa Fe to maintain their asset through home improvement services. These services include loans needed for repairs related to the health and safety of the homeowner, emergency repairs and handicap modifications and in recent years, a focus on energy and water saving improvements and repairs to address the rising cost of energy and the conservation of water in our community.

Ms. Altomare said one of the ways they promote this program is that they do a lot of outreach with local contractors to make them aware of the financing available for their clients. Contractors often refer these clients to Homewise, especially if the client expresses difficulty in paying for a quoted repair.

She said most of the clients that are coming to Homewise for these types of loans are not in a financial position to obtain a home equity loan or a line of credit loan from a bank. They typically require a significant amount of equity in the home to qualify for that kind of loan and they often have high monthly payments. It is their experience that low-income households typically cannot afford any additional monthly payments for a home improvement loan, and thus, their loan must be entirely deferred; or they will have to turn to high-interest credit cards or vehicles to do the repair projects and this is not a sustainable option in the long run. Without CDBG funding, Homewise will not be able to assist low and extremely low households in making critical home improvements.

Ms. Altomare said it is anticipated that $100,000 in CDBG funding will provide assistance for ten to fifteen (10-15) households. She said Homewise has a long history of effectively using CDBG home improvement loan funds, as well as other sources to help low income Santa Feans with their homes.

Ms. Altomare mentioned that Homewise has received CDBG loan funds since July 1, 2010 through December 2016 and have had the following impacts:

- 106 home improvements have been done
- 60% of the borrowers are Hispanic
- Average age of the borrower is 67 years old
- Average income of the borrowers is $21,722, below the 80% AMI target

Chair Villarreal asked if there were any questions of the Commission.

Commissioner Peterson said he saw a note that indicated that the program income is at a record low. He asked if Homewise currently has 106 loans outstanding or have some of those been paid back in full and then re-loaned.

Ms. Altomare said they do not have 106 active loans on the books now because as the loans get paid off, the funds are recycled back into the program and lent out to new borrowers. She said the lending terms on some of these loans can go up to 30 years and they have some loans that are paid off more quickly (i.e. 10 or 20 year loans).

Chair Villarreal asked if she could provide a percentage on how many of the loans are paid off or some kind of a breakdown on the pay off period.

Ms. Altomare said she did not have that information.

Mr. Loftin said one thing that complicates this is that some of the loans are zero percent loans for people with very low incomes who cannot afford a payment and these are deferred loans. He said you are not seeing that money until the house is paid off or a homeowner passes away, so it is hard to predict when that happens.

Ms. Preteska said these funds are used to ensure that a home is safe and healthy for a person to live in and they will not do anything that is not an absolute necessity.

Chair Villarreal asked if they ever get any clients who need removal of toxic materials.

Ms. Preteska said for any type of infrastructure modification, they will do a lead-base test, and in her 4 years, she has not seen a lead-base test come back positive.

Commissioner Lopez asked how people find them and do they have a waiting list and are they seeing a need for these services.

Ms. Altomare said they do not have a waiting list. She said a lot of people will find them through the contractor outreach that she was talking about. She said at Homewise, in general, they have a robust marketing and communications activities planned.

Mr. Loftin said there is definitely a need for these services.

Commissioner Lopez asked if they have spent all the CDBG funding they have received.

Mr. Loftin said yes.

HOMEWISE-Down Payment Assistance (CDBG)

Mike Loftin, Laura Altomare and Kate Preteska presented the information regarding the request for funding, from the Application, which was distributed in the members' packets.

Homewise is requesting $200,000 in CDBG funding to assist families and

individuals whose incomes are under 80% AMI with down payment assistance for their home purchase. This effective tool helps potential home buyers bridge the gap between their purchasing power and current home prices in Sana Fe. Dedicated down payment assistance helps make homeownership possible for low income Santa Feans.

Ms. Altomare said through this program, Homewise works with buyers that are credit worthy and financially stable, and have gone through the financial and homebuyer educational programs. This way Homewise knows that the buyers are ready to own a home. This grant shortens the amount of time it would have taken for a buyer to save the down payment.

Ms. Altomare said one of the reasons that this program is important in Santa Fe is because people who work in Santa Fe often cannot afford to buy a home here. 37% of our local workforce actually lives in Santa Fe. The New Mexico Department of Workforce Solutions estimated that as of 2011, there are 29,140 works community to Santa Fe from elsewhere, compared to just 17,080 works who live in Santa Fe. This high commuter rate is a drain on the local economy as workers leave the area to spend their paychecks elsewhere. The National Association of Homebuilders estimate that households spend 63% of their income where they live. One-third of those people say they would be interested in moving to Santa Fe if they could afford to buy a home here. The potential local spending that could be captured in Santa Fe is $302,400,000.

Ms. Altomare mentioned that there is the idea that younger people and millennials are not interested in buying homes but the research does not show that this is true. She said over 50% of the Homewise homebuyers, every year, are under the age of 35. Younger people do want to buy homes but again, there are often affordability issues and sometimes this is around student loan debt, which hampers the ability to save for a down payment. She said attracting and retaining younger Santa Feans is really important to the growth of our city.

Ms. Altomare said Homewise has effectively used down payment assistance funds through the CDBG program since 2010 and other sources to increase the homeownership rate among Santa Feans who are at 80% AMI or below. She shared some information on the impact that this grant has had in Santa Fe noting that 109 homeowners were created ($1.6 million) and 53 of them are considered part of the millennial group. A number of senior citizens have taken advantage of this program as well. The different households that have been helped through the CDGB fund included: 42 single adults; 46 single parents (single moms and dads); 20 were married with children and 1 married without children. The highest need was in the single adult and parent category. The average down payment assistance through this program is $15,000. The employers of the home purchase clients include 24 local businesses; 17 hospitality industry; 17 national banks; 12 state and federal; 1 healthcare; 8 education and 4 from the City of Sant Fe.

Chair Villarreal asked if there were any questions from the Commission.

Commissioner Lopez asked if there are homes that they can afford.

Ms. Altomare said yes.

Commissioner Lopez asked where are they.

Ms. Altomare said yes, there are homes throughout Santa Fe and Homewise is a builder as well. She said they build 50 homes a year that are high quality, affordable and energy efficient. She noted that they have a real estate sales team that works on staff who are salaried and do not work on commission and they show the homes listed in the Multiple Listing Service (MLS) within Santa Fe. She said the typical home price is in the range of $200,000.

Mr. Loftin added that it got a little easier to find a home in Santa Fe after the recession and the prices went down but the prices are climbing again. He noted that there is also an opportunity with distress sales, short-sale or foreclosed homes and these can be some really good deals. Homewise has good relationships with realtors and they will call Homewise when homes become available to see if they have anyone who may be interested.

Mr. Loftin said the last thing they are doing is experimenting with building different kinds of affordable homes, i.e., smaller homes (500 square feet). He said they need to keep innovating on how to address the needs. He explained that a single parent with 1 child would not need or necessarily want a 1400 square foot house so they want to make sure there are other opportunities.

Commissioner Lopez asked if they surveyed young people because they indicated that their information was that young people do not want to own a home. She asked how did they gather that.

Ms. Altomare said they know this from their own clientele -more than half of their buyers every year are under the age of 35.

Mr. Loftin said there is a national survey that gets done annually and last year it came out that millennials wanted to buy a house in the next three years.

Ms. Ladd said she would like to address the inventory question. She noted that Homewise and the Housing Trust are under contract with the City to provide the homebuyer training and counseling for any private sector developer who goes through the Santa Fe Homes Program.

Chair Villarreal said if there are no other questions, the Commission will move on to the third application.

HOMEWISE-Down Payment Assistance (AHTF)

Mike Loftin, Laura Altomare and Kate Preteska presented the information regarding the request for funding, from the Application, which was distributed in the

members' packets.

Homewise is requesting $250,000 in AHTF funding to be used for down payment assistance loans for households under 120% AMI. These loans range in size from $5,000 to $20,000 based on borrower's need and are at 0% interest and will be due upon sale or refinance. In addition to down payment assistance, Homewise provides amortizing second mortgages to homebuyers that eliminate the cost of mortgage insurance thereby reducing the monthly mortgage payment and maximizing the amount which a homebuyer can borrow. The requested funds of $250,000 would help an estimated 27 homebuyers to achieve their home purchase goals.

Ms. Altomare said the repayments of the loans are revolved back into the AHTF fund for future buyers.

She said Homewise expects to leverage every AFHT dollar with $19 dollars and match each AHTF dollar with $3.78 of Homewise matching funds. Leverage will come from the Homewise Mortgage, which includes a first mortgage at 80% of loan to value and is sold to Fannie Mae for permanent funding. In addition, the borrower's cash contribution toward their home purchase also serves as leverage funds. The required match will come from the Homewise amortizing second mortgages, funded by Homewise from sources they have secured. It is the amortizing second mortgage that eliminates the need for mortgage insurance and maximizes the affordability to the homebuyer.

Ms. Altomare said Homewise has made 19 loans for a total of $230,000. The average down payment assistance loan is about $12,000. She shared the demographics of the clients who were served through this program since 2010 noting that the single parents and single adult grouping makes up the majority of the people who are utilizing this fund.

Chair Villarreal asked if there were any questions from the Commission.

Commissioner Hughes said he wanted to observe how many single adults and single parents are coming in to Homewise for housing.

Commissioner Padilla asked if they are seeing that as a national trend.

Mr. Loftin said the single parent is a national trend. He noted that there was a recent article that was written because a study was done that indicated that women have higher levels of buying a home than men do and it has been single women/parents.

Commissioner Lopez noted that President Trump signed an Executive Order that had to do with mortgage insurance. She asked what affect does this have for Homewise.

Mr. Loftin said that was for FHA insurance because FHA insurance is very expensive-it's almost a full extra point on the mortgage. He said they do not do FHA mortgages, only conventional mortgages. It is an efficient way to increase affordability, to eliminate this extra cost.

Commissioner Padilla said Homewise talked about a smaller home, he asked what else they are thinking about. He asked if there was any desire or any thought in-house about doing something really creative that this Commission and the City could get behind.

Mr. Loftin said he has a couple of responses to that and one is that there are things that just work, they are tried and true, like down payment assistance, it is not a new innovation but in Santa Fe this has gotten more traction than any other place he knows because they have stuck to some of those basics. Having said that, he said they have to be open to innovation, like a small house thing, where they can create affordability and that is important. Another area that they have spent a lot of time on energy efficiency and building a high-quality home that uses less energy. He noted that Homewise won the Parade of Homes Energy Efficiency Award three times and the Water Efficiency Award once.

Chair Villarreal asked if there were any more questions and there were none.

NEW MEXICO LEGAL AID (CDBG)

Rebecca Mnuk presented the information regarding the request for funding, from the Application, which was distributed in the members' packets.

New Mexico Legal Aid is requesting $15,000 in CDBG funding to provide foreclosure defense services in support of current low-to-moderate income homeowners. A NMLA attorney will provide quality legal assistance at no cost to low and moderate income Santa Fe homeowners at risk of foreclosure on their home mortgages. The attorney will seek to improve the homeowner's ability to avoid foreclosure and retain his or her home, or if retention is not possible, then help obtain a graceful exit that minimizes the harm to the homeowner. The attorney will assist homeowners through both direct representation and brief services such as limited representation or advice to pro se (self-represented) litigants. They anticipate serving 15 households through representation and an additional 12 households by providing advice for self-representing people at foreclosure workshops.

Ms. Mnuk said they are starting a working shop process that will be held at First Judicial Court in the Jury Room where they will provide a presentation about the foreclosure process. The workshops are open to everyone and are advertised through the District Court and the libraries. They also provide information on how to file Preventive Default Judgements. They will meet with clients who have questions after the presentations and they also send a closing letter to all of their clients recapping what was covered.

Chair Villarreal asked if there were any questions from the Commission.

Commissioner Lopez asked how many houses do they manage to save. She asked what they did with the CDBG funding that they received last year.

Ms. Mnuk said they received $10,000 from the CDGB grant last year. She noted

that they had a lack of cases last year in terms of getting new clients. She said a lot of the people that they see for the foreclosure program are people who had been in a good position to pay for a mortgage but something happens to them at some point that makes them unable to do this like a disability or a death in the family.

She said they are seeing a lot of people with disabilities who were on the process of getting on disability or could not work like they used to due to a disability or something, or they have lost a job or do contract work. She said over the course of the program, they have seen a lot of people who have very low incomes. She said to answer Commissioner Lopez's question, they have helped a total of 81 people in Santa Fe but over the last 8-9 months, a lot of the clients that have contacted them are over the income for a CDBG grant. They only have three individuals now and are hoping to get that number up through the workshop program and other increased outreach.

Ms. Ambrosino said that is actually a question she had. She said the current contract with CDBG is to fund attorney support to serve 22 low moderate clients. They have three clients now and Ms. Ambrosino asked if they anticipate meeting the contractual goal with 22 clients.

Ms. Mnuk said yes, that is her understanding.

Commissioner Lopez asked if they do outreach in any other place (like the Community Room at the Library) because District Court can be an intimidating place to go.

Ms. Mnuk said yes, they do outreach at other places and the Espanola Library is one of them.

Chair Villarreal said on that point, if they are getting referrals from the Court, she agreed that they should consider having the workshops at a more community-oriented place, like a library.

Ms. Mnuk said she had not thought about this but that is a good idea. She noted that they had one at the Mary Esther Gonzales Senior Center last year and they got a lot of people.

Commissioner Lopez noted that there are cuts being proposed for legal services by the current administration. She asked Ms. Mnuk if they have thought about this.

Ms. Mnuk said yes, and they are expecting to see some cuts for legal services but the Foreclosure Program specifically has other funding sources.

Chair Villarreal said they are on a tight schedule and need to move on.

KITCHEN ANGELS (CDBG)

**(Commissioner Padilla recused himself from discussion and voting on this funding request, having declared a conflict of interest.)*

Tony McCarty presented the information regarding the request for funding, from the Application, which was distributed in the members' packets.

Kitchen Angels is requesting $30,000 in CDBG funding to deliver free meals to low income homebound and chronically ill individuals, five days a week (with extra meals for weekends). The program helps keep these individuals in the comfort and safety of their own homes, reducing both reliance on and the cost for institutional care. Clients live throughout the greater Santa Fe area and would go without appropriate nutrition if they did not receive Kitchen Angels' services. Meals are formulated to meet individual dietary needs and follow one of six dietary tracks. Client nutritional needs are assessed by a Certified Nutritionist/Registered Dietitian.

He thanked the City for increasing their contract last year because the growth in new clients as grown steadily as can be seen in the chart that was included with the application. In 2016, the number of new clients was 233, representing a 37% increase in newly enrolled individuals over 2015.

Mr. McCarty said there are some new studies, some from the federal and some from the state and local agencies that extrapolates the number of actual homebound people living with chronic illness. They were able to extrapolate that 17% of the population in Santa Fe Count is homebound.

Mr. McCarty noted that they served 404 people last year and are covering about 22% of that population. He said the Board has been thinking towards – not only the growth in population – but also in particular the senior population. Kitchen Angels has increased their number of seniors with special dietary needs to 52% of their population over the course of the last four years.

He said their Board is geared up towards the future by taking over the space of the Angel Depot and just starting their renovation process with three goals in mind: 1) increase security in the building for the safety of the volunteers and staff 2) increase the flow of the program – streamline the process to produce more quality meals and 3) upgrade the building for energy efficiency.

Mr. McCarty said they included the ways (in their application) that their program fits with the Santa Fe County Senior Services Strategic Plan 2016-2020. He said for the first time in the history of Kitchen Angels, they served 100,000 meals in 2016.

Mr. McCarty noted that he mentioned last year that they will be opening a Thrift Store to increase their earned income and he is happy to report that they doubled their projections. Donors have really responded by cleaning out their cupboards and closets and bringing in wonderful things to sell.

Mr. McCarty distributed and reviewed the *2016 Volunteer Report* noting that 55% of their volunteers are long-term volunteers with 16% being engaged/active for up to 24

years in the program. He mentioned that they are just beginning their 25th year in operations and active volunteers have worked a total of 1,892 years, an average of 5 years per person. He said the gender distribution of volunteers reflects the clients that Kitchen Angels has – 64% are male and 36% are female. He said this represents about $800,000 when you put a volunteer valuation on this and that is how they leverage the CDBG funding in the community. He said these are the highlights of the program and asked if there were any questions.

Commissioner Hughes asked how many people are able to stay in their homes.

Mr. McCarty said this is one of their measures and Kitchen Angels improved the ability for people to live independently. Last year, 95% indicated that these services helped them to live a more independent life, up from 92.4% in 2014. He apologized for not having the specific number of people who were able to stay in their homes on the top of his head. However, from a cost perspective, it costs $1,771 each year to feed a Kitchen Angels client compared to $77,650 it costs each year to house a person in a nursing home.

Commissioner Hughes said it would be useful to have that measure.

Mr. McCarty agreed to get that number.

Commissioner Lopez asked if they are able to serve everybody that comes to them.

Mr. McCarty said they do not have a waiting list.

Chair Villarreal said primarily, Kitchen Angels is looking at people that are of a certain income but are they getting a range of people who need assistance who may have means but may be dealing with an illness.

Mr. McCarty said yes and the people who are above the federal poverty level increased to 7% therefore 90% of their clients are at, or below the federal poverty level guidelines. The 7% are people who have had car accidents where they have had some kind of debilitating reason that they cannot get out and about. They do not have friends or family to support them.

Mr. McCarty noted that cancer remains the largest single category of medical diagnosis for Kitchen Angels clients. However, chronic diseases such as diabetes and cardiovascular disease are also prevalent.

Commissioner Lopez asked Mr. McCarty if they have considered the senior "tsunami" that is projected (where the senior population is expected to triple between now and 2040).

Mr. McCarty said their Board has their annual meeting in January and this topic was discussed but they did not make a definite decision on which way to go.

Chair Villarreal said the Commission has a tight schedule and needs to move on.

ADELANTE (CDBG)

Gaile Herling presented the information regarding the request for funding, from the Application, which was distributed in the members' packets.

Santa Fe Public Schools Adelante Program is requesting $30,000 in CDBG funding to expand the Elementary Liaison Project and provide multi-level services for up to 200 families. The expanded Elementary Liaison Project will focus on accessing affordable, safe, stable housing and supportive services as well as success in school for the largest growing population of those experiencing homelessness both nationally and locally – elementary age children and their families.

The Elementary Liaison Project is now in its second year, linking Adelante parents, and their children from K-6th grade to the Adelante Case Manager and school personnel in order to promote the children's success through accessing stable housing, public benefits and family well-being via more effective services, resources, referrals and linkages. SFPS Adelante will hire another part-time Elementary Liaison and will also make use of a Highlands University BSW Intern as an assistant for the Elementary Liaison Project. Annually,

Ms. Herling said their average age is age 9 and Adelante usually serves 700+ elementary students with 20 elementary schools to cover. Adelante identified 710 children attending elementary schools in unstable housing/homelessness – 42% of their entire population. She mentioned that they want to make sure that kids graduate from high school and go to college or vocational school.

Ms. Herling asked if there were any questions.

Commissioner Peterson asked what specific services are provided to kids and families and how does an Adelante counselor help somebody.

Ms. Herling said the Adelante counselor often gets phone calls as referrals about kids who are not in the program and she screens families to ensure that they qualify for the program. For instance, they help kids who need transportation or help with the computer to register for school. The Counselor will also find out why a student is missing school. They also help kids who are bilingual and they work with the parents to move kids to schools and match them with a bilingual tutor or counselors. The Adelante counselor ensures that kids are getting their basic needs met and some examples are: clothing, backpacks and school supplies, diapers, hygiene items, furniture and household goods. Adelante's goal is to promote family stability towards long term housing and promote a successful education for children ages 5-15 to help reduce homelessness and the poverty rate.

Commissioner Padilla said the Commission is looking at funding for an additional liaison for the Adelante Program. He asked Ms. Herling if this is correct.

Ms. Herling said yes, that is correct, it would be funding a part-time liaison position and this includes benefits, which are 40%. She noted that no one else is doing this in the schools.

Commissioner Hughes asked Ms. Herling if she could provide an example of where staff helps prevent homelessness.

Ms. Herling said thanks to the Children and Youth Commission, Adelante was provided funding to do a template to collect data. She said Adelante is doing more than what they thought they were doing. She said what she means by this, is that Adelante has a Homeless Emergency Fund where they can help keep families in their homes and prevent eviction and/or utility disconnections.

Commissioner Hughes said he appreciate the matrix but he was looking for a story.

Ms. Herling shared a story where a family had an illness or a serious health issue and the breadwinner lost his job and was at risk of being evicted. The Elementary Liaison can help prevent these unfortunate and sometimes unjust situations from occurring, since they get to know the parent through providing basic aid and services to their children, and link the family to case managers or another appropriate agency. Adelante also assists families with applications for housing, public benefits, Social Security, and emergency financial aid and employment assistance.

Commissioner Lopez asked how Adelante identifies these people – where someone may be living in an unstable housing situation or is homeless.

Ms. Herling said their first question for people is to tell them about their current living situation and then they "dig deeper".

Commissioner Peterson said last year CDBG funding was used to help fund the current Liaison. He asked how the position that CDBG helped fund last year is being supported this year-what is paying for that.

Ms. Herling said Adelante is going for other grants and private donations. They recently a grant from a foundation that will pay for quite a bit of her salary. The CDGB funding requested will pay for most of her benefits.

Commissioner Peterson said he just wanted to make sure the position is secured and it sounds like it is.

Chair Villarreal said they have run out of time and need to move on.

ESPERANZA SHELTER (CDBG)

Denise Verineulen and Jorge Fonseca presented the information regarding the request for funding, from the Application, which was distributed in the members' packets.

Esperanza Shelter is requesting $32,500 in CDBG funding for their Emergency Housing Assistance Program to assist low-income domestic violence clients in emergency situations while seeking safety. Assistance consists of providing essential temporary housing to include house/rental payments and utility payments. Each year, Esperanza provides a variety of services to approximately 1,000 people and in the past year, they helped 20 families with this kind of assistance.

Ms. Verineulan noted that more than 90% of their clients are extremely low income because they are not employed and more than 90% of their clients live below the poverty line.

She said Esperanza estimates that the $32,500 will provide emergency housing for 60 days for 21 families ($1400 x 21= $29,400). The balance of $3,100 would be used to help families with utilities. Esperanza Shelter currently has no other funding for this kind of emergency assistance.

Commissioner Lopez asked if they have been providing these services from other sources.

Ms. Verineulan said yes, they have.

Commissioner Lopez asked what happens after 60 days.

Ms. Verineulan said this is not the perfect program because they do not have funding for transitional living but they are working to find other grants to find funding for safe transitional housing for these clients. She noted that the typical stay that CYFD will pay for in their shelter is three months and that is not long enough either.

Commissioner Lopez asked if the housing exists that these people can afford.

Mr. Fonseca said in the recent past, the source for the inventory of transitional housing was contracted for with different apartment units on the southwest side of Santa Fe and Cerrillos Road. This effort was largely funded through a HUD program that does the Continuum of Care program but they have found that there are a number of challenges for them with the HUD aspect of the program.

Mr. Fonseca said they have put together a strategic plan for a long-term housing program.

INTERFAITH COMMUNITY SHELTER (CDBG)

Lisa S. Vakharia and Joseph Jordan-Berenis presented the information regarding the request for funding, from the Application, which was distributed in the members' packets.

Interfaith Shelter is requesting $65,000 in CDBG funding for their Women's

Summer Safe Haven shelter. Women's Summer Safe Haven keeps women safe during the time when the seasonal shelter is closed. The Shelter provides safety, security, offers community, socialization, reduction of stress and anxiety and will serve 20-30 women per night from May to October. The Shelter provides a safe place to be as an alternative to camping alone or partnering with a man for protection.

Mr. Jordan-Berenis gave a brief history of the Interfaith Community Shelter. They are largely a volunteer agency consisting of 40+ faith and community groups with more than 2000 volunteers. Their mission is to provide safe, hospitable shelter, food and clothing to men, women and children experiencing homelessness in the city of Santa Fe, by promoting self-reliance by providing a point of entry to other services necessary to make the transition from homelessness to stable housing.

Mr. Jordan-Berenis said they are the only "come as you are" shelter in northern New Mexico, which means they accept everyone, including those who are inebriated and most of the women they serve are between 45-65 years of age, which chronic long standing mental/behavioral health and substance abuse issues. The only criterion for entry into the Women's Summer Safe Haven Program is the guests' willingness to abide by the rules.

Mr. Jordan-Berenis said originally the reason the Interfaith Community Shelter was established was to prevent death due to hypothermia but by the end of the summer of 2015, they had two women, who were guests in the seasonal night shelter, and were beaten by their partners, another who was a victim of domestic violence, died of an overdose in a motel room and the death of another women at a homeless campsite within the City where the police never determined was a homicide or an accidental death. In response, last year the Board of Directors fundraised additional monies necessary to keep the shelter open during the summer months for women and children experiencing homelessness in Santa Fe.

Mr. Jordan-Berenis said last year, they served 1,263 individuals for 19,101 bed nights, including 308 women. He said the need for the Women's Safe Summer Haven is to keep women safe during the time when the seasonal shelter is closed.

Mr. Jordan-Berenis said in addition to shelter, food, clients are provided full access to array of services provided by Interfaith Community Shelter's 14 partner providers in the Day Services Program.

Ms. Vakhira said she works with 10-15 non-profits in town and these people are using 2000 volunteers a year to staff this organization with three paid employees. She said this is incredible and they will use the money extremely wisely and she could not think of a better way to help the women and children of Santa Fe. Also, this project fully meets the CDBG National Objective - to benefit to low and moderate income persons or households and address an urgent community need that threatens the health and welfare of residents. She said this is important and they are providing a gap with these services. She said it is incredible that they are serving over 20,000 people in the community with three paid employees.

Chair Villarreal asked if there were any questions of the Commission.

Commissioner Peterson said there seems to be different budget information provided because it states that the total budget is $175,000 and $663,000.

Ms. Vakhira said the total budget for the Summer Program is $175,000 and the $663,000 is the total budget for the agency.

Commissioner Peterson said page 29 states that they have over half a million dollars for funding this program, and he would suspect that this is not funding for this program.

Ms. Vakhira said this is not funding for this program, it is funding for the agency.

Chair Villarreal asked where are the other funding sources coming from.

Mr. Jordan-Berenis said they applied to CHRISTUS St. Vincent in Dallas, Texas. They asked them for $75,000 and they have a good shot at getting some funding from them. They have not heard back from them yet. There was also a couple of donations from private organizations, i.e., Thornburg Foundation, the Kind World Foundation and the Paradise on Earth Foundation but all of them have to be matched. He noted that they have matched some of the City funding that was received last year. He said they did a couple of fundraising efforts last year.

Chair Villarreal asked if this will happen again this year.

Mr. Jordan-Berenis said he did not know, they need to re-evaluate that for this year – depending on the funding they receive - but he intends to make some phone calls.

Commissioner Peterson asked Mr. Jordan-Berenis what would happen if the funding does not come through or if the CDBG is partially funded.

Mr. Jordan-Berenis said they plan to do a fundraising drive in the spring.

Ms. Vakhira said this is a community need and they would be grateful for any CDBG funding to fill this gap.

Chair Villarreal said she needs clarification on the number of people they serve.

Mr. Jordan-Berenis said they serve an average of 22 people per night for a total of 3200 nights. He mentioned that they need to expand the dormitory area.

Chair Villarreal asked if these tend to be the same women coming in the summer.

Ms. Vakhira said this can vary.

Mr. Jordan-Berenis said some women have been successful in obtaining housing.

Lunch Break-reconvened at 1:00 p.m.

YOUTH SHELTERS (CDBG)

Dan Bailey and Daniel Block presented the information regarding the request for funding, from the Application, which was distributed in the members' packets.

Youth Shelters is requesting $20,551 in CDBG funding to serve more homeless youth through the Street Outreach Program. This will allow a larger number of young people to receive the services they need to leave the streets and achieve safety and stability. They will serve at least 625 homeless, runaway and in-crisis youth through the Street Outreach Program this coming year, an increase of 25 young people (minimum). This averages to $33 per youth. This will be accomplished with the same staffing and funding level as the current CDBG grant. The demand for services has been far greater than expected, and it is imperative that they are able to assist the additional youth seeking help.

Mr. Block said they estimate that there are as many as 100 youth in Santa Fe who are homeless, at-risk and are the most vulnerable kids in the community. There is almost always severe family disruption due to problems such as abuse, neglect and addiction. Many of these youth camp in the mountains, live in cars, or sleep in abandoned buildings. Some run away thinking they will be safer on the streets. Others were thrown-out due to being gay, pregnant, or simply not wanted. These unaccompanied youth, some minors, are on their own.

Youth Shelters and Family Services has been serving homeless, runaway, and in-crisis youth since 1980. The objective was for them to obtain safe and stable housing. In 1995, they began distributing sandwiches, clothing, tents, sleeping bags, toiletries and resource information to youth on the streets. This was the beginning of the Street Outreach Program.

Mr. Block said many of the youth are found by the street-based outreach. The Street Outreach Program has two components: street-based outreach and a Drop-In Center. This happens six days a week, generally in the afternoons and early evenings. Locations include Santa Fe Plaza, Cathedral Park, Pete's Place, skate parks and other places that youth congregate. Young people who are newly homeless usually learn about these resources from other homeless youth or homeless adults. A great number of these youth depend on Youth Shelter's services for food, water, clothing, toiletries and comprehensive support so they can move forward in life. Youth Shelters is seeing the number of homeless youth increasing, both on the streets and in their Drop-In Center. At the Drop-In Center, youth can get a meal, take a shower, do their laundry and obtain case management services and support and access for free medical services through Healthcare for the Homeless. Youth Shelters is the only agency in Santa Fe who is addressing these needs with the comprehensive services.

Mr. Block said one of the things they are thinking of doing next year - to leverage the CDBG funding - is to bring in volunteers to work with the Street Outreach Program and

double up and go out in the streets to bring in more youth.

Mr. Bailey said last year with the CDBG funding that was granted to them, Youth Shelters added a street outreach worker at 25 hours a week to serve more youth. They projected that they would reach an additional 100-150 young people on the streets and as of December 31, 2016 (half-way through their fiscal year) they had already served 586 youth and that number is expected to increase.

Mr. Bailey said the bottom line is that there are far more youth on the streets that need their help, and there is simply nowhere else the youth can receive the services that Youth Shelters provides. He said if Youth Shelters does not receive the CDBG funding, they will not be able to maintain the Street Outreach position and they will have to decrease the number of youth they serve rather than increasing this.

Chair Villarreal asked if there were any questions from the Commission.

Commissioner Lopez asked if they turn people away because it sounds like the need is huge.

Mr. Block said they cap them at 24 years of age and if anybody older than 24 years of age shows up at their facility, they will provide them direction to other resources in the community. He said the only other cause for them to ask somebody to leave is if they are posing a threat or are being violent, harassing in some way or seeking harm.

Commissioner Lopez asked how many employees they had at the Drop-In Center.

Mr. Bailey said four of which two are part-time positions. He said with the CDBG funding that was allocated, they have been able to extend the hours of the Drop-In Center and offer case management services to the additional youth they have been able to reach.

Mr. Block said on their plan to leverage the CDBG dollars, they plan to link volunteers with Street Outreach workers so that they travel in teams.

Commissioner Lopez asked how Youth Shelters provide food, do they cook the meals there.

Mr. Block said they have donors who provide the food, such as the Food Depot. They do not have full meal services there because they are not licensed as a food center.

Commissioner Lopez asked how many youth are at the Drop-In Center every day.

Mr. Block said they have had up to 30 kids a day but the average is 15 kids a day.

Commissioner Lopez asked if they were open every day of the week.

Mr. Block said yes.

Commissioner Lopez asked him what kind of successes are they seeing.

Mr. Block said one of the greatest success story is kids telling them that they are saving their lives because they come in from the cold and they are able to get dry clothes, take a shower, get a meal and stay with them until they warm up. He said they are operating at a survival level and taking care of the youth's basic needs. The youth are linked to the proper medical care and this is another success. Also, being able to educate them on the other services in the community and link them with those services that can help them is a success as well.

Commissioner Lopez asked if their staff is networked with the other providers.

Mr. Block said yes.

Mr. Bailey said there are many success stories but there is one that is particularly moving. He shared a story where a street outreach worker found a 14-year-old pregnant girl behind a dumpster and she had not received any prenatal care. They were able to get her food, immediate medical care and she gave birth successfully and was able to obtain housing.

Commissioner Lopez asked what they do with kids who are addicted or have mental health needs. She asked if they turn them away.

Mr. Block said it depends on their level of behavior.

Mr. Bailey said they will also refer them to other community resources for mental health services, medication and psychotherapy.

Ms. Ambrosino asked if Youth Shelters has been able to measure the youth they serve with the Street Outreach Program and who may eventually go into the Transitional Living Program. She asked if they have been able to implement any results or performance-based measures.

Mr. Block said they do coordination between the two programs making sure that the both programs know what is available in housing and they are able to track this.

Chair Villarreal said they are out of time and need to move on.

ST. ELIZABETH SHELTER-Casa Cerrillos (CDBG)

Deborah Tang, Jim Podesta and Michael Bartlett presented the information regarding the request for funding, from the Application, which was distributed in the members' packets.

St. Elizabeth Shelter is requesting $43,750 in CDBG funding to repair five remaining original attic units to improve ventilation and maintain structured integrity of the building.

Casa Cerrillos is a two-story, two-building, 28-unit apartment complex that provides permanent housing along with supportive services for homeless individuals with disabilities along with a wide range of supportive services designed to help them maintain their housing and independence. There is an attic space designed to provide ventilation above the second floors of each building and below the roof – six spaces in all – that are in rapidly deteriorating structural condition and no longer provide ventilation to the units below. They have repaired one of the units and are now seek funding for the remaining five others. The construction costs are: 5 attic units @ $8,750 per unit.

Ms. Tang said Casa Cerrillos has been around for about 20 years and is one of the largest housing programs they have. The proposed project will help maintain Casa Cerrillos so it can continue meeting the housing needs of the areas' homeless adults with disabilities while providing them needed supportive services to help them obtain income and/or entitled benefits, better address their healthcare issues, and maintain housing and improve their quality of life.

Mr. Podesta said last year they were working on one of the units and trying to figure out a way to get all the units up to par. In the process, they found inadequate venting in between the ceiling and the attic and they are concerned that this could be a potential mold issue.

Chair Villarreal asked if there were any questions from the Commission.

Commissioner Lopez asked where are these units.

Mr. Podesta said behind the old Country Dan's facility, right next to Chili's.

Commissioner Hughes asked if this is catagorized as a housing or public facility request.

Ms. Ambrosino said it is a housing request.

Commissioner Lopez asked them if they are looking for money any place else.

Mr. Podesta and Mr. Bartlett said no.

Chair Villarreal said the Commission will now move on to the next request.

ST. ELIZABETH SHELTER-Siringo (AHTF)

Deborah Tang, Jim Podesta and Michael Bartlett presented the information regarding the request for funding, from the Application, which was distributed in the members' packets.

St. Elizabeth Shelter is requesting $63,840 in AHTF funding for the Siringo Senior Housing Program Bathroom Remodel. The program provides 8 apartments along with a

wide range of supportive services for formerly homeless seniors 55 and older. Below-market rents are set at one-third of each resident's monthly income. All residents are very low income, have disabilities and work closely with the on-site program manager to address the issues that led to their becoming homeless – alcohol and/or substance abuse, behavioral health, poor life skills, etc. – in order to maintain their housing and independence.

Three construction bids for the project were included with the application.

Ms. Tang noted that many of the people who are in their program were formally homeless and have become fragile due to long exposure to the elements. These programs provide case management and support for the people who are living in these programs. She said they have a Case Manager and a Program Manager whose salaries are partially funded by HUD. They ensure that people are getting the support that they need to maintain their housing and obtain the services in the community, like mental health services.

Mr. Podesta said this is permanent housing and people do not want to leave. He explained that St. Elizabeth serves more than 2000 homeless individuals per year, including providing emergency shelter and supportive services to more than 650 without any charge, along with transitional and permanent housing to more than 100 at a very below-market rent (one-third of monthly income). Doing so, requires an annual operating budget of nearly $1.6 million, which is an ongoing challenge to raise since 70% of the annual income needed must come from private philanthropic donations.

The eight apartments at Siringo are 100% occupied with a significant waiting list. Most residents view this as their final home, and there is a great demand for this housing. The Siringo program, with its on-site manager and supportive services, provides a safe and secure space to comfortably age in place. The renovated bathrooms will enable most residents to successful remain living there into the foreseeable future if they wish.

Chair Villarreal asked if there were any more questions of the Commission and there were none.

YOUTHWORKS Facility (CDBG)

Melynn Schuyler, Sean Spieyelman, Joseph Salazar-Lopez, Tamara Zaurstowski and Lee Lesne presented the information regarding the request for funding, from the Application, which was distributed in the members' packets.

Youthworks is requesting $65,000 in CDBG funding for energy efficiency and health and hygiene facility upgrades, solar panel system and private youth shower room installation. They have to meet the 1) final phase of a multi-year energy efficiency facility upgrade plan and 2) to assist with the installation of a private shower room for participant use to meet health and hygiene needs in YouthWorks Workforce Development and Alternative Education Center. Project 1: Photovoltaic solar panel system installation is at the last recommended upgrade for facility energy efficiency. Solar panel system installation of approximately 37 solar panels will save nearly $3,000 a year in energy costs

and lower their ecological impact. Youth participants will be actively engaged in workshops with solar professionals to gain knowledge about the installation and use of solar for energy efficiency, and clean renewable energy.

Project 2) Additionally, YouthWorks plans to install a much-needed private shower room in the facility to address youth participants' hygiene and health needs and to enable access to health and hygiene for youth participants that face housing insecurity and homelessness. Due to the rising numbers of youth and young adults facing housing insecurity that seek services at YouthWorks, the addition of a shower will improve workforce and education readiness as youth strive to reach their education and work goals.

Ms. Schuyler introduced Sean Spieyelman, Joseph Salazar-Lopez, Tamara Zaurstowski and Lee Lesne noting that they are all in different stages of their engagement with YouthWorks and their careers.

She noted that YouthWorks is in the last phase of the Energy Retrofit Audit from 2014 where they were given recommendations by the Department of Energy auditor. She said they just completed a roof replacement project that improved insulation and energy efficiency and removed a very old dilapidated roof on the facility, and is now ready for solar panel system installation. The addition of the solar panels will save approximately $2,666 annually in the first year and will enable YouthWorks to use clean, renewable energy going forward in a sustainable manner for the future.

Ms. Schuyler said 1200 youth come to YouthWorks per year for different services like education and job training. Of the 1200 youth, more than 350 fully participate in all of YouthWorks services over the course of the year, taking advantage of the full suite of education, job training and job placement services.

She said Sean Spieyelman is new to the program. She asked him to speak.

Mr. Spieyelman said he is more familiar with the shelter aspect of YouthWorks and he is in the Youth Build Program. He said prior to YouthWorks, he was staying at Pete's Place but it is not a safe place. He thinks Pete's Place is for alcoholics and drug addicts.

He said YouthWorks has been providing him a place to sleep, breakfast and dinner every day. This has been very helpful and a blessing to him and he is very appreciative of this. He said the shower thing is a big thing. He noted that they were given passes to the Genoveva Chavez Center and they have been taking showers and working out there.

He said YouthWorks also helped him get his social security card and a driver's license. He said he does not know where he would be if he had not heard of YouthWorks.

Chris Sanchez asked him to tell them a little more about the shelter.

Mr. Spieyelman said they have stayed at three churches so far (Temple Beth Shalom, the Unitarian Church and Zia Church). They provide a warm, safe cozy place to

sleep and some of them have TVs. They cook for the youth and they play games with them.

Mr. Salazar-Lopez said he is a graduate from YouthWorks and they have helped him in so many ways. They have helped him get work, get his birth certificate, a social security card and his driver's license. They also helped him find a place to live and they helped him get his GED. He said most importantly, they have given him something that he will always be grateful for and that is a family. He said they always want to help and that is a really great feeling.

Chair Villarreal asked if there were any questions from the Commission.

Commissioner Hughes said it looks like a 19-year payback and that seems to be high.

Ms. Schuyler said they have included the bids for this.

Commissioner Hughes offered his assistance with the solar panel project to find ways to bring this amount down. He asked if the youth will be involved in the installation.

Ms. Schuyler said yes.

Ms. Ambrosino asked if they have talked to anyone in the Land Use department to verify that this conforms to the local plans and zoning requirements-with regards to the solar panels and shower.

Ms. Schuyler said she does not believe so but they had two GB98 individuals bid on the project and she has to rely on what they tell her.

Commissioner Padilla said in following up with staff's question, he would not rely on the GB98 to do that. He would be happy to visit the facility to help them with the city process. There are a number of things that need to be considered and if there is an increase in water use, this could impact the budget.

Commissioner Lopez asked Ms. Schuyler to talk about the need.

Ms. Schuyler said affordability for a home is so high and there are no available apartments and nowhere to live. This is what is causing homelessness more than anything else.

Commissioner Padilla asked if the youth have had other youth with them because there is a significant amount of homeless youth out there.

Mr. Spielyman said there are a lot of youth out there but they are not here today. He explained the cops have arrested youth who are sleeping outside.

YOUTHWORKS ShelterNow (AHTF)

Melynn Schuyler, Sean Spieyelman, Joseph Salazar-Lopez, Tamara Zaurstowski, Gaile Herling and Lee Lesne presented the information regarding the request for funding, from the Application, which was distributed in the members' packets.

YouthWorks is requesting $51,800 for the ShelterNow! Project, which is a collaboration of youth-serving organizations that have joined forces to address the gap in housing availability and homelessness for young adults ages 18-24. It was formed from a working group of concerned organizations that work daily to serve the highest need youth and young adults in Santa Fe. Over the past two years, Santa Fe's community of youth providers have been serving for an appropriate, effective way to temporarily house unaccompanied and dislocated youth in need of shelter during the cold winter months.

Santa Fe's Adelante Homeless Youth & Children Task Force has been exploring this issue through a working group, based upon agency-reported evidence and direct observations that up to 200 youth, ages 18-24 have been disconnected from school, stable housing, consistent work and the many traditional systemic services/benefits. Currently there is no developmentally appropriate shelter for young adults ages 18-24 in the Santa Fe area.

The AHTF funding will provide a per youth/per day subsidy emergency shelter voucher. This voucher will allow Shelter Now to expand the number of weeks of service from its current 12 weeks to 20 weeks and the support services during operation next winter. They plan to provide the shelter from December 2017 through April 2018.

Ms. Schuyler said Mr. Salazar-Lopez is employed in multiple places and is on staff for the Shelter Now project. He is mentoring the young people who are part of this shelter project.

She said YouthWorks is the fiscal umbrella for a project that came together as a result of Santa Fe Adelante Homeless Youth & Children Task Force exploring the issue of searching for an appropriate, effective way to temporarily house unaccompanied and dislocated youth in need of shelter during the cold winter months. The Task Force explored this issue through a working group, based upon agency-reported evidence and direct observations that up to 200 youth, ages 18-24 have been disconnected from school, stable housing, consistent work and the many traditional systemic services/benefits.

Ms. Schuyler introduced Lee Lesne of the Kind World Foundation.

The Kind World Foundation called Adelante after reading an article about one of the unaccompanied homeless youth who was 18 and hoping to graduate school this year. The Foundation was concerned that this student and many others are left to couch surf from home to home or live outdoors, especially during the winter months.

The Foundation challenged the Youth & Children Task Force to raise matching

funds and initiate an emergency shelter by January 15, 2017. The Foundation offered them a grant of $50,000 and challenged them to raise the remaining needed funds and get the shelter running as soon as possible. By January 15, 2017, an additional $25,000 had been raised by the Collaborative Shelter Working Group from private donors and local foundations to meet the emergency match.

Ms. Schuyler said there were a lot of people who worked together to get this done and there is more detail in the writing and she would like other people to speak.

Ms. Zaurstowski said she will start. She noted that she is the Coordinator with Shelter Now. She does the case management during the day and opens/runs the shelter in the evening. The Shelter is currently being housed at the Interfaith Community so they rotate at different churches each week for a full week period.

She said from January 16th to today, she has had 15 youth at the shelter-ages 18 to 24. She said she could not imagine them being on the street because they are all deserving, great young human beings that deserve this opportunity. She explained that the youth originally came in kind of nervous and probably scared based on what they had experienced on the streets but they are now a family. They work together, they communicate together, they function together in our community and they are truly a family.

Ms. Zaurstowski said she cannot imagine what is going to happen in May, much less next winter and she will do anything to support this program and she hopes that the City does as well.

Ms. Lesne said Kind World really believes in the power of seed money to get things going. She said they were funded by the sale of Gateway stock and they really believe in small grants, deployed at the right time to organizations that are already on the ground doing the work. They also believe in the power of public and private partnerships and working with businesses and city government.

Ms. Lesne said we have this underutilized capital and that is our youth. In this City – where housing is so expensive - there is no place for a lot of these youth to go. She said all kinds of moral dilemmas are created by trying to find a safe place to stay. She said there is something inspiring about kids being around kids their own age. Also, the faith community is role modeling positive community involvement and they are willing to give the youth an opportunity to move forward. She thinks they will have a great success rate with this.

Ms. Lesne said she would like to see this extend to the summer months – even though kids are not going to freeze on the streets - the risks are still out there. She mentioned that Kind World helped Pete's Shelter to keep women and children housed during the summer because they were going to get kicked to the streets. So, Kind World does have an investment in dealing with our most vulnerable population.

Mr. Herling said they have four youth who have been connected with the LifeLink

already and one applying to Casa Milagro because he needs more care. She believes this would not have happened without Shelter Now and this is why she is committed to it. She said this is a mission of Adelante as well. She noted that a youth froze several years ago; he got hypothermia from drinking too much and he could not find where he was staying.

She said this Shelter has guidelines, rules and a great structure. She said YouthWorks is fantastic in terms of being the lead agency running the Shelter. She said she is proud to be a part of this project because it is making a difference.

Chair Villarreal asked Ms. Herling if there was a cut-off date for the youth shelter.

Ms. Herling said yes, it is cut off at the age of 17.

Mr. Sanchez asked if YouthWorks is moving towards working with the homeless.

Mr. Schuyler said they do not define their work as working with the homeless.

Mr. Sanchez asked if there was criteria for youth to go into the shelter.

Ms. Zaurstowski said this is based on referrals. She said there are strict rules and guidelines that they must follow and they sign off on the guidelines: no alcohol, no sex, no violence, no weapons and they have to show some kind of level to progress, and to do something and to get off of the streets.

Commissioner Lopez said she would imagine that moving to a church every week raises a lot of issues.

Ms. Zaurstowski said it is tough but all the church's and congregation has really embraced them like family. They cook meals for the youth and they are participating and interactive with the youth by playing games with them and talking to them.

Commissioner Lopez asked if she is the one that coordinates with the churches.

Ms. Zaurstowski said yes, it is a combination between her and one of the Managers at YouthWorks. She said this is raising awareness. She noted that the location is not disclosed until the night that they will stay at the church.

Ms. Herling said the City has been supportive and they are helping them look for a site for a shelter.

Commissioner Padilla asked if it is the same youth and are they limited on the amount of youth they can take in.

Ms. Zaurstowski said it usually is the same youth and for now they are limited to 24 youth.

Chair Villarreal said the time is up and the Commission needs to move on to the next request.

SANTA FE RECOVERY CENTER (CDBG)

Sylvia Barela presented the information regarding the request for funding, from the Application, which was distributed in the members' packets.

Santa Fe Recovery Center is requesting $50,000 in CDBG funding for some necessary upgrades to its HVAC system to improve air flow, improve air quality, and improve filtration system and an upgrade to the medical office of the residential program. The system needs renovation to include rebuilding filter holders in the furnaces and work on the return air vents in the floor, which are collapsing. The maintenance person has maintained the HVAC system to the extent possible but it is now being recommended by HVAC companies that have looked at the vents that they be rebuilt. The final piece of renovation that they are requesting funds for is to replace the counter tops and flooring in the small medical office. This office is used 24 hours a day, 7 days a week and the floors and counter tops are chipped and gouged.

Ms. Barela distributed copies of some bids to do the rebuilding of the air vents and for doing the countertops. She said she hoped to have three bids for each of the projects for the Commission today but she was unable to get all of them.

She gave a brief history of Santa Fe Recovery Center noting that it is a private non-profit substance use disorder treatment program providing residential, outpatient and medication assisted treatment services in the city of Santa Fe. They are the only residential substance use disorder program in Santa Fe. They provide these services to 600 clients and their families each year. 95% of which have low to moderate incomes.

Ms. Barela noted that they received their fifth visit from the Commission of the Accreditation for Rehabilitation Facilities and the survey went well.

Ms. Barela asked if there were any questions of the Commission.

Commissioner Lopez asked what is the problem with the vents.

Ms. Barela said they are collapsing within themselves.

Commissioner Lopez asked Commissioner Padilla why they would be collapsing.

Commissioner Padilla explained that it could be a number of things from the construction process to the quality of the installation. He said it does not appear to be a structural issue.

Commissioner Lopez asked if they are confident that this would fix the vents.

Ms. Barela said yes, they have been reassured that this would fix the issue.

Commissioner Hughes suggested that they do away with the vents and do mini-splits.

Ms. Ambrosino asked what is the dollar portion for the air vents.

Ms. Barela said $37,000.00.

PRESENTATIONS CLOSED – CDC DISCUSSION

COMMISSION DISCUSSION WITH STAFF ANALYSIS FOR 2017-2018 PROGRAM YEAR AND COMMISSION'S FUNDING ALLOCATION RECOMMENDATIONS (Margaret Ambrosino)

The discussion and deliberations of the 2017-2018 Program Year and funding allocations began at 2:45 p.m.

Expected Total 2017-2018 Funding	$500,000
(minus Administration)	$100,000
Total project funding	$400,000
Public Service Limit not to exceed 15%	$ 75,000

The Commissioners completed CDBG and AHTF Score Sheets for each of the organizations. The projects were discussed in detail and the Commissioners took into account other funding sources for the organizations. After discussion and deliberations, the following motion was made:

Commissioner Peterson moved to recommend funding the CDBG and AHTF funding requests as follows:

Housing	
Housing Trust Down Payment Assistance (CDBG)	$ 100,000.00
Housing Trust Down Payment Assistance (AHTF)	$ 160,000.00
Habitat Home Improvement (CDBG)	$ 60,000.00
Homewise Home Improvement (CDBG)	$ 21,250.00
Homewise Down Payment Assistance (CDBG)	$ 100,000.00
Homewise Down Payment Assistance (AHTF)	$ 177,000.00
St. Elizabeth's Siringo Apartments (AHTF)	$ 63,000.00
St. Elizabeth's Casa Cerrillos (CDBG)	$ 43,750.00
SUBTOTAL HOUSING	**$ 825,000.00**
Public Service (15% cap)	
($75,000 Total Funding Limit)	
SFPS Adelante Elementary	
School Liaison (CDBG)	$ 30,000.00
Interfaith Community Shelter (CDBG)	$ 24,449.00
Youth Shelters (CDBG)	$ 20,551.00
SUBTOTAL PUBLIC SERVICE	**$ 75,000.00**

Public Facilities (No cap)	
SUBTOTAL PUBLIC FACILITIES	**$ 0**
TOTAL	**$ 900,000.00**

Commissioner Padilla seconded the motion. The motion passed unanimously by voice vote.

The percentages for limit categories will adjust up/down based on the actual final allocation.

APPROVAL OF MINUTES: November 16, 2016 CDC

Commissioner Hughes moved to approve the Minutes of the November 16, 2016 CDC meeting. Commissioner Peterson seconded the motion. The motion passed unanimously by voice vote.

ITEMS FROM THE COMMISSION

There were no items from the Commission.

ITEMS FROM THE FLOOR

There were no items from the floor.

ADJOURNMENT

The next meeting is scheduled for March 15th from 3:30 p.m. to 5:00 p.m. Staff will present the final Affordable Housing Plan.

Its business being completed, Commissioner Lopez moved to adjourn the meeting, second by Commissioner Padilla, the meeting adjourned at 4:00 p.m.

Councilor Renee Villarreal, Chair

Respectively submitted by:

Jo Ann G. Valdez, Stenographer

EXHIBIT
A

MINUTES OF THE

CITY OF SANTA FE

COMMUNITY DEVELOPMENT COMMISSION MEETING

Santa Fe, New Mexico
November 16, 2016

A meeting of the City of Santa Fe Community Development Commission was called to order by Councilor Renee Villarreal, Chair on this date at 3:30 p.m. at the Market Station Offices, 500 Market Street, Suite 200, Roundhouse Conference Room, Santa Fe, New Mexico.

Members Present:
Councilor Renee Villarreal, Chair
Rusty Tambascio, Vice Chair
Paul Goblet
Ken Hughes
John Padilla
Silas Peterson

Member(s) Absent:
Carla Lopez, excused

Staff Present:
Margaret Ambrosino, Senior Housing Planner
Alexandra Ladd, Special Projects Manager, Housing and Community Development Department

Others Present:
Zach Thomas, Santa Fe Community Housing Trust Development Director
Jo Ann G. Valdez, Stenographer

APPROVAL OF AGENDA

Commissioner Goblet moved to approve the Agenda as published. Commissioner Tambascio seconded the motion. The motion passed unanimously by voice vote.

APPROVAL OF MINUTES: September 14, 2016 CDC

Commissioner Tambascio moved to approve the Minutes of the September 14, 2016 CDC meeting as submitted. Commissioner Padilla seconded the motion. The motion passed unanimously by voice vote.

INDEX OF

CITY OF SANTA FE

COMMUNITY DEVELOPMENT COMMISSION

MEETING
November 16, 2016

ITEM	ACTION	PAGE (S)
CALL TO ORDER		
ROLL CALL	Quorum	1
APPROVAL OF AGENDA	Approved	1
APPROVAL OF MINUTES: September 14, 2016 CDC	Approved [as submitted]	2
DISCUSSION OF COMMUNITY DEVELOPMENT BLOCK GRANT AND AFFORDABLE HOUSING TRUST FUND PRIORITIES FOR 2017-2018 PROGRAM YEAR AND REVIEW OF REQUEST FOR PROPOSALS (RFP) SCORING CRITERIA TO BE UTILIZED BY THE COMMUNITY DEVELOPMENT COMMISSION (MARGARET AMBROSINO)	Discussion	2-6
ITEMS FROM THE COMMISSION		6-7
ITEMS FROM THE FLOOR	Motion passed approving Resolution	7-8
ADJOURNMENT	Adjourned at 5:03 p.m.	8

DISCUSSION OF COMMUNITY DEVELOPMENT BLOCK GRANT AND AFFORDABLE HOUSING TRUST FUND PRIORITIES FOR 2017-2018 PROGRAM YEAR AND REVIEW OF REQUEST FOR PROPOSALS (RFP) SCORING CRITERIA TO BE UTILIZED BY THE COMMUNITY DEVELOPMENT COMMISSION (MARGARET AMBROSINO)

(Copies of the Memo from Margaret Ambrosino, Senior Housing Planner to Community Development Commission dated November 10, 2016 were distributed in the Commissioners' packets. Copies of the Priority Needs as listed in the 2013-2017 Consolidated Plan and the Funding History from 2006-2016 are attached. A copy is hereby incorporated to these Minutes as Exhibit "A".)

Information/Background:

The CDBG funding priorities, as indicated by the community and put forth by the CDC for the past several years, have been weighted towards down payment assistance for first time home buyers and various public services administered by local non-profit organizations. The typical CDBG annual allocation of $400,000 after grant administration costs has traditionally been divided between approximately 10 projects to meet the highest priorities as identified in the City's 2013-2017 Consolidated Plan. These generally fall under (1) Housing (down payment assistance); (2) Public Facility Improvements (shelters); and (3) Public Services (various).

In addition to the anticipated $400,000 CDBG allocation for 2017, the City anticipates an allocation from the Affordable Housing Trust Fund of $400,000. In the administration of these funds, the Office of Affordable Housing will be required to move towards a Request for Proposals process in 2017 which will be aligned with the CDBG allocation process.

Past discussions amongst community leaders have expressed concerns on the need to boost rental housing and helping the homeless as representing the highest priorities. To best understand how funding could support this effort, the Office of Affordable Housing conducted research with local housing experts and service providers on determining how CDBG and AHTF funds can be leveraged to support these causes. Please see Exhibit "A" for the specifics on the findings.

Ms. Ambrosino said this is an opportunity for the Commission to check and review the funding history, review the priorities, and for staff to answer any questions the Commissioners may have.

Ms. Ambrosino introduced Zach Thomas, the Development Director of the Santa Fe Community Housing Trust.

She said the second part of her presentation that she would like to review with the Commission today are the findings and concerns from Housing Urban Development

(HUD). HUD monitored how the City is administering the Community Development Block Grant (CDBG) program in 2016, which had not been done in a few years. There were some findings and some concerns. A finding is something that is out of compliance and needs to be corrected; a concern is something that has to be addressed so that it does not turn into a finding from HUD later on in the future. One of the concerns was how the City notices these funding opportunities from year to year.

Ms. Ambrosino said there really was not any history as to why they were putting forth notice of funding opportunities, and not, as pointed out by HUD, going through the City's procurement process. Staff met with the Purchasing Division and decided that the best method to move forward and to avoid concerns and findings from HUD in the future, is to put these grants out as Request for Proposals. The Request for Proposals are still under review with the Purchasing Division and should be approved with some minor modifications this week. They have reviewed the scoring criteria and are satisfied with it.

Ms. Ambrosino noted that the Request for Proposals will be advertised on January 3, 2017 for both the Community Development Block Grant and the Affordable Housing Trust Fund. There will be one Technical Training meeting on January 17th for applicants to ask pre-application questions. Staff will review the applications/proposals to ensure that they meet the criteria and requirements. The responses to the Request for Proposal are due on February 2nd and the CDC will have their meeting on February 18th to discuss the proposals.

Questions/Comments:

Commissioner Tambascio asked if they are going to make the Technical Training mandatory.

Ms. Ladd said yes.

Commissioner Tambascio asked if the new process would cut down the time for applicants to respond.

Ms. Ambrosino said no, in fact it may add a little more time than the process in the past. She said in the meeting with Procurement, they advised them to model the RFPs off of the RFP process for the Children and Youth Commission.

Chair Villarreal asked if anybody had any questions about the funding history or the priority needs list.

Commissioner Goblet noted the Commission approved a fee-in-lieu request for a developer last year and asked he asked where this money would have gone. He asked if these would be additional funds that would be available.

Ms. Ladd said the fees collected are put into the Affordable Housing Trust Fund but they can only allocate funds that were received prior to the end of last fiscal year.

Commissioner Padilla thanked staff for the information they provided to the Commission. He said it is helpful to have the funding history, etc.

Commissioner Tambascio asked if the Commission will be going through the entire scoring sheet process.

Ms. Ambrosino said yes.

Chair Villarreal asked if there were any more questions before they move on to the Score Sheets.

Ms. Ladd asked if she could add one more thing - the Affordable Housing Trust Funds have been used for home repair and have been used to pilot the Rental Assistance Program.

Ms. Ambrosino briefly reviewed the Score Sheets noting that each Commissioner will score the proposals and staff will total the score sheets for each project.

She noted that they revised the application within the RFP so that it is clear for the applicants.

Chair Villarreal asked what gets funded by the CDBG funding versus what gets funding through the Affordable Housing Trust Fund.

Ms. Ladd explained that the Affordable Housing Trust Fund monies is regulated by the New Mexico Affordable Housing Act which is then reported to the MFA. It is only used for affordable housing, either capital costs, infrastructure, land or building costs (to support affordable housing). This is outlined in Chapter 26-3 of the City Code. CDBG monies can be used for public facilities, public services and other programs or services.

Chair Villarreal asked if there were any questions on the score sheets.

Score Sheets

Commissioner Hughes said this is familiar to him having worked with CDBG at the Department of Finance and Administration, especially the national objectives. The common being preventing slum and blight but the State's definition of blight is things that are unplanned or look inadequate; therefore, Santa Fe has a lot of blight. He said it would be interesting to see if the people who come in use this definition.

Commissioner Hughes said with regards to low to moderate income areas, does Santa Fe have census tracts that meets that.

Ms. Ambrosino said yes, there is one in particular, which is the Hopewell/Mann area and there may be more than one that the City has funded based on area benefit before.

Commissioner Peterson asked if the Commissioners will have a chance to compare the way each Commissioner has scored the projects and hear each other's opinions.

Ms. Ambrosino said yes.

Commissioner Peterson asked if the Commission will be able to adjust the level of funding requested like they have in the past.

Ms. Ambrosino said yes. She noted that she interviewed the Children and Youth Division and they have the flexibility to go above the amount requested, and she is not sure if she would agree with that.

Commissioner Tambascio added that the Commissioners will have an opportunity to review and compare the scores during the lunch break at the meeting in February when the Commission hears the presentations from the applicants.

Ms. Ambrosino said in the staff analysis that they provide, there is a sheet at the end which kind of sums up what the limits are for the grant. She sees the score sheet as the record and formality for purchasing purposes but it can be used as a working tool for the Commission.

Commissioner Goblet asked if the Commission will know at the February meeting how entities performed in the past year, relative to using the funding and if they are in compliance. He said to have performance information would be helpful.

Ms. Ambrosino said yes.

Chair Villarreal asked if there were any more questions on the score sheets or application. Seeing none, the Commission moved onto Funding Priorities.

Funding Priorities

Chair Villarreal said it would be helpful for City Council to see the Housing Strategic Plan so that they can see the needs in Santa Fe and how the Commission made the priority list. She would like to see the Plan go to City Council but she did not know the timeframe for this.

Ms. Ladd said the Plan will not go to Council before this but it will eventually go to City Council.

Commissioner Peterson said there are 10 high priority items and they can't all be highest priority.

Commissioner Goblet noted that the Commission has talked about rental housing and the supply of rental housing at several meetings and how is the Commission going to address this.

Commissioner Peterson thinks there could be a benefit for the Commission to emphasis what projects they are particularly interested in or what they want to focus on. For example, it could be projects that supply rental housing or low income rental housing units. He noted that the Priority Needs as listed in the 2013-2017 Consolidated Plan indicates that only 10% of the city's rental units have rents that are affordable for the low-income renter households.

Commissioner Padilla asked if copies of the 2013-2017 Consolidated Plan are available for applicants so that they can see the high priority areas.

Ms. Ambrosino said yes, the Consolidated Plan is referenced in the RFP and there is a link on the website where they can access this.

Commissioner Padilla did not think that the Commission needs to identify or specify a particularly area/projects that they want to focus on.

Commissioner Tambascio said the Commission could specify this in the Technical Training meeting.

Commissioner Padilla said applicants can attend the pre-proposal or Technical Training meeting to get specific information.

Commissioner Peterson said historically they have seen the same organizations requesting funding year after year and he would be interested in seeing other projects/organizations come in.

Chair Villarreal asked if staff sees non-profit organizations that work together on homelessness or housing related support.

Ms. Ladd said the continuum of care that is organized by the New Mexico Coalition to End Homelessness will organize projects but it is not usually for housing-related support projects.

Chair Villarreal asked if there were any more questions and there were none.

ITEMS FROM THE COMMISSION

Commissioner Hughes invited the Commissioners to a meeting/presentation that will be held at his office (at DFA) on December 9th. A representative from the Department of Energy will be in attendance and will talk about an initiative to provide solar for non-profit providers and homeowners with low-to-moderate income households. He will send an invitation or flier to the Commissioners.

One-Door Project/Homeless Campus

Chair Villarreal spoke about the One-Door Project/Homeless Campus effort noting

that there have been discussions on the idea of creating a homeless campus for Santa Fe and what they would look like. They have been doing research of other models across the country and there was one in San Antonio called "Haven of Hope". This is not just a shelter-it also integrates services and eventually provides permanent housing on some level on all different types of housing, as well as mental health and behavioral health services. Representatives came to Santa Fe and made a presentation on what they learned and what their challenges were. Workshops were done with direct service providers last week and there were good discussions about being more efficient on how we provide services in Santa Fe in the non-profit sector as it relates to homelessness.

Chair Villarreal said there are a lot of unknowns but the only way this could work is if there is land in the city or Santa Fe County and the northwest quadrant was looked at as a potential site but it is on the other side of Highway 599, so they would have to look at access, transportation, etc.

ITEMS FROM THE FLOOR

Resolution

[Copies of the Resolution *Contributing Property and Resources to Santa Fe Community Housing Trust for the Development of the Soleras Station Low Income Housing Tax Credit Project Pursuant to the Affordable Housing Act* were distributed. A copy is hereby incorporated to these Minutes as "Exhibit B".]

Ms. Ladd said the Resolution was approved by this Commission last year but the funding application from New Mexico Finance Authority has not been approved.

The Resolution states: "*The City will provide 10% of the development costs for a competitive Low Income Housing Tax Credit application for the Project by the Housing Trust as a direct grant to the Project subject to the terms of a land use regulatory agreement requiring an affordability period of 45 years running concurrently with requirements imposed by the New Mexico Finance Authority. The donation shall be granted subject to the terms of a land use regulatory agreement specifying the requirement for consistency with the Low Income Housing Tax Credit program requirements serving targeted low income clientele.*"

Mr. Thomas said the Board of the New Mexico Finance Authority has adopted some criteria changes and this would ultimately increase their score from last year. This positions then to be competitive to apply for the 9% tax credits.

Commissioner Peterson moved to approve the Resolution. Commissioner Goblet seconded the motion.

Ms. Ladd noted that the only piece missing with this Resolution is the Fiscal Impact Report.

Commissioner Tambascio said as long as staff is comfortable with the Resolution,

the Commission does not need to have the Resolution and the Fiscal Impact Report come back for approval.

Commissioner Padilla asked why the name of Soleras Station.

Mr. Thomas said Soleras Station is the name of the multi-family development.

Commissioner Padilla asked if the project is proposed to be LEED certified.

Mr. Thomas said yes.

The motion passed unanimously by voice vote.

ADJOURNMENT

Its business being completed, Commissioner Goblet moved to adjourn the meeting, second by Commissioner Tambascio, the meeting adjourned at 5:03 p.m.

Councilor Renee Villarreal, Chair

Respectively submitted by:

Jo Ann G. Valdez, Stenographer

App. 1-

CITY OF SANTA FE
COMMUNITY DEVELOPMENT BLOCK GRANT (CDBG)
PROPOSAL SCORE SHEET / Bid Number '17/22/RFP

Name of Applicant/Project: Housing Trust - DPA. (CDBG)

Amount Requested: $ 200K

Evaluation Criteria	Weighted Value	Evaluation Points 1 thru 5	Total Score	Max Score
Activity to be funded • Why needed? Does it address a gap? • Steps/phases to complete the activity • Who is served? • #s proposed to be served	20	X 4	80	100
National Objective Compliance • Benefits low/moderate income persons/households? • Prevents slum/blight • Does the activity serve residents Citywide or a Low to Moderate Income (LMI) Area (i.e. Census Tract)?	20	X 4	80	100
Consolidated Plan Compliance • Does the application demonstrate that it meets Consolidated Plan priorities?	10	X 4	40	50
Budget • Is proposed budget realistic? • Are other funding sources secured?	10	X 4	40	50
Performance Measurement/Work Plan • Are performance measurements, outcomes and proposed outcomes well presented? Realistic? Well-supported in the application? • Does the applicant have the administrative capacity to carry out the activity to be funded?	20	X 5	100	100
		Total Points	340	**400**

John A. Padilla — CDC Evaluator Name

Signature

2/14/17 — Date

CITY OF SANTA FE (CSF)
NON-DISCLOSURE AND CONFLICT OF INTEREST STATEMENT

REQUEST FOR PROPOSAL #'17/22/P

EVALUATOR NAME: John A. Padilla.

CSF policy is to prevent personal or organizational conflict of interest, or the appearance of such conflict of interest, in the award and administration of CSF contracts and Purchase Orders.

I, John A. Padilla., the undersigned, hereby certify that the following statements are true and correct and that I understand and agree to be bound by commitments contained herein.

I am acting at the request of CSF as a participant in the evaluation of *offers/ proposals* received in response to the *Request for Offers/ Request for Proposals,* entitled and/ or numbered I am acting of my own accord and not acting under duress. I am not currently employed by, nor am I receiving any compensation from, nor have I been the recipient of any present or future economic opportunity, employment, gift, loan, gratuity, special discount, trip, favor, or service in connection with any *offer/ proposal* or involved *Offeror/Proposer* in return for favorable consideration. I have no preconceived position on the relative merits of any of the *offers/ proposals* nor have I established a personal preference or position on the worth or standing of any *Offeror/ Proposer* participating in this action. CSF policy is to prevent personal or organizational conflict of interest, or the appearance of such conflict of interest, in the award and administration of CSF contracts, including, but not limited to contracts for professional services, agreements with consultants and Purchase Orders.

I hereby certify that to the best of my knowledge and belief, no conflict of interest exists that may diminish my capacity to perform an impartial, technically sound, objective review of this proposal(s) or otherwise result in a biased opinion or unfair competitive advantage.
I agree not to disclose or otherwise divulge any information pertaining to the contents, status, or ranking of any *offer/ proposal* to anyone other than the team leader or other evaluation team members. I understand the terms and "disclose or otherwise divulge" to include, but are not limited to, reproduction of any part or any portion of any *offer/ proposal,* or removal of same from designated areas without prior authorization from the evaluation team leader. I agree to perform any and all evaluations of said *offers/ proposals* in an unbiased manner, to the best of my ability, and with the best interest of CSF paramount in all decisions.
I agree to return to CSF Purchasing Department all copies of proposals, as well as any abstracts, upon completion of the evaluation.

2/14/17

SIGNATURE AND DATE:

*Affordable housing.
177 to 319K.

Banks are reaching out to them to get LMI income loans.

Cover Page

Diverse portfolio *

City of Santa Fe Community Development Block Grant Program FY 2017-2018	
Name of Nonprofit Organization:	Santa Fe Community Housing Trust
Name of Executive Director:	Sharron Welsh
Name of Board President:	Patricia Nie
Name, Contact Information (Address, Phone, and Email) of Person Submitting Request (Fiscal Agent if appropriate):	Denise Benavidez 1111 Agua Fria, Santa Fe, NM 87501 Phone: 505-989-3960, fax: 505-982-3690 email dbenavidez@housingtrustonline.org
Amount Requested:	$200,000
Program Name or Service being requested for Funding:	Revolving loan Fund for Down Payment Assistance

Brief Program or Service Description: CDBG funding provides vital down payment and closing cost assistance to low/ moderate income level home purchasers. Lack of down payment has been cited as endemic obstacles to home purchasing by this demographic. CDBG loans continue to be the primary/sole source of this greatly needed assistance. Recycled funds from payoffs are used for identical new loans.

Check which Category Describes your organization:

8. Private Non-Profit4
9. For Profit
10. Public Agency
11. Government Agency

DUNS or CAGE #	927532572
Business Registration #	16-00064129
Tax ID #	85-0392520
State CRS #	0217164908

Check One:
- ■ Previous Recipient
- ☐ New Applicant

Funding Categories to be Addressed (Circle one):
- ☐ Housing
- ☐ Public Facility
- ☐ Public Service

Project Proposal Summary
(If funded, the following will be written into the contract Scope of Services with Accomplishment Levels along with details provided in Section A)

Activity Name	CDBG Revolving Loan Fund Grant
Brief Summary of the activity	The Grant will fund down payment loans for home purchase for buyers earning <80% area median income that are secured by a second mortgage. These non-amortizing loans are zero-interest, due on sale, or refinance. Recipients must first complete an 8-hour class, develop a budget, a plan, and secure credit rating during one-on-one counseling. Loans are sized to assure financial sustainability with added consideration of income level, veteran status, and special needs. All loans are underwritten internally and presented for approval by our Loan Committee, made up of private bankers, Board members and the Executive Director.

Amount of CDBG funding requested for Activity	**$200,000**
Total budget of Activity	**$200,000**

To the best of my knowledge and belief, all data in this application is true and correct. If funded, I certify that the Applicant Organization is willing and able to adhere to the policies and procedures specified by the City of Santa Fe and all applicable program regulations of the US Department of Housing and Urban Development. Further, I understand there is not an agreement until the City of Santa Fe and the individual authorized to execute contracts on behalf of the Applicant Organization has signed the contract.

Sharron M Welsh	Executive Director	January 31, 2017
Authorized Signature *(sign in **blue** ink)*	Title	Date

CDBG funds can be used for specific Eligible Activities as outlined in the Overview. Select one type of Eligible Activity category that best describes your Project.

Type of Eligible Activity (check one)

Activities Related to Housing	4
Other Real Property Activities	
Public Facilities/Improvements	
Public Service	

Section A: Activity to be funded

The CDBG Revolving Loan Fund Grant will provide down payment assistance to low and moderate- income clients earning under 80% of the area median income. The loans provided are zero-interest, due on sale, transfer, or refinance. We require that potential homebuyers complete a comprehensive 8-hour training class in addition to one-on-one housing counseling. Loans are sized on need and affordability gap. All loans are underwritten for quality internally, with added consideration of factors such as percentage of AMI, family size, veteran, disability, and households currently residing in sub- standard housing. Loans are reviewed by our Loan Committee, which is made up of community members, bankers, and experienced senior staff. CDBG down payment assistance remains the only form of assistance to help low and moderate-income home buyers to purchase existing homes in the open market.

A1. Briefly describe the Activity you are requesting to fund with CDBG. This will help determine eligibility.

A2. Why is this Activity needed? Does it address a gap? Describe the degree of need, or the severity of a problem including cause, extent, location, frequency and duration that will be addressed by the project. Provide a description of service gaps the activity fills in the community. Additionally, supply data, such as demographics, reports and/or other information supporting your information and proving the need exists. **(Attach additional pages, if necessary)**

The City of Santa Fe Affordable Housing Plan, updated April 2016, projected a production goal of assisting 200 home purchases per year through training, counseling and down payment assistance. It notes that between 2011 and 2014 sale prices and values declined, incomes increased, and rents rose even faster. In short, renters gained purchasing power in the for-sale market while contending with additional competition for rentals. The 2012 Santa Fe Housing Needs Assessment survey also noted that 42 percent of renters plan on buying a home in Santa Fe – nineteen percent of the renters who responded to the survey cited lack of down payment funds as the biggest barrier to purchasing a home. Renters earning 60% to 80% AMI are especially squeezed since they cannot access more affordably priced rents in complexes created through federal tax credits. HUD has reported that nationwide, the average homeowner has 36 times the net worth of average renter. The Down payment *Assistance Grant will offer a means to stabilize monthly housing costs and broaden the ability to purchase for 10* to 20 low and moderate income home buyers to gain assets through home purchases.

A.3 If applicable, what steps or phases will be taken to complete the Activity (provision of services, engineering/design, advertising, bidding, contract award, construction, etc.)?
NOT APPLICABLE

A.4 Describe the population that the Activity will serve and how this population will be served. Describe the outreach and recruitment activities which will be conducted to make the proposed activity services known and accessible to the targeted population. Please include where these outreach and recruitment activities will take place.

The funds will assist individuals/families below 80% of area median income (low-moderate). The makeup of the 7 client households served in the 2015-2016 grant year were: 43% low 30-50% AMI, 57% moderate 50-80% AMI, 100% White/Hispanic, 75% female head of households, 0% disabled; Average income was 67.12% AMI or an average of $34,933. The outreach for our programs is conducted through multiple means and we generally have far more clients than resources to serve them. We invoiced $71,000 in the period 7/1/2016 to the present serving 5 clients and 15 household members with these funds and expect to expend the remainder before 6/30/2017. We have assisted more than 2600 families and we maintain numerous industry partners who continually refer new families to our programs. We actively utilize social media, posting 7/week on Facebook) and up to 30/week on Twitter (25% engagement increase in 2016), providing immediate interaction with our client base. We also periodically advertise and place PSAs in local publications, as well as prepare and distribute monthly electronic newsletters to approximately 500 recipients. Our counselors frequently participate in community fairs, visit local businesses, government entities, and other community groups to provide our partners and potential clients with information about our services. We also work with residents at our LIHTC multifamily housing communities to help prepare them for eventual home purchasing.

A.5 Estimate the number of total persons / households that will benefit from the CDBG funded portion of this Activity: (Fill in Households OR Persons depending on the type of Activity you are providing).

Total number of clients you anticipate serving:		
Households: **14**	**OR**	Persons:

A.6 Use the following Table 1 to break out the number of persons you anticipate serving at the low (30-50% AMI) and very low-income (< 30% AMI) levels and the type of client (Refer to overview of CDBG program for the most recent income amounts). Along with income, please anticipate the number of clients that are severely disabled adults, homeless persons, abused children, battered spouses, and illiterate adults, persons with AIDS, migrant farm workers, and elderly. (All of these clients fall under the presumed benefit categories as defined by CDBG and therefore, all under low or extremely low income). This would apply mainly to Public Service or Public Facilities/Improvements Activities.

Extremely Low Income (<30% AMI)	Low Income (31-50%)	Moderate Income 51-80%	Illiterate adults	Abused children	Severely Disabled Persons	Migrant Farm Workers	Elderly	Persons with AIDS	Homeless Persons
	4	10			1				

Table 1

A.7 Use the following Table 2 to breakout the number of households you anticipate serving at the income levels listed. (Refer to the 2016 AMI table on pg. 18 for the most recent income amounts). This would apply mainly to CDBG funding for housing projects such as Down Payment Assistance and Rehabilitation Activities.

Extremely Low Income (<30% AMI)	Low Income (31-50%)	Moderate Income (51-80%)	Non-low Moderate Income (81-100%)	Female Head of Household
	4	10		9

Table 2

A.8 CDBG funded construction activities must be in compliance with local land use plans and zoning. Explain how the proposed activity conforms to local plans and zoning ordinances. Provide a copy of the page(s) of resource document(s), pertinent sections, and page(s). This only applies to projects where the CDBG funds will used for the actual construction, not acquisition.

N/A

A.9 Please describe the organization in terms of its administrative capacity and its qualifying experience and length of experience with activities or projects similar to the proposed Activity. Include purpose, goals, programs, activities, clients, and accomplishments, if any, in the area of activity for which funding is requested. Give examples of and list experience.

The Santa Fe Community Housing Trust has effectively administered the CDBG Down Payment Assistance Revolving Loan Fund for more than 23 years. The Housing Trust has administered numerous federal and state grant programs and multi-million dollar construction projects. The organization is adept at contract administration, timeliness, and regulatory compliance. Under the direction of the Executive Director, the Housing Trust has two primary programs. The home buyer program is administered by Denise Benavidez, who has more than 35 years' experience in banking, lending, closing and loan operations. The development and asset management program is administered by Zach Thomas, who has 15 years in public and private sector experience overseeing land use and development activities. All financial tracking and funds availability data is overseen by the Controller Eric Westlake, who has more the 25 years' experience in managing financial operations, with a focus on non-profit organizations. , All of our housing counselors are nationally certified and partake in regular training. Reports detailing the availability of funds and client status are updated and provided to staff weekly. Our comprehensive database tool for tracking counseling and report generation is CounselorMax.

A.10 Briefly describe your organizations experience in government contract administration, and knowledge of federal regulations governing acquisition, procurement, equal employment opportunity, and labor standards.

The Housing Trust is a federally certified Community Financial Institution (CDFI), a Community Housing Development Organization (CHDO), A HUD-Approved Counseling Agency, and a prolific affordable housing developer.
The Housing Trust is fully competent at maintaining compliance and crosscutting federal regulations. Specifically, The Housing Trust administers the following federal grants which require compliance with the above regulations: HUD Housing Counseling Grant, Shelter + Care, the Low Income Housing Tax Credit (LIHTC) program, Housing Opportunities for People with Aids (HOPWA), Community Housing Development Organization (CHDO) funds and Previous Community Development Block Grants (CDBG) funds for both housing development and homebuyer assistance. The Housing Trust is audited regularly by the US Department of Housing and Urban Development (HUD) to establish compliance with federal crosscutting regulations.

B. National Objective Compliance

1. Benefits Low/ Moderate Income persons/households by:	
Area Benefit (eligible area) (LMA)	
Limited Clientele (LMC)	
Housing Activities (LMH)	X
Job Creation or Retention (LMJ)	

B.2 ***Is the service area city wide:*** *(X) yes ( ) no If* no, fill out B.3.

B.3 If an activity is based on an area benefit, identify the Census Tract(s) and Block Group(s) that will be served. Make sure to read the Overview for a clear understanding of the requirements of an area benefit. Attach a map of the area.

Census Tract	Block Group	Total Population	Low/Mod Income Population	% Low/ Mod Income
Total				

B.4 Explain fully how the proposed project meets the CDBG National Objective selected above. Provide substantiating documentation supporting the claims. Refer to Overview for more detail.

The project meets the National Objective of Benefit to Low and Moderate-Income Persons through its housing activities. The CDBG Down Payment Assistance Revolving Loan Fund qualifies as an eligible CDBG-funded housing activity by providing direct financial assistance to expand homeownership opportunities for low and moderate-income households as authorized by CDBG regulations at 24CFR 570.201 (n). The benefit to low and moderate-income families is based on service to a limited clientele, which is verified through income certification.

C. Consolidated Plan Compliance

The City of Santa Fe provides guidance in its 2013-2017 Consolidated Plan on funding uses, whether Federal, State, City, or Private. In accordance with federal regulations, each project must be consistent with the priorities outlined in the City's Consolidated Plan. (See Consolidated Plan on City website) Mark the **one priority** that the proposed project will meet.

P-25 Priority Needs

Check	Priority Need Name	Priority Level	Population Served	Goals Addressed
	Rental Vouchers	High	Extremely low-income renters; people at risk of being homeless; persons with disabilities; homeless youth; veterans; elderly; *families in transition;* persons with HIV/AIDS and their families; public housing residents; mentally ill; chronic substance abusers; victims of domestic violence	Reduced rate of cost burden and corresponding drop in poverty rate for homeless households and those in danger of becoming homeless. *(Increase Opportunities for At Risk Populations);* Inventory of rental units and vouchers expanded to meet increased demand *(Increase Affordable Housing Opportunities)*
	Emergency Shelter (note could be classified as Public Service which is restricted in allocation amount)	High	Extremely low-income residents; chronic homeless; homeless youth; veterans; families in transition; mentally ill; chronic substance abusers; victims of domestic violence	Reduced rate of cost burden and corresponding drop in poverty rate for homeless households and those in danger of becoming homeless. *(Increase Opportunities for At Risk Populations)*
	Support Services for Homeless or People at Risk of Homelessness (note could be classified as Public Service which is restricted in allocation amount)	High	Extremely low-income renters; people at risk of being homeless; persons with disabilities; homeless youth; veterans; elderly; families in transition; persons with HIV/AIDS and their families; public housing residents; mentally ill; chronic substance abusers; victims of domestic violence	Reduced rate of cost burden and corresponding drop in poverty rate for homeless households and those in danger of becoming homeless. *(Increase Opportunities for At Risk Populations)*
	Refinancing Services and Support for Current Homeowners	High	Low-income homeowners; homeowners in risk of foreclosure; homeowners in substandard housing	Reduced rate of cost burden and corresponding drop in poverty rate for homeless households and those in danger of becoming homeless. *(Increase Opportunities for At Risk Populations);* Increased homeownership opportunities and support for long term affordability and accessibility for current homeowners. *(Increase Affordable Housing Opportunities)*

Priority Needs (cont.)

Check	Priority Need Name	Priority Level	Population Served	Goals Addressed
	Homeowner Rehabilitation Programs, Energy-efficiency Upgrades, Accessibility Retrofits	High	Low- and moderate-income homeowners; residents in redeveloping or transitioning neighborhoods; homeowners living in aging or substandard housing stock; seniors who need to "age in place;" people with disabilities	Increased homeownership opportunities and support for long term affordability and accessibility for current Homeowners. *(Increase Affordable Housing Opportunities);* Housing opportunities reflect emerging needs, changing demographics and are aligned with redevelopment projects, economic development objectives and sustainability goals *(Address Emerging and Current Needs and Changing Demographics)*
	Construction of affordably-priced homes for homeownership	Low	Low- and moderate-income homebuyers and current renters; local workforce	Increased homeownership opportunities and support for long term affordability and accessibility for current Homeowners. *(Increase Affordable Housing Opportunities)*
	Fair Housing Outreach	High	Low- and moderate-income renters; low-income landlords; persons with disabilities; Spanish speakers; large families; general public	Housing opportunities reflect emerging needs, changing demographics and are aligned with redevelopment projects, economic development objectives and sustainability goals *(Address Emerging and Current Needs and changing Demographics)*
	Diversity of Housing Types	Low	Low- and moderate-income renters; seniors; small households; entrepreneurs; aging veterans; entrepreneurs and other self-employed	Housing opportunities reflect emerging needs, changing demographics and are aligned with redevelopment projects, economic development objectives and sustainability goals *(Address Emerging and Current Needs and Changing Demographics)*
	Non-Housing Community Facilities and Services	High	Low- and moderate-income residents; residents in redeveloping or transitioning neighborhoods; youth	Housing opportunities reflect emerging needs, changing demographics and are aligned with redevelopment projects, economic development objectives and sustainability goals *(Address Emerging and Current Needs and Changing Demographics)*

Priority Needs (cont.)

Check	Priority Need Name	Priority Level	Population Served	Goals Addressed
	Provision of Rental Units and Support Services for LI/ VLI Renters	High	Low- and very low-income renters; persons transitioning out of homelessness; renters in need of support services; public housing residents	Inventory of rental units and vouchers expanded to meet increased demand *(Increase Affordable Housing Opportunities);* Housing opportunities *reflect emerging needs, changing* demographics and are aligned with redevelopment projects, economic development objectives and sustainability goals *(Address Emerging and Current Needs and Changing Demographics)*
	Rental Rehabilitation	*Low*	*Low- and moderate-*income renters; low-income landlords; residents of low- income neighborhoods that are redeveloping or in transition; public housing residents	*Inventory of rental units and vouchers* expanded to meet increased demand *(Increase Affordable Housing Opportunities);* Housing opportunities reflect emerging needs, changing demographics and are aligned with redevelopment projects, economic development objectives and sustainability goals *(Address Emerging and Current Needs and Changing Demographics)*
X	Down Payment Assistance	High	Low- and moderate-income residents who are "buyer ready"; first responders (fire, police, etc.)	Increased homeownership opportunities and support for long term affordability and accessibility for current homeowners. *(Increase Affordable Housing Opportunities)*
	Homebuyer Training & Counseling	High	Low- and moderate-income homebuyers; current renters	Increased homeownership opportunities and support for long term affordability and accessibility for current homeowners. *(Increase Affordable Housing Opportunities)*

D. Budget

D1. Describe the Proposed Budget for this Activity. Please explain all budgeted expenses including contractual services, personnel services, commodities, and capital outlay. Also explain what the CDBG funds will be used for. Also explain the effect of not receiving any or only a portion of a CDBG allocation has on the project budget.

The CDBG funding allocation received will be used exclusively for down payment assistance to our target market in the form of funds disbursed in the home buying process. All other program related activities and staff time are paid for outside of this grant. The requested allocation of $200,000.00 is anticipated to provide funding for 10-15 households, benefitting 20-45 household members with the maximum subsidy amount of $20,000.00 per household. A decrease in the funding amount would in effect decrease the number of individuals/households who would receive assistance.

D.2 Please complete the following table to identify the funding sources and amounts. Indicate total project cost that incorporates the total CDBG request and what funds or services, if any, the sponsor and/or other agencies will contribute. Also enter other ***committed*** funding sources (committed funds are funds available or will be available to fund the Activity during the CDBG Fiscal Year). Please be as accurate as possible. Should your organization be awarded funding, a revised budget (as needed) will become an Addendum to the CDBG Contract.

Type of funding	Source/ amount	Source/ amount	Source/ amount	Totals
Requested CDBG amount				$200,000
Other HUD funds i.e. HOME, Section 108				$
Other Federal Funds				$
City Funding i.e. Youth and Family, Human Services				$
State funding, i.e. MFA				$
Other i.e. in- kind, private funds				$

Total of all funding sources		**$200,000**

D.3 If you are proposing to utilize CDBG funds to pay for staff costs, please list each position title and the percentage of their salary and benefits that will be funded by CDBG. Depending on the Activity, listing this information does not guarantee the position will be funded by CDBG as it may not be eligible.

PERSONNEL Position Title	**New (Y/N)**	**% salary & benefits paid for with CDBG**
N/A		

E. Performance Measurement System/Work Plan

CDBG/ Work Plan - FY 2017-2018

Provide the performance measurement goals, objectives and outcomes for your proposed CDBG project. Please refer to Exhibit B at the end of this document. Based on these measurements, attach a Work Plan that describes the goals, objectives and outcomes in greater detail and be:

(B) Specific
(C) Measurable
(D) Achievable
(E) Results-orientated
(F) Time bound

F. Submittal Requirements: Required Attachments

Please attach one (1) unbound copy of the following items <u>in the following order:</u>

X___Transmittal Letter

X___On your organization's letterhead, prepare a brief letter outlining the following:
- A brief summary of your proposed project;
- Funding amount requested; and
- Name, telephone number and address of a contact person(s)

X___Board of Directors' Authorization to Request Funds

X___Work Plan (as noted above)

X___Certificate of Non-profit Incorporation

X___IRS documentation showing qualification as a nonprofit corporation under Section 501(c) (3), and most recently submitted Federal Tax Return (Form 990 or 990EZ) or other financial statement.

X___Organization Chart

X___Copy of Agency's most Recent Independent Audit

X___Agency's accounting and procurement policies

X___Confidentiality and

CITY OF SANTA FE
AFFORDABLE HOUSING TRUST FUND (AHTF)
PROPOSAL SCORE SHEET / Bid Number '17/TBD/RFP

Name of Applicant/Project: Housing Trust DPA – (AHTF.)
Amount Requested: $ 75K

CRITERIA	Weighted Value	Evaluation Points (1-5)	Total Points	Max. Score
Funding • Leverage amounts from other sources • Operating budget shows evidence of sufficient revenue to administer the proposed program • Secured matching resources	20%	4	80	100
Need/Benefit & Project Feasibility Data driven analysis that shows: • The proposal is responsive to current and future market demand • Income mix, if applicable • Site control • Realistic time frame for completion of funded project/program activities	40%	5	200	200
Affordability • The proposal meets the Affordability Requirements serving households of up to 120% AMI	20%	4	80	100
Demonstrated Capability – Organizational Management • Staff • Organizational Experience • *Expertise in* type(s) of housing or service(s) proposed • Demonstrated Financial Soundness	20%	5	100	100
TOTAL	100%		460	500

EVALUATION POINTS: 1 -- Lowest 5 – Highest

02/14/17

CDC Evaluator Name Signature Date

CITY OF SANTA FE (CSF)
NON-DISCLOSURE AND CONFLICT OF INTEREST STATEMENT

REQUEST FOR PROPOSAL #'17/22/P

EVALUATOR NAME: John D. Padilla

CSF policy is to prevent personal or organizational conflict of interest, or the appearance of such conflict of interest, in the award and administration of CSF contracts and Purchase Orders.

I, John D. Padilla, the undersigned, hereby certify that the following statements are true and correct and that I understand and agree to be bound by commitments contained herein.

I am acting at the request of CSF as a participant in the evaluation of *offers/ proposals* received in response to the *Request for Offers/ Request for Proposals,* entitled and/ or numbered I am acting of my own accord and not acting under duress. I am not currently employed by, nor am I receiving any compensation from, nor have I been the recipient of any present or future economic opportunity, employment, gift, loan, gratuity, special discount, trip, favor, or service in connection with any *offer/ proposal* or involved *Offeror/Proposer* in return for favorable consideration. I have no preconceived position on the relative merits of any of the *offers/ proposals* nor have I established a personal preference or position on the worth or standing of any *Offeror/ Proposer* participating in this action. CSF policy is to prevent personal or organizational conflict of interest, or the appearance of such conflict of interest, in the award and administration of CSF contracts, including, but not limited to contracts for professional services, agreements with consultants and Purchase Orders.

I hereby certify that to the best of my knowledge and belief, no conflict of interest exists that may diminish my capacity to perform an impartial, technically sound, objective review of this proposal(s) or otherwise result in a biased opinion or unfair competitive advantage.
I agree not to disclose or otherwise divulge any information pertaining to the contents, status, or ranking of any *offer/ proposal* to anyone other than the team leader or other evaluation team members. I understand the terms and "disclose or otherwise divulge" to include, but are not limited to, reproduction of any part or any portion of any *offer/ proposal,* or removal of same from designated areas without prior authorization from the evaluation team leader. I agree to perform any and all evaluations of said *offers/ proposals* in an unbiased manner, to the best of my ability, and with the best interest of CSF paramount in all decisions.
I agree to return to CSF Purchasing Department all copies of proposals, as well as any abstracts, upon completion of the evaluation.

02/14/17

SIGNATURE AND DATE:

2017-2018 AHTF APPLICATION

General Information

Applicant Name(s): The Housing Trust

Address: 1111 Agua Fria

Santa Fe, NM 87501

Federal Tax ID # 85-0392520

City Business Reg. #: 16-00064129

CRS#: 0217164908

City/State/Zip Code: Santa Fe, NM 87504-0713

Telephone: 505-989-3960

Project Contact: Sharron Welsh/Denise Benavidez/

Email Address: swelsh@housingtrustonline.org

Amount of Allocation Requested: $ $75,000

Type of Applicant:

☐ Partnership ☐ Corporation ■ Non-Profit* ☐ Other

* Non-profit must provide proof of non-profit status. This proof includes submittal of current registration as charitable organization with the NM Attorney General's Office, covering the most recent Fiscal Year, or proof of exemption. Information can be obtained online at https://secure.nmag.gov/coros/. Verification should be in the form of the first page of the "NM Charitable Organization Statement."

Project Name: Arroyo Central Workforce Down Payment Assistance

Project Address (if applicable): NA

City/State/Zip Code: Santa Fe, NM

Priority Project

Select one of the categories your project falls under:

☐ **Rental Vouchers** - Provide supported rental vouchers (includes access to counseling, health services, case management, and other services) to renters earning less than 50%AMI;

☐ **Emergency Shelters including permanent supported shelter housing** - Development, construction, and preservation of shelter/permanent supported rental facilities, including infrastructure improvements;

☐ **Provision of Rental Units and Support Services for Low Income (up to 50% AMI) and Extremely Low Income Renters (less than 30% AMI)** - Acquisition, conversion, preservation and new construction of tiered income multi-family rental properties; including infrastructure or one-time emergency rental assistance;

■ **Down payment Assistance/Increase of Ownership Opportunities** - Down payment assistance in the form of soft-second mortgage that "buys down" principal amount of loan to lower monthly payment; Acquisition, conversion, preservation and new construction of homeownership housing;

☐ **Homeowner Rehabilitation Programs, Energy Efficiency Upgrades, *Accessibility Retrofits*** - *Aacquisition, conversion, and preservation of affordable* housing that accommodates needs of current householders.

Project Description:

Please provide a narrative of your project. Specifically who will be served, anticipated outcomes, etc. (If needed continue on a separate sheet)

The funds would enable the purchase of 5 homes by households earning from 80% to 120% of AMI in the Arroyo Central subdivision in Tierra Contenta. In all other respects it will work exactly the same as the Housing Trust's AHTF workforce Housing Proposal submitted simultaneously. To date the Housing Trust has funded $20,000 in downpayment assistance for a veteran with a disability in addition to $60,000 of MI$aver amortizing, second mortgage loans which eliminates the need to pay for mortgage insurance.

Downpayment assistance in the amount of $75,000 can help at least 5 working households to get the foothold that will help to anchor them in Santa Fe while maintaining predictable and sustainable monthly housing costs. Several thousand of Santa Fe's working households have been assisted in this manner since the Housing Trust started its home buyer assistance programs in 1992. Outside sources such as HOME funds through NMMFA are at historic lows at this time due to state and federal "belt tightening" since the national

subprime mortgage crisis of 2007-2009.

Some of the funds distributed through the Affordable Housing Trust fund can be sourced back to the Housing Trust (resales of Eldergrace/Sand River units) and its affiliate, the Tierra Contenta Corporation. The original source of funds for the Eldergrace Project was Housing Trust's own funds as the developer under the HOMES program. Both organizations are currently challenged for sufficient resources to carry out the activities that would replenish the supply.

1. Funding:

How will the AHTF allocation be used for this project? What additional funding sources are secured or will be secured upon receipt of allocation? The City of Santa Fe requires financing from other sources to be committed prior to the release of funds from the AHTF.

The down payment assistance loans would supplement the home purchasers' own funds and other sources needed for down payment on a modest home. AHTF funds used for zero interest, nonamortizing, thirty year loans that is repaid at sale or refinance and is capped at $20,000 per transaction allocated in the minimum amount necessary to secure prime first mortgage loans. At Arroyo Central we anticipate an average loan of $15,000. The client's eligibility is verified and the income certified by our staff. All transactions are underwritten and reviewed by an outside Loan Committee populated by volunteer mortgage lending professionals. All sources of funds are substantiated prior to loan committee review. When the first mortgage lender signals readiness to fund, the AHTF loan funds are deposited with the title company until all sources are in place to close the transaction. The Housing Trust maintains sufficient liquidity and credit to assure that it can front costs for reimburseable grant expenses to assure timely transactions.

The Housing Trust supplements the subsidies with its MI$aver program. Purchasers can borrow up to 20% of the purchase price in the form of an amortizing, interest bearing second mortgage with an interest rate at or below that on the first mortgage. The Housing Trust was granted $1,000,000 in for that purpose (out which about 25% is remaining. When reservations exceeded the funds available in December, 2016, the Board of Directors allocated an additional $500,000 from other sources to cover the needs anticipated in 2017. All of these funds are in hand.

Leveraging/Matching Requirement:

$3 to $1 Leveraging: for every $1 allocated through the AHTF, at least $3 from other sources will be expected (leveraged funds can include long term mortgages, other sources of grants, owner equity, proceeds from Low Income Housing Tax Credits, or the current value of land); organizational resources should be used to provide $1 of match (See Exhibit A for example)

Briefly Describe:

The typical transaction consists of $6,900 of client funds, $15,000 of AHTF funds, $21,000 of MI$aver funds and a conventional first mortgage of $170,000. This yields a 16.76:1 leveraging ratio on average with a Housing Trust fund match of at least 2.27:1 but likely to average 4:1 based on lending guidelines that offer a below market rate on the Mi$aver funds that are capped at $60,000. Additionally, the Housing Trust provides housing counseling and home purchase training classes for each client funded by a variety of other sources, including the city's general funds, HUD's Housing Counseling funds through intermediary sources, occasional funds from MFA and fees collected. Homebuyers in the subdivision will receive one on one home maintenance training from a licensed building contractor and each buyer will participate in sustainable landscape classes at the subdivision led by noted Landscape Architect, Solange Serquis.

Project Budget and/or Development Pro-Forma: demonstrate use of leveraged and matching funds as well as evidence that operating budget is sufficient to administer the proposed program/project (please attach documents as well as give brief overview

below) See attached budget and leverage calculation

2.Need/Benefit & Project Feasibility:

Demonstrate, using data-based analysis, that there is a clear connection between the proposed project/program and adopted Priority(s), and evidence that the proposed project/program meets current and future market demands. Provide narrative below (use additional sheets as necessary):

According to mortgage giant, Freddie Mac, "the average down payment for single-family homes bought in the first quarter of this year (2016) was 14.8 percent." While the median price in Santa Fe is far out of reach for the the typical first time home purchaser, the median sales price paid by our clients in 2016 was $212,800. They put down $6,900 and paid an additional $4000 to $6000 of transaction costs out of their own pockets which totals over $11,000 (excluding any down payment assistance.) Without down payment assistance, the typical client would have to put down $25,000 and pay closing costs for a total of around $31,000. While Santa Fe's up and coming young consumers are a tenacious lot who met the challenge of an $11,000 nest egg needed for purchase, they are also savvy enough to move away if the housing cost burden exceeds the benefits of living and working in Santa Fe.

Likewise the Housing Trust carefully underwrites every transaction in order to provide the minimum assistance needed to enable the buyer to close on a home at a payment they can sustain while assisting as many buyers as possible. The transaction is made affordable in many cases through The Housing Trust's MI$aver program. In 2016, the Housing Trust provided $451,000 under the MI$aver program in the form of second mortgages that are amortizing and interest bearing at rates at or below the rate on the first mortgages. The amortizing seconds don't reduce the loan payments by much, but rather they eliminate the cost of Mortgage Insurance and premiums which afford substantial savings. Repaid funds are recycled by the Housing Trust for new down payment loans. In this way, the AHTF and CDBG funds have maximum impact with a very effective benefit to consumer and high efficiency level for the grantors.

What is the timeline for the project?

18months. July 1, 2017 to December 31, 2018

Site Information (if applicable) Not Applicable

If your proposed project include acquisition, conversion, preservation and new construction of homeownership or rental housing, please provide the following information.

Site control is or will be in the form of*: ☐ Deed ☐ Option

☐ Lease (Term_____Years) ☐ Purchase Contract ☐ Other (explain)

Note: Site details are attached for information, but the proposal is for post construction workforce housing second mortgage loans to purchasers.

* If project is recommended for funding, proof of site control must be provided before funds are disbursed.

Expiration Date of Contract, Option, or Lease_____(month/year)

Site Description:

Area of Site:_____acres or_____square feet

Is site zoned for your development? ☐ Yes ☐ No Zoning_____

If no, is site currently in the process of re-zoning?

☐ Yes ☐ No Re-Zoning_____

When is zoning issue to be resolved?_____(month/year)

Has the City approved the site plan and/or plat? ☐ Yes ☐ No

If yes, provide a copy of the site plan/plat.

Are there any other development reviews and approvals required? ☐ Yes ☐ No

If yes, explain:

_____

_____

_____

_____

List any required reports or studies underway or completed such as soils report, environmental assessment, traffic study)

_____

_____

_____

_____

Has the City issued the building permit? Yes No

Are all utilities presently available to the site? ☐ Yes ☐ No

If no, which utilities need to be brought to the site? _____

Who has responsibility of bringing utilities to site? _____

3.Affordability:

Outline the affordability time period for this project based on the following: (i.e. loans to *$14,999 – 5 years, $15,000 to $40,000 – 10 years, 40,001-$100,000 – 15 years and* over $100,000 – 20 years)

N/A

_____

_____

4.Demonstrated Capability - Organizational Capacity

Describe the expertise of your organization and past projects to provide the type of housing or programs proposed for funding:

The Santa Fe Community Housing Trust has in its 24+ year history provided homeownership counseling and training and managed its down payment assistance program in conjunction with the City of Santa Fe and New Mexico Mortgage Finance Authority. We have effectively administered the CDBG Down Payment Assistance Revolving Loan Fund for more than 22 years and acted as the administrator for numerous large federal and state grant programs, including HOPWA, Shelter + Care, and MFA CHDO and LIHTC, demonstrating regulatory compliance and timely reporting. Our Controller holds a Masters Degree in Business Administration and has *more than 25 years in financial management. All financial tracking and fund availability data is under his* control. Our home buyer program manager has more than 35 years banking and lending experience. We utilize CounselorMax, the database that allows management of client information in tracking status for reporting.

Describe your staffing and attach resumes of key personnel: Our Controller maintains all financial tracking and funds availability data. The home buyer program manager has more than 35 years experience in banking, mortgage lending, underwriting, loan operations and closings. She will administer applications for assistance and eventual loan payoff. Our three Housing Counselors are nationally certified with 27 years of combined experience in assisting homebuyers.

Demonstrate Financial Soundness. Please submit the following documentation:

- Audited Financial Statements for 2015 and 2014.
- Current Statement of Assets & Liability

SUBMITTAL REQUIREMENTS

Please attach one (1) unbound copy of the following items in the following order:

_____Audited Financial Statements for 2015 and 2014

_____Current statement of Assets & Liability

_____Project budget

_____Leverage calculations

_____List of current board members

_____Fiscal Policies and Procedures

_____*Letter of compliance demonstrating cleared findings; or progress towards clearing* findings

THE HOUSING TRUST

City of Santa Fe Affordable Housing Trust FY 2017-2018

Project Budget & Leverage

HOMEBUYERS SERVED BY PROJECT 5

USE OF FUNDS	Per Home	Project
Average Client Home Sale Price	$ 245,000	$ 1,225,000
Closing Costs (2.6%)	6,370	31,850
Total Transaction	*$ 251,370*	*$ 1,256,850*

SOURCE OF FUNDS	Per Home	Project
First Mortgage	$ 193,740	$ 968,700
AHTF Down Payment Assistance	15,000	75,000
MI$aver Loan (amortizing at 4% interest)	*34,055*	*170,275*
Buyer Cash (3.5%)	8,575	42,875
Total Funding Sources	$ 251,370	$ 1,256,850

PROJECT LEVERAGE	Amount	Leverage and Match
AHTF Grant Request	$ 75,000	
Total Leveraging Funds	$ 1,011,575	$13.49:1
Total Subrecipient Match	170,275	$2.27:1

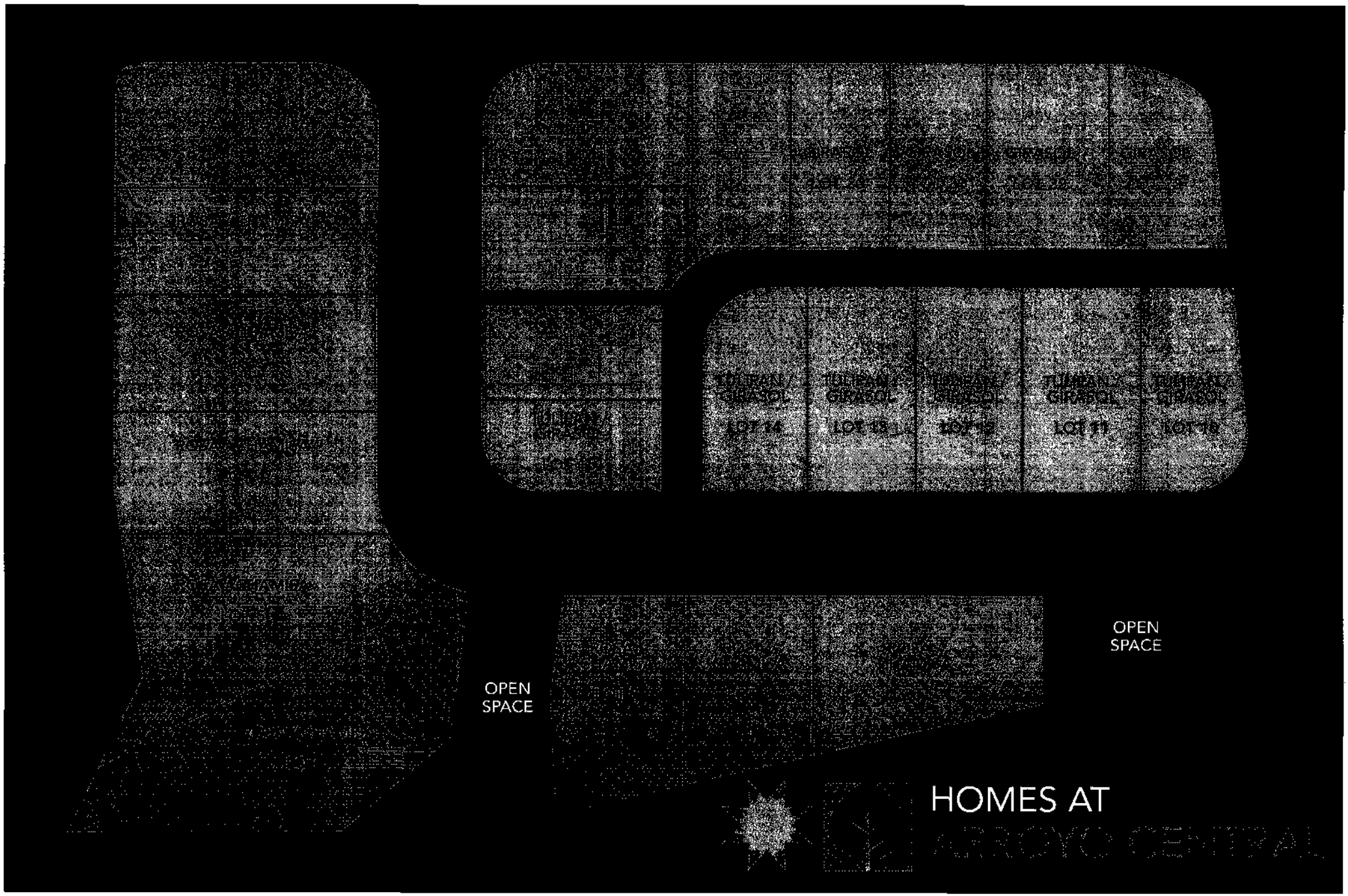
HOMES AT ARROYO CENTRAL

ARROYO CENTRAL HOMES, PRICES THROUGH JANUARY 2017

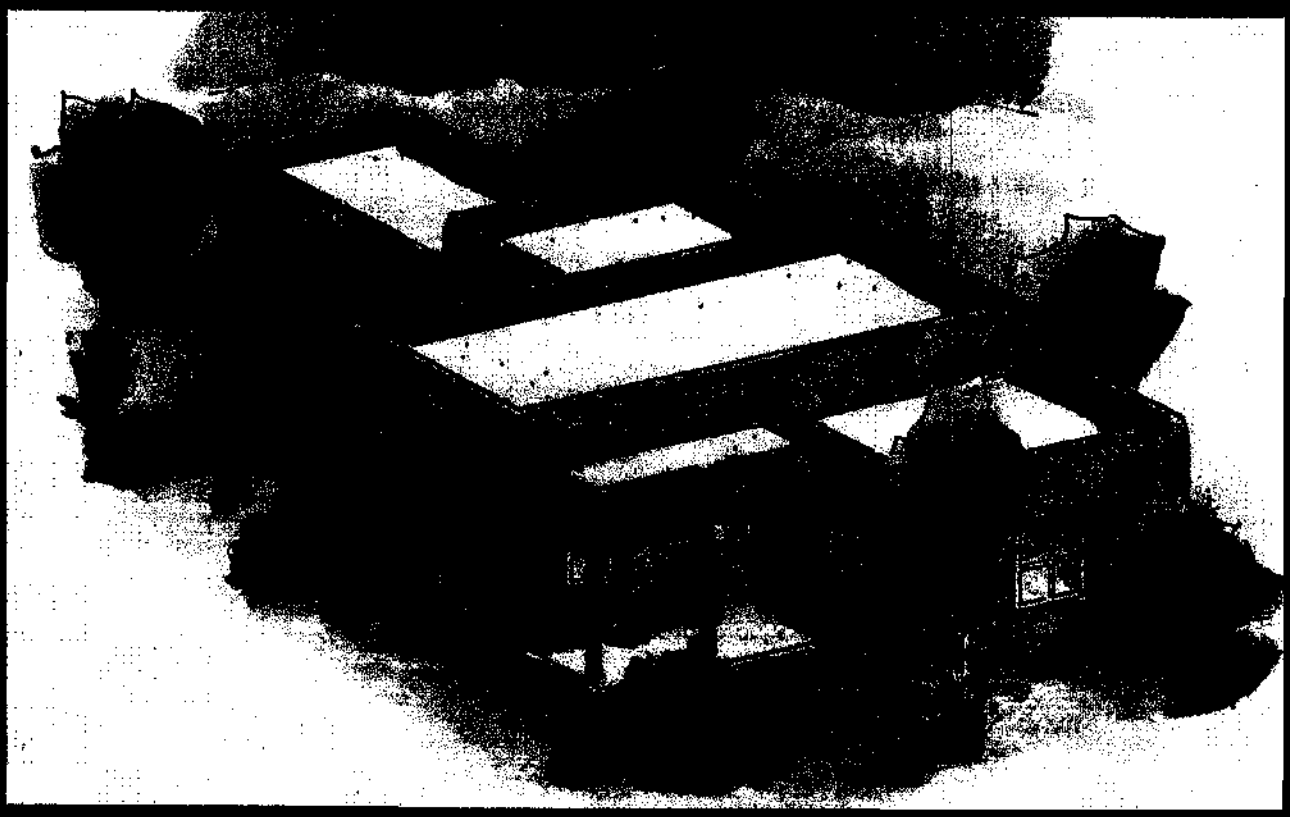
		FLOOR PLAN	SQ. FOOTAGE	LOT SIZE	BASE
7240 Arroyo Central	1	Rosa/Chamisa**	1605/1809	5779	Pending
7244 Arroyo Central	2	Rosa/Chamisa**	1605/1809	5412	$262,900/$277,900
7248 Arroyo Central	3	Rosa/Chamisa**	1605/1809	5413	$262,900/$277,900
7252 Arroyo Central	4	Rosa/Chamisa**	1605/1809	5804	$270,500 large lot
7256 Arroyo Central	5	Rosa/Chamisa**	1605/1809	8628	$262,900/$273,900 large lot
7260 Arroyo Central	6	Rosa/Chamisa**	1605/1809	11228	$264,900/$276,900 large lot
7266 Arroyo Central	7	Rosa/Chamisa**	1605/1809	5948	$260,900/$275,900 large lot
7270 Arroyo Central	8	Rosa/Chamisa**	1605/1809	4274	Pending
7274 Arroyo Central	9	Lot for sale		5936	Lot for sale
7279 Arroyo Central	10	Tulipan/Girasol	1352/1340	5182	$244,900/$242,900
7277 Arroyo Central	11	Tulipan/Girasol	1352/1340	4732	$244,900/$242,900
7276 Arroyo Central	12	Tulipan/Girasol	1352/1340	4732	$244,900/$242,900
7271 Arroyo Central	13	Tulipan/Girasol	1352/1340	4732	$244,900/$242,900
7265 Arroyo Central	14	Tulipan/Girasol	1352/1340	5241	$244,900/$242,900
7253 Arroyo Central	15	Tulipan/Girasol	1352/1340	5249	Pending
7249 Arroyo Central	16	Tulipan	1352 4493		SOLD
7245 Arroyo Central	17	Chamisa	1809	6640	$279,700
7241 Arroyo Central	18	Rosa	1605	5397	$274,900
7146 Plaza Central	19	Girasol	1352	4974	$244,900/$242,900
7142 Plaza Central	20	Tulipan/Girasol	1352/1340	4732	$247,500
7138 Plaza Central	21	Tulipan/Girasol	1352/1340	4732	$244,900/$242,900
7134 Plaza Central	22	Tulipan/Girasol	1352/1340	4732	$244,900/$242,900
7130 Plaza Central	23	Tulipan/Girasol	1352/1340	4732	$245,900/$243,900

* Unstarted houses allow buyer selection between 2 models ** Chamisa has 4 bedrooms Prices subject to change.

For more information call James Hicks or Sharron Welsh at (505) 989-3960


TULIPAN / GIRASOL
LOT 14
TULIPAN / GIRASOL
LOT 13
TULIPAN / GIRASOL
LOT 12
TULIPAN / GIRASOL
LOT 11
TULIPAN / GIRASOL
LOT 10
OPEN SPACE
OPEN SPACE
HOMES AT

HOMES AT ARROYO CENTRAL



Tulipan

1352 sq. ft.

Home Features:

- 3 Bedroom
- 2 Bath
- Oversized 2 Car Garage
- Air Conditioning
- Covered Front Portal

Upgrade Options:

- Concrete Patio
- Patio Cover
- High Ceilings with Vigas
- Granite Counter Tops in Kitchen
- Vinyl Wood Grain Flooring or Tile Flooring in Living Room

THE HOUSING TRUST
Our Help Your Home

Contact:
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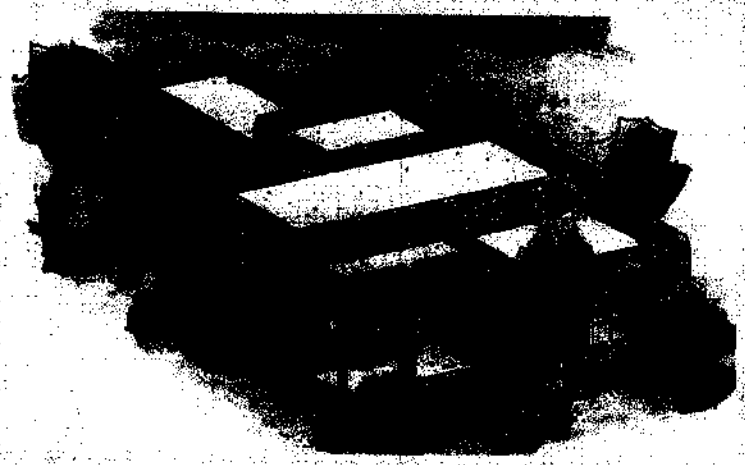
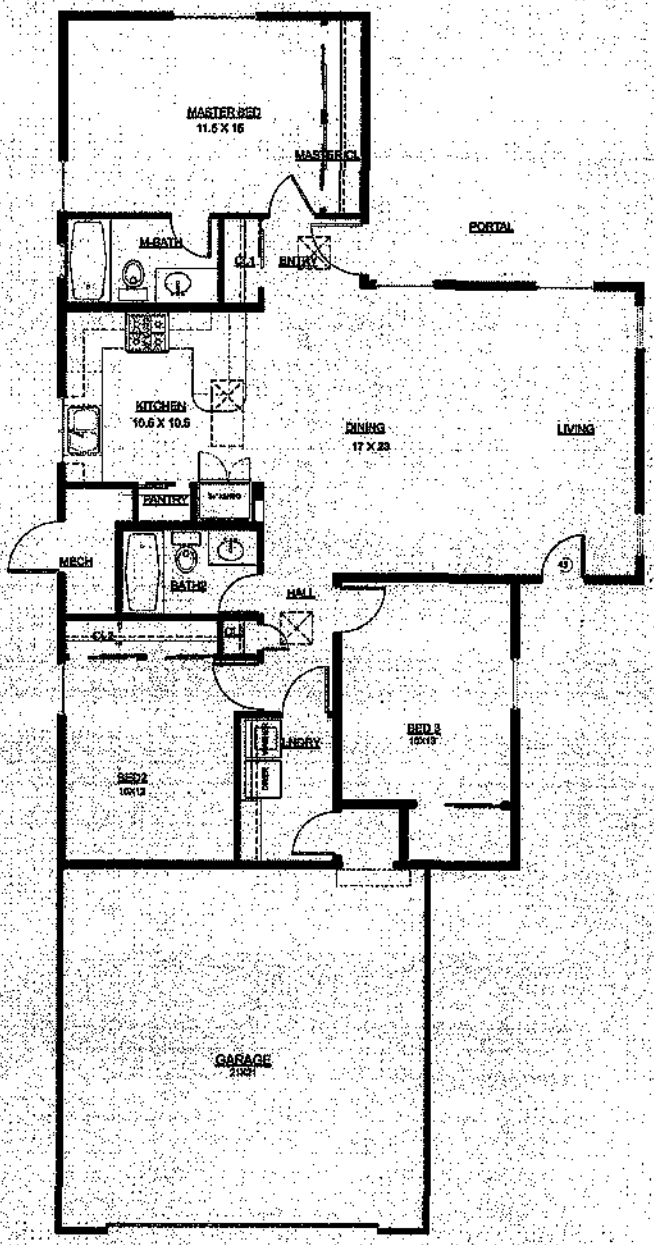
Tulipan

1352 sq. ft.



Floorplan

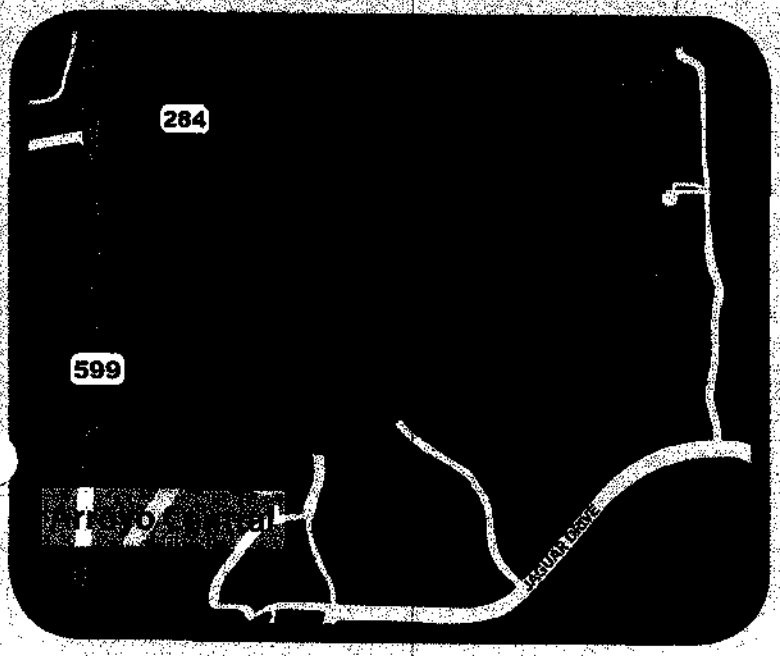


Community Features:

- Near SWAN Regional Park (Southwest Activity Node)
- Close to Southside Library
- Near the new Nina Otero K-8

Directions: I-25 to 599 exit, turn right onto Airport Road, take a right onto Paseo Del Sol W, then take a right onto Plaza Central.

Take Cerrillos south towards I-25, take a right onto Airport road, go past Santa Fe Country Club and take a left onto Paseo Del Sol W, then take a right onto Plaza Central.



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HOMES AT ARROYO CENTRAL

Girasol

1,340 sq. ft.

Home Features:

- 3 Bedroom
- 2 Bath
- 2 Car Garage
- Air Conditioning
- Covered Front Portal

Upgrade Options:

- Concrete Patio
- Patio Cover
- High Ceilings with Vigas
- Granite Counter Tops in Kitchen
- Vinyl Wood Grain Flooring or Tile Flooring in Living Room

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Girasol

1,340 sq. ft.

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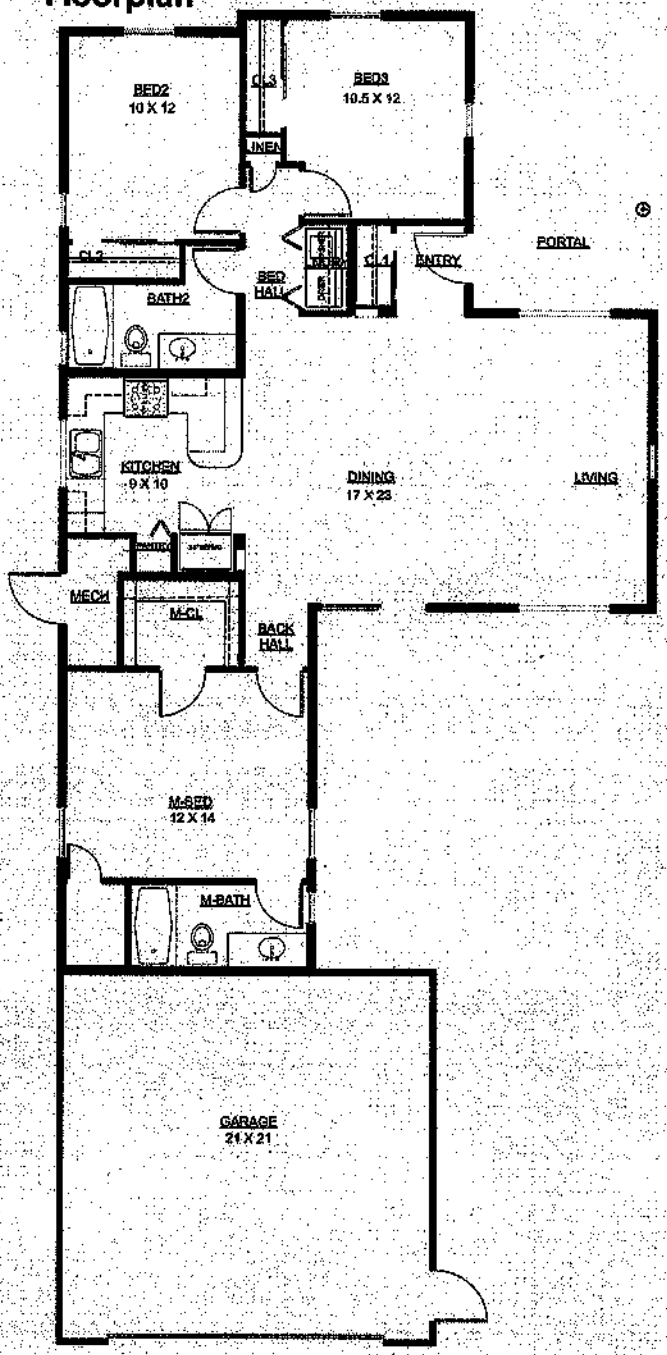

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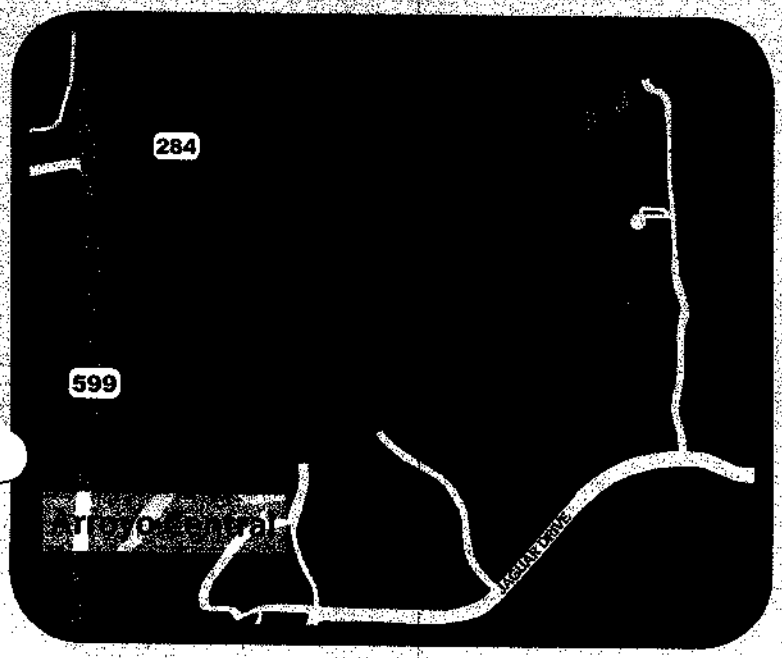

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CITY OF SANTA FE
AFFORDABLE HOUSING TRUST FUND (AHTF)
PROPOSAL SCORE SHEET / Bid Number '17/TBD/RFP

Name of Applicant/Project: Housing Trust (DPA)(AHTF)
Amount Requested: $ 100K

CRITERIA	Weighted Value	Evaluation Points (1-5)	Total Points	Max. Score
Funding • Leverage amounts from other sources • Operating budget shows evidence of sufficient revenue to administer the proposed program • Secured matching resources	20%	4	80	100
Need/Benefit & Project Feasibility Data driven analysis that shows: • The proposal is responsive to current and future market demand • Income mix, if applicable • Site control • Realistic time frame for completion of funded project/program activities	40%	5	200	200
Affordability • The proposal meets the Affordability Requirements serving households of up to 120% AMI	20%	4	80	100
Demonstrated Capability – Organizational Management • Staff • Organizational Experience • Expertise in type(s) of housing or service(s) proposed • Demonstrated Financial Soundness	20%	5	100	100
TOTAL	100%		440.	500

EVALUATION POINTS: 1 -- Lowest 5 – Highest

02/14/17

CDC Evaluator Name Signature Date

CITY OF SANTA FE (CSF)
NON-DISCLOSURE AND CONFLICT OF INTEREST STATEMENT

REQUEST FOR PROPOSAL #'17/28/P

EVALUATOR NAME: John A. Padilla

CSF policy is to prevent personal or organizational conflict of interest, or the appearance of such conflict of interest, in the award and administration of CSF contracts and Purchase Orders.

I, John A. Padilla, the undersigned, hereby certify that the following statements are true and correct and that I understand and agree to be bound by commitments contained herein.

I am acting at the request of CSF as a participant in the evaluation of *offers/ proposals* received in response to the *Request for Offers/ Request for Proposals,* entitled and/ or numbered
I am acting of my own accord and not acting under duress. I am not currently employed by, nor am I receiving any compensation from, nor have I been the recipient of any present or future economic opportunity, employment, gift, loan, gratuity, special discount, trip, favor, or service in connection with any *offer/ proposal* or involved *Offeror/Proposer* in return for favorable consideration. I have no preconceived position on the *relative merits of any of the offers/ proposals* nor have I established a personal preference or position on the worth or standing of any *Offeror/ Proposer* participating in this action. CSF policy is to prevent personal or organizational conflict of interest, or the appearance of such conflict of interest, in the award and administration of CSF contracts, including, but not limited to contracts for professional services, agreements with consultants and Purchase Orders.

I hereby certify that to the best of my knowledge and belief, no conflict of interest exists that may diminish my capacity to perform an impartial, technically sound, objective review of this proposal(s) or otherwise result in a biased opinion or unfair competitive advantage.
I agree not to disclose or otherwise divulge any information pertaining to the contents, status, or ranking of any *offer/ proposal* to anyone other than the team leader or other evaluation team members. I understand the terms and "disclose or otherwise divulge" to include, but are not limited to, reproduction of any part or any portion of any *offer/ proposal,* or removal of same from designated areas without prior authorization from the evaluation team leader. I agree to perform any and all evaluations of said *offers/ proposals* in an unbiased manner, to the best of my ability, and with the best interest of CSF paramount in all decisions.
I agree to return to CSF Purchasing Department all copies of proposals, as well as any abstracts, upon completion of the evaluation.

SIGNATURE AND DATE: 02/14/17

2017-2018 AHTF APPLICATION

General Information

Applicant Name(s): The Housing Trust

Address: 1111 Agua Fria

Santa Fe, NM 87501

Federal Tax ID # 85-0392520

City Business Reg. #: 16-00064129

CRS#: 0217164908

City/State/Zip Code: Santa Fe, NM 87504-0713

Telephone: 505-989-3960

Project Contact: Sharron Welsh/Denise Benavidez/

Email Address: swelsh@housingtrustonline.org

Amount of Allocation Requested: $ $150,000

Type of Applicant:

☐ Partnership ☐ Corporation ■ Non-Profit* ☐ Other

* Non-profit must provide proof of non-profit status. This proof includes submittal of current registration as charitable organization with the NM Attorney General's Office, covering the most recent Fiscal Year, or proof of exemption. Information can be obtained online at https://secure.nmag.gov/coros/. Verification should be in the form of the first page of the "NM Charitable Organization Statement."

Project Name: Downpayment Assistance for Moderate Income Workforce

Project Address (if applicable): NA

City/State/Zip Code: Santa Fe, NM

Priority Project

Select one of the categories your project falls under:

☐ **Rental Vouchers** - Provide supported rental vouchers (includes access to counseling, health services, case management, and other services) to renters earning less than 50%AMI;

☐ **Emergency Shelters including permanent supported shelter housing** - Development, construction, and preservation of shelter/permanent supported rental facilities, including infrastructure improvements;

☐ **Provision of Rental Units and Support Services for Low Income (up to 50% AMI) and Extremely Low Income Renters (less than 30% AMI)** - Acquisition, conversion, preservation and new construction of tiered income multi-family rental properties; including infrastructure or one-time emergency rental assistance;

■ **Down payment Assistance/Increase of Ownership Opportunities** - Down payment assistance in the form of soft-second mortgage that "buys down" principal amount of loan to lower monthly payment; Acquisition, conversion, preservation and new construction of homeownership housing;

☐ **Homeowner Rehabilitation Programs, Energy Efficiency Upgrades, Accessibility Retrofits** - Aacquisition, conversion, and preservation of affordable housing that accommodates needs of current householders.

Project Description:

Please provide a narrative of your project. Specifically who will be served, anticipated outcomes, etc. (If needed continue on a separate sheet)

First time home buyers are challenged to accumulate sufficient funds for down payment and closing costs typically required to purchase a home in Santa Fe. Market rate rents on 2 bedroom and larger units have soared over the $1,000/month mark according to the CBRE Apartment Market Survey, September 2016. A 98.2% occupancy rate exacerbates the problem. Home purchase candidates could pay less post purchase than the market rate rent on a two bedroom apartment. Similar trending data are probed in the Affordable Housing Plan updated April 2016. Downpayment assistance in the amount of $150,000 can help 8 to 10 households to get the foothold that will help to anchor them in Santa Fe while maintaining predictable and sustainable monthly housing costs. Several thousand of Santa Fe's working households have been assisted in this manner since the Housing Trust started its home buyer assistance programs in 1992. Outside sources such as HOME funds through NMMFA are at historic lows at this time due to state and federal "belt

tightening" since the national subprime mortgage crisis of 2007-2009.

The Affordable Housing Trust Fund is used primarily for those earning in excess of 80% AMI. We have supplemented it from available sources, but those are scarce.

Some of the funds distributed through the Affordable Housing Trust fund can be sourced back to the Housing Trust (resales of Eldergrace/Sand River units) and its affiliate, the Tierra Contenta Corporation. Both are currently challenged for sufficient resources to carry out the activities that would replenish the supply.

1. Funding:

How will the AHTF allocation be used for this project? What additional funding sources are secured or will be secured upon receipt of allocation? The City of Santa Fe requires financing from other sources to be committed prior to the release of funds from the AHTF.

The down payment assistance loans would supplement the home purchasers' own funds and other sources needed for down payment on a modest home. AHTF funds used for zero interest, nonamortizing, thirty year loans that is repaid at sale or refinance and is capped at $20,000 per transaction allocated in the minimum amount necessary to secure prime first mortgage loans. The client's eligibility is verified and the income certified by our staff. All transactions are underwritten and reviewed by an outside Loan Committee populated by volunteer mortgage lending professionals. All sources of funds are substantiated prior to loan committee review. When the first mortgage lender signals readiness to fund, the AHTF loan funds are deposited with the title company until all sources are in place to close the transaction. The Housing Trust maintains sufficient liquidity and credit to assure that it can front costs for *reimburseable grant expenses to assure timely transactions.*

The Housing Trust supplements the subsidies with its MI$aver program. Purchasers can borrow up to 20% of the purchase price in the form of an amortizing, interest bearing second mortgage with an interest rate at or below that on the first mortgage. The Housing Trust was granted $1,000,000 in for that purpose (out which about 25% is remaining. When reservations exceeded the funds available in December, 2016, the Board of Directors allocated an additional $500,000 from other sources to cover the needs anticipated in 2017. All of these funds are in hand.

Leveraging/Matching Requirement:

$3 to $1 Leveraging: for every $1 allocated through the AHTF, at least $3 from other sources will be expected (leveraged funds can include long term mortgages, other sources of grants, owner equity, proceeds from Low Income Housing Tax Credits, or the current value of land); organizational resources should be used to provide $1 of match (See Exhibit A for example)

Briefly Describe:

The typical transaction consists of $6,900 of client funds, $15,000 of AHTF funds, $21,000 of MI$aver funds and a conventional first mortgage of $170,000. This yields a 93:1 fund match on average. Additionally, the Housing Trust provides housing counseling and home purchase training classes for each client funded by a variety of other sources, including the city's general funds, HUD's Housing Counseling funds through intermediary sources, occasional funds from MFA and fees collected.

Project Budget and/or Development Pro-Forma: demonstrate use of leveraged and matching funds as well as evidence that operating budget is sufficient to administer the proposed program/project (please attach documents as well as give brief overview below)

2.Need/Benefit & Project Feasibility:

Demonstrate, using data-based analysis, that there is a clear connection between the proposed project/program and adopted Priority(s), and evidence that the proposed project/program meets current and future market demands. Provide narrative below (use additional sheets as necessary):

According to mortgage giant, Freddie Mac, "the average down payment for single-family homes bought in the first quarter of this year (2016) was 14.8 percent." While the median price in Santa Fe is far out of reach for the typical first time home purchaser, the median sales price paid by our clients in 2016 was $212,800. They put down $6,900 and paid an additional $4000 to $6000 of transaction costs out of their own pockets which totals over $11,000 (excluding any down payment assistance.) Without down payment assistance, the typical client would have to put down $25,000 and pay closing costs for a total of around $31,000. While Santa Fe's up and coming young consumers are a tenacious lot who met the challenge of an $11,000 nest egg needed for purchase, they are also savvy enough to move away if the housing cost burden exceeds the benefits of living and working in Santa Fe.

Likewise the Housing Trust carefully underwrites every transaction in order to provide the minimum assistance needed to enable the buyer to close on a home at a payment they can sustain while assisting as many buyers as possible. The transaction is made affordable in many cases through The Housing Trust's MI$aver program. In 2016, the Housing Trust provided $451,000 under the MI$aver program in the form of second mortgages that are amortizing and interest bearing at rates at or below the rate on the first mortgages. The amortizing seconds don't reduce the loan payments by much, but rather they eliminate the cost of Mortgage Insurance and premiums which afford substantial savings. Repaid funds are recycled by the Housing Trust for new down payment loans. In this way, the AHTF and CDBG funds have maximum impact with a very effective benefit to consumer and high efficiency level for the grantors.

What is the timeline for the project?

12 months. July 1, 2017 to June 30, 2018

Site Information (if applicable) Not Applicable

If your proposed project include acquisition, conversion, preservation and new construction of homeownership or rental housing, please provide the following information.

Site control is or will be in the form of*: ☐ Deed ☐ Option

☐ Lease (Term_____Years) ☐ Purchase Contract ☐ Other (explain)

* If project is recommended for funding, proof of site control must be provided before funds are disbursed.

Expiration Date of Contract, Option, or Lease_____(month/year)

Site Description:

Area of Site:_____acres or_____square feet

Is site zoned for your development? ☐ Yes ☐ No Zoning_____

If no, is site currently in the process of re-zoning?

☐ Yes ☐ No Re-Zoning_____

When is zoning issue to be resolved?_____(month/year)

Has the City approved the site plan and/or plat? ☐ Yes ☐ No

If yes, provide a copy of the site plan/plat.

Are there any other development reviews and approvals required? ☐ Yes ☐ No

If yes, explain:

_____

_____

_____

_____

List any required reports or studies underway or completed such as soils report, environmental assessment, traffic study)

_____

_____

_____

_____

Has the City issued the building permit? Yes No

Are all utilities presently available to the site? ☐ Yes ☐ No

If no, which utilities need to be brought to the site? _____

Who has responsibility of bringing utilities to site? _____

3.Affordability:

Outline the affordability time period for this project based on the following: (i.e. loans to $14,999 – 5 years, $15,000 to $40,000 – 10 years, 40,001-$100,000 – 15 years and over $100,000 – 20 years)

N/A

_____

_____

4.Demonstrated Capability - Organizational Capacity

Describe the expertise of your organization and past projects to provide the type of housing or programs proposed for funding:

The Santa Fe Community Housing Trust has in its 24+ year history provided homeownership counseling and training and managed its down payment assistance program in conjunction with the City of Santa Fe and New Mexico Mortgage Finance Authority. We have effectively administered the CDBG Down Payment Assistance Revolving Loan Fund for more than 22 years and acted as the administrator for numerous large federal and state grant programs, including HOPWA, Shelter + Care, and MFA CHDO and LIHTC, demonstrating regulatory compliance and timely reporting. Our Controller holds a Masters Degree in Business Administration and has more than 25 years experience in financial management. . All financial tracking and fund availability data is under his control. Our home buyer program manager has more than 35 years banking and lending experience. We utilize CounselorMax, the database that allows management of client information in tracking status for reporting.

Describe your staffing and attach resumes of key personnel: Our Controller maintains all financial tracking and funds availability data. The home buyer program manager has more than 35 years experience in banking, mortgage lending, underwriting, loan operations and closings. She will administer applications for assistance and eventual loan payoff. Our three Housing Counselors are nationally certified with 27 years of combined experience in assisting homebuyers.

Demonstrate Financial Soundness. Please submit the following documentation:

- Audited Financial Statements for 2015 and 2014.
- Current Statement of Assets & Liability

SUBMITTAL REQUIREMENTS

Please attach one (1) unbound copy of the following items in the following order:

_____Audited Financial Statements for 2015 and 2014

_____Current statement of Assets & Liability

_____Project budget

_____Leverage calculations

_____List of current board members

_____Fiscal Policies and Procedures

____Letter of compliance demonstrating cleared findings; or progress towards clearing findings

THE HOUSING TRUST

City of Santa Fe Affordable Housing Trust FY 2017-2018

Project Budget & Leverage

Revolving Loan for Moderate Income Workforce

HOMEBUYERS SERVED BY PROJECT 10

USE OF FUNDS	Per Home	Project
Average Client Home Sale Price	$ 220,000	$ 2,200,000
Closing Costs (2.6%)	5,720	57,200
Total Transaction	$ 225,720	$ 2,257,200

SOURCE OF FUNDS	Per Home	Project
First Mortgage	$ 172,440	$ 1,724,400
AHTF Down Payment Assistance	15,000	150,000
MI$aver Loan (amortizing at 4% interest)	30,580	305,800
Buyer Cash (3.5%)	7,700	77,000
Total Funding Sources	$ 225,720	$ 2,257,200

PROJECT LEVERAGE	Amount		Leverage and Match
AHTF Grant Request	$ 150,000		
Total Leveraging Funds	$ 1,801,400	$12.01	$12.01:1
Total Subrecipient Match	305,800	$2.04	$2.04:1

CITY OF SANTA FE
COMMUNITY DEVELOPMENT BLOCK GRANT (CDBG)
PROPOSAL SCORE SHEET / Bid Number '17/22/RFP

Name of Applicant/Project: Habitat for Humanity (HI) (CDBG)

Amount Requested: $ 60K.

Evaluation Criteria	Weighted Value	Evaluation Points 1 thru 5	Total Score	Max Score
Activity to be funded • Why needed? Does it address a gap? • Steps/phases to complete the activity • Who is served? • #s proposed to be served	20	X 5	100	100
National Objective Compliance • Benefits low/moderate income persons/households? • Prevents slum/blight • Does the activity serve residents Citywide or a Low to Moderate Income (LMI) Area (i.e. Census Tract)?	20	X 5	100	100
Consolidated Plan Compliance • Does the application demonstrate that it meets Consolidated Plan priorities?	10	X 5	50	50
Budget • Is proposed budget realistic? • Are other funding sources secured?	10	X 5	50	50
Performance Measurement/Work Plan • Are performance measurements, outcomes and proposed outcomes well presented? Realistic? Well-supported in the application? • Does the applicant have the administrative capacity to carry out the activity to be funded?	20	X 5	100	100
		Total Points	400.	400

CDC Evaluator Name

Signature

02/14/17
Date

CITY OF SANTA FE (CSF)
NON-DISCLOSURE AND CONFLICT OF INTEREST STATEMENT

REQUEST FOR PROPOSAL #'17/22/P

EVALUATOR NAME: John A. Padilla.

CSF policy is to prevent personal or organizational conflict of interest, or the appearance of such conflict of interest, in the award and administration of CSF contracts and Purchase Orders.

I, John A. Padilla., the undersigned, hereby certify that the following statements are true and correct and that I understand and agree to be bound by commitments contained herein.

I am acting at the request of CSF as a participant in the evaluation of *offers/ proposals* received in response to the *Request for Offers/ Request for Proposals,* entitled and/ or numbered
I am acting of my own accord and not acting under duress. I am not currently employed by, nor am I receiving any compensation from, nor have I been the recipient of any present or future economic opportunity, employment, gift, loan, gratuity, special discount, trip, favor, or service in connection with any *offer/ proposal* or involved *Offeror/Proposer* in return for favorable consideration. I have no preconceived position on the relative merits of any of the *offers/ proposals* nor have I established a personal preference or position on the worth or standing of any *Offeror/ Proposer* participating in this action. CSF policy is to prevent personal or organizational conflict of interest, or the appearance of such conflict of interest, in the award and administration of CSF contracts, including, but not limited to contracts for professional services, agreements with consultants and Purchase Orders.

I hereby certify that to the best of my knowledge and belief, no conflict of interest exists that may diminish my capacity to perform an impartial, technically sound, objective review of this proposal(s) or otherwise result in a biased opinion or unfair competitive advantage.
I agree not to disclose or otherwise divulge any information pertaining to the contents, status, or ranking of any *offer/ proposal* to anyone other than the team leader or other evaluation team members. I understand the terms and "disclose or otherwise divulge" to include, but are not limited to, reproduction of any part or any portion of any *offer/ proposal,* or removal of same from designated areas without prior authorization from the evaluation team leader. I agree to perform any and all evaluations of said *offers/ proposals* in an unbiased manner, to the best of my ability, and with the best interest of CSF paramount in all decisions.
I agree to return to CSF Purchasing Department all copies of proposals, as well as any abstracts, upon completion of the evaluation.

SIGNATURE AND DATE: 02/14/17

Cover Page

City of Santa Fe Community Development Block Grant Program FY 2017-2018	
Name of Nonprofit Organization:	Santa Fe Habitat for Humanity
Name of Executive Director:	Ted Swisher
Name of Board President:	Ken Crawford
Name, Contact Information (Address, Phone, and Email) of Person Submitting Request (Fiscal Agent if appropriate):	Ted Swisher 2520 Camino Entrada , Ste A SF NM 87507 505 986-5880 ted@santafehabitat.org
Amount Requested:	$60,000.00
Program Name or Service being requested for Funding:	Rehab/ Repair Program — capacity.
Brief Program or Service Description:	We provide critical emergency home repairs to low income citizens of Santa Fe.
Check which Category Describes your organization: 8. Private Non-Profit 9. For Profit 10. Public Agency 11. Government Agency	Private Non-Profit
DUNS or CAGE #	123202892
Business Registration #	16-00137265
Tax ID #	12 85-0355135
State CRS #	02-070960-00-9
Check One:	☒ Previous Recipient ☐ New Applicant
Funding Categories to be Addressed (Circle one):	☑ Housing ☐ Public Facility ☐ Public Service

*All money goes to the project - No payroll - reported.

*Who else is doing this work in the City.

Project Proposal Summary
(If funded, the following will be written into the contract Scope of Services with Accomplishment Levels along with details provided in Section A)

Activity Name	Rehab/Repair
Brief Summary of the activity	Provide emergency and critical home repairs to low income citizens.

Amount of CDBG funding requested for Activity	$ $60,000.00
Total budget of Activity	$ 91,200.00

To the best of my knowledge and belief, all data in this application is true and correct. If funded, I certify that the Applicant Organization is willing and able to adhere to the polices and procedures specified by the City of Santa Fe and all applicable program regulations of the US Department of Housing and Urban Development. Further, I understand there is not an agreement until the City of Santa Fe and the individual authorized to execute contracts on behalf of the Applicant Organization has signed the contract.

Authorized Signature *(sign in blue ink)* — Executive Director (Title) — 2/1/2017 (Date)

CDBG funds can be used for specific Eligible Activities as outlined in the Overview. Select one type of Eligible Activity category that best describes your Project.

Type of Eligible Activity (check one)

Activities Related to Housing	X
Other Real Property Activities	
Public Facilities/Improvements	
Public Service	

Section A: Activity to be funded

A1. Briefly describe the Activity you are requesting to fund with CDBG. This will help determine eligibility.

Repair or rehabilitation of owner occupied homes for residents of the city of Santa Fe who are at or below 60% of the Area Median Income. Only emergency or critical home repairs will be undertaken.

A2. Why is this Activity needed? Does it address a gap? Describe the degree of need, or the severity of a problem including cause, extent, location, frequency and duration that will be addressed by the project. Provide a description of service gaps the activity fills in the community. Additionally, supply data, such as demographics, reports and/or other information supporting your information and proving the need exists. **(Attach additional pages, if necessary)**

1. To our knowledge we are the only program in the city that provides this type of service.
2. Most of the clients in this program are not able to maintain their homes due to physical or financial circumstances.
3. On average we receive from 5 to 10 requests a month
4. Applicants general live in aging and substandard housing
5. The 2012 Housing Needs Assessment stated, "Home repair programs enable current homeowners to improve longer term affordability."

A.3 *If applicable, what steps or phases will be taken to complete the Activity* (provision of services, engineering/design, advertising, bidding, contract award, construction, etc.)?

SFHFH has a small yet dedicated staff and a reliable pool of contractors that ensure projects will be completed on time and cost effectively. The program has the advantage of only undertaking projects that are limited in scope and funding ($10,000 maximum). There are three phases: the application phase, the bidding phase and the construction phase once it has been determined that the client qualifies. During the application phase we advertise in

the New Mexican and Thrifty Nickel regarding the program and the fact we are taking application.

A.4 Describe the population that the Activity will serve and how this population will be served. Describe the outreach and recruitment activities which will be conducted to make the proposed activity services known and accessible to the targeted population. Please include where these outreach and recruitment activities will take place.

Our Program serves residents of the city of S.F. who have household incomes below 60% of the Area Median Income. While not limited to seniors, the vast majority of clients are over the age of 65. We serve veterans and people with disabilites - we have installed wheel chair ramps for residents confined to a wheel chair who had no reasonable access to their homes. We advertise in the New Mexican and the Thrifty Nickle in English and Spanish.

A.5 Estimate the number of total persons / households that will benefit from the CDBG funded portion of this Activity: (Fill in Households OR Persons depending on the type of Activity you are providing).

Total number of clients you anticipate serving:		
Households: 10	OR	Persons: 15

A.6 Use the following Table 1 to break out the number of persons you anticipate serving at the low (30-50% AMI) and very low-income (< 30% AMI) levels and the type of client (Refer to overview of CDBG program for the most recent income amounts). Along with income, please anticipate the number of clients that are severely disabled adults, homeless persons, abused children, battered spouses, and illiterate adults, persons with AIDS, migrant farm workers, and elderly. (All of these clients fall under the presumed benefit categories as defined by CDBG and therefore, all under low or extremely low income). This would apply mainly to Public Service or Public Facilities/Improvements Activities.

Extremely Low Income (<30% AMI)	Low Income (31-50%)	Moderate Income 51-80%	Illiterate adults	Abused children	Severely Disabled Persons	Migrant Farm Workers	Elderly	Persons with AIDS	Homeless Persons
2	7	1			1		10		

Table 1

A.7 Use the following Table 2 to breakout the number of households you anticipate serving at the income levels listed. (Refer to the 2016 AMI table on pg. 18 for the most recent income amounts). This would apply mainly to CDBG funding for housing projects such as Down Payment Assistance and Rehabilitation Activities.

Extremely Low Income (<30% AMI)	Low Income (31-50%)	Moderate Income (51-80%)	Non-low Moderate Income (81-100%)	Female Head of Household
2	7	1		8

Table 2

A.8 CDBG funded construction activities must be in compliance with local land use plans and zoning. Explain how the proposed activity conforms to local plans and zoning ordinances. Provide a copy of the page(s) of resource document(s), pertinent sections, and page(s). This only applies to projects where the CDBG funds will used for the actual construction, not acquisition.

This is a repair program for existing homes so zoning will not be an be an issue and all projects will be properly permitted by licensed contractors.

A.9 Please describe the organization in terms of its administrative capacity and its qualifying experience and length of experience with activities or projects similar to the proposed Activity. Include purpose, goals, programs, activities, clients, and accomplishments, if any, in the area of activity for which funding is requested. Give examples of and list experience.

SFHFH has a lean but highly qualified staff that have been consistently building 6 new homes per year for over 10 years and repairing homes for 5 years. The organizations completed its 107th house recently. Ex. Dir., Ted Swisher was named 2016 Green Builder of the year and has over 40 years experience in affordable housing. Since a repair program was started 5 years ago, we have completed over 40 projects ranging from $45,000 to just a few hundred dollars. We also collaborate with Central New Mexico housing which receives funding from the state to conduct energy efficiency repairs and improvements.

A.10 : Briefly describe your organizations experience in government contract administration, and knowledge of federal regulations governing acquisition, procurement, equal employment opportunity, and labor standards.

SFHFH has successfully administered several government contracts including HOME and the Affordable Housing Tax Credit program through MFA. SHOP, a HUD program that provides funding for land and infrastructure. The Federal Home Loan Bank's down payment assistance program. We have also worked successfully with the city's CDBG and AHTF programs for over 10 years. We follow all regulations regarding labor and equal employment opportunity.

B. National Objective Compliance

1. Benefits Low/ Moderate Income persons/households by:	
Area Benefit (eligible area) (LMA)	
Limited Clientele (LMC)	
Housing Activities (LMH)	X
Job Creation or Retention (LMJ)	

B.2 Is the service area city wide: (X) yes ( )no
If no, fill out B.3.

B.3 If an activity is based on an area benefit, identify the Census Tract(s) and Block Group(s) that will be served. Make sure to read the Overview for a clear understanding of the requirements of an area benefit. Attach a map of the area.

Census Tract	Block Group	Total Population	Low/Mod Income Population	% Low/ Mod Income
Total				

B.4 Explain fully how the proposed project meets the CDBG National Objective selected above. Provide substantiating documentation supporting the claims. Refer to Overview for more detail.

The project meets the National Objective for Housing Activity by directly addressing inadequate or substandard housing for low income households. Only essential or emergency repairs will be performed - no "cosemetic only" work will done. In addition, all homeowners will be low income and we project that at least 75% will be below 50% AMI. Our track record in working with the city in the past speaks for itself. We are meeting a critical need in a cost effective manner and covering administrative and management expenses ourselves. In addition to our local track record, it may be relevant to mention that Habitat is the 16th largest home builder in the US.

C. Consolidated Plan Compliance

The City of Santa Fe provides guidance in its 2013-2017 Consolidated Plan on funding uses, whether Federal, State, City, or Private. In accordance with federal regulations, each project must be consistent with the priorities outlined in the City's Consolidated Plan. (See Consolidated Plan on City website) Mark the **one priority** that the proposed project will meet.

P-25 Priority Needs

Check	Priority Need Name	Priority Level	Population Served	Goals Addressed
	Rental Vouchers	High	Extremely low-income renters; people at risk of being homeless; persons with disabilities; homeless youth; veterans; elderly; families in transition; persons with HIV/AIDS and their families; public housing residents; mentally ill; chronic substance abusers; victims of domestic violence	Reduced rate of cost burden and corresponding drop in poverty rate for homeless households and those in danger of becoming homeless. *(Increase Opportunities for At Risk Populations);* Inventory of rental units and vouchers expanded to meet increased demand *(Increase Affordable Housing Opportunities)*
	Emergency Shelter (note could be classified as Public Service which is restricted in allocation amount)	High	Extremely low-income residents; chronic homeless; homeless youth; veterans; families in transition; mentally ill; chronic substance abusers; victims of domestic violence	Reduced rate of cost burden and corresponding drop in poverty rate for homeless households and those in danger of becoming homeless. *(Increase Opportunities for At Risk Populations)*
	Support Services for Homeless or People at Risk of Homelessness (note could be classified as Public Service which is restricted in allocation amount)	High	Extremely low-income renters; people at risk of being homeless; persons with disabilities; homeless youth; veterans; elderly; families in transition; persons with HIV/AIDS and their families; public housing residents; mentally ill; chronic substance abusers; victims of domestic violence	Reduced rate of cost burden and corresponding drop in poverty rate for homeless households and those in danger of becoming homeless. *(Increase Opportunities for At Risk Populations)*
	Refinancing Services and Support for Current Homeowners	High	Low-income homeowners; homeowners in risk of foreclosure; homeowners in substandard housing	Reduced rate of cost burden and corresponding drop in poverty rate for homeless households and those in danger of becoming homeless. *(Increase Opportunities for At Risk Populations);* Increased homeownership opportunities and support for long term affordability and accessibility for current homeowners. *(Increase Affordable Housing Opportunities)*

Priority Needs (cont.)

Check	Priority Need Name	Priority Level	Population Served	Goals Addressed
X	Homeowner Rehabilitation Programs, Energy-efficiency Upgrades, Accessibility Retrofits	High	Low- and moderate-income homeowners; residents in redeveloping or transitioning neighborhoods; homeowners living in aging or substandard housing stock; seniors who need to "age in place;" people with disabilities	Increased homeownership opportunities and support for long term affordability and accessibility for current homeowners. *(Increase Affordable Housing Opportunities);* Housing opportunities reflect emerging needs, changing demographics and are aligned with redevelopment projects, economic development objectives and sustainability goals *(Address Emerging and Current Needs and Changing Demographics)*
	Construction of affordably-priced homes for homeownership	Low	Low- and moderate-income homebuyers and current renters; local workforce	Increased homeownership opportunities and support for long term affordability and accessibility for current homeowners. *(Increase Affordable Housing Opportunities)*
	Fair Housing Outreach	High	Low- and moderate-income renters; low-income landlords; persons with disabilities; Spanish speakers; large families; general public	Housing opportunities reflect emerging needs, changing demographics and are aligned with redevelopment projects, economic development objectives and sustainability goals *(Address Emerging and Current Needs and Changing Demographics)*
	Diversity of Housing Types	Low	Low- and moderate-income renters; seniors; small households; entrepreneurs; aging veterans; entrepreneurs and other self-employed	Housing opportunities reflect emerging needs, changing demographics and are aligned with redevelopment projects, economic development objectives and sustainability goals *(Address Emerging and Current Needs and Changing Demographics)*
	Non-Housing Community Facilities and Services	High	Low- and moderate-income residents; residents in redeveloping or transitioning neighborhoods; youth	Housing opportunities reflect emerging needs, changing demographics and are aligned with redevelopment projects, economic development objectives and sustainability goals *(Address Emerging and Current Needs and Changing Demographics)*

Priority Needs (cont.)

Check	Priority Need Name	Priority Level	Population Served	Goals Addressed
	Provision of Rental Units and Support Services for LI/ VLI Renters	High	Low- and very low-income renters; persons transitioning out of homelessness; renters in need of support services; public housing residents	Inventory of rental units and vouchers expanded to meet increased demand *(Increase Affordable Housing Opportunities);* Housing opportunities reflect emerging needs, changing demographics and are aligned with redevelopment projects, economic development objectives and sustainability goals *(Address Emerging and Current Needs and Changing Demographics)*
	Rental Rehabilitation	Low	Low- and moderate-income renters; low-income landlords; residents of low- income neighborhoods that are redeveloping or in transition; public housing residents	Inventory of rental units and vouchers expanded to meet increased demand *(Increase Affordable Housing Opportunities);* Housing opportunities reflect emerging needs, changing demographics and are aligned with redevelopment projects, economic development objectives and sustainability goals *(Address Emerging and Current Needs and Changing Demographics)*
	Down Payment Assistance	High	Low- and moderate-income residents who are "buyer ready"; first responders (fire, police, etc.)	Increased homeownership opportunities and support for long term affordability and accessibility for current homeowners. *(Increase Affordable Housing Opportunities)*
	Homebuyer Training & Counseling	High	Low- and moderate-income homebuyers; current renters	Increased homeownership opportunities and support for long term affordability and accessibility for current homeowners. *(Increase Affordable Housing Opportunities)*

D. Budget

D1. Describe the Proposed Budget for this Activity. Please explain all budgeted expenses including contractual services, personnel services, commodities, and capital outlay. Also explain what the CDBG funds will be used for. Also explain the effect of not receiving any or only a portion of a CDBG allocation has on the project budget.

Our Repair Program is requesting $60,00.00 of which 100% the of the funds will be used for the program. All other expenses will be covered by SFHFH out of its own resources including $31,200 in administrative expenses. Funding will be use to pay contractors for labor and materials for a minimum of 10 projects. If not funded, at least 10 low income would not receive essential repairs and SF's housing stock will be negatively impacted.

D.2 Please complete the following table to identify the funding sources and amounts. Indicate total project cost that incorporates the total CDBG request and what funds or services, if any, the sponsor and/or other agencies will contribute. Also enter other ***committed*** funding sources (committed funds are funds available or will be available to fund the Activity during the CDBG Fiscal Year). Please be as accurate as possible. Should your organization be awarded funding, a revised budget (as needed) will become an Addendum to the CDBG Contract.

Type of funding	Source/ amount	Source/ amount	Source/ amount	Totals
Requested CDBG amount				$ $60,000.00
Other HUD funds i.e. HOME, Section 108				$
Other Federal Funds				$
City Funding i.e. Youth and Family, Human Services				$
State funding, i.e. MFA				$
Other i.e. in- kind, private funds				$ 31,200.00

Total of all funding sources		**$** $91,200.00

D.3 If you are proposing to utilize CDBG funds to pay for staff costs, please list each position title and the percentage of their salary and benefits that will be funded by CDBG. Depending on the Activity, listing this information does not guarantee the position will be funded by CDBG as it may not be eligible.

PERSONNEL Position Title	**New (Y/N)**	**% salary & benefits paid for with CDBG**
Willie Marquez		0
Fritz Denny		0

E. Performance Measurement System/Work Plan

CDBG/ Work Plan - FY 2017-2018

Provide the performance measurement goals, objectives and outcomes for your proposed CDBG project. Please refer to Exhibit B at the end of this document. Based on these measurements, attach a Work Plan that describes the goals, objectives and outcomes in greater detail and be:

(B) Specific
(C) Measurable
(D) Achievable
(E) Results-orientated
(F) Time bound

F. Submittal Requirements: Required Attachments

Please attach one (1) unbound copy of the following items <u>in the following order:</u>

X ____Transmittal Letter

X ____On your organization's letterhead, prepare a brief letter outlining the following:

- A brief summary of your proposed project;
- Funding amount requested; and
- Name, telephone number and address of a contact person(s)

X ____Board of Directors' Authorization to Request Funds

X ____Work Plan (as noted above)

X ____Certificate of Non-profit Incorporation

X ____IRS documentation showing qualification as a nonprofit corporation under Section 501(c) (3), and most recently submitted Federal Tax Return (Form 990 or 990EZ) or other financial statement.

X ____Organization Chart

X ____Copy of Agency's most Recent Independent Audit

X ____Agency's accounting and procurement policies

X ____Confidentiality and Disclosure of Information

CITY OF SANTA FE
COMMUNITY DEVELOPMENT BLOCK GRANT (CDBG)
PROPOSAL SCORE SHEET / Bid Number '17/22/RFP

Name of Applicant/Project: Homewise (HI) CDBG

Amount Requested: $ 100K.

Evaluation Criteria	Weighted Value	Evaluation Points 1 thru 5	Total Score	Max Score
Activity to be funded • Why needed? Does it address a gap? • Steps/phases to complete the activity • Who is served? • #s proposed to be served	20	X 4	80	100
National Objective Compliance • Benefits low/moderate income persons/households? • Prevents slum/blight • Does the activity serve residents Citywide or a Low to Moderate Income (LMI) Area (i.e. Census Tract)?	20	X 4	80	100
Consolidated Plan Compliance • Does the application demonstrate that it meets Consolidated Plan priorities?	10	X 5	50	50
Budget • Is proposed budget realistic? • Are other funding sources secured?	10	X 5	50	50
Performance Measurement/Work Plan • Are performance measurements, outcomes and proposed outcomes well presented? Realistic? Well-supported in the application? • Does the applicant have the administrative capacity to carry out the activity to be funded?	20	X 5	100	100
		Total Points	360	**400**

CDC Evaluator Name Signature Date 02/14/17

CITY OF SANTA FE (CSF)
NON-DISCLOSURE AND CONFLICT OF INTEREST STATEMENT

REQUEST FOR PROPOSAL #'17/22/P

EVALUATOR NAME: John A. Padilla.

CSF policy is to prevent personal or organizational conflict of interest, or the appearance of such conflict of interest, in the award and administration of CSF contracts and Purchase Orders.

I, John A. Padilla., the undersigned, hereby certify that the following statements are true and correct and that I understand and agree to be bound by commitments contained herein.

I am acting at the request of CSF as a participant in the evaluation of *offers/ proposals* received in response to the *Request for Offers/ Request for Proposals,* entitled and/ or numbered
I am acting of my own accord and not acting under duress. I am not currently employed by, nor am I receiving any compensation from, nor have I been the recipient of any present or future economic opportunity, employment, gift, loan, gratuity, special discount, trip, favor, or service in connection with any *offer/ proposal* or involved *Offeror/Proposer* in return for favorable consideration. I have no preconceived position on the relative merits of any of the *offers/ proposals* nor have I established a personal preference or position on the worth or standing of any *Offeror/ Proposer* participating in this action. CSF policy is to prevent personal or organizational conflict of interest, or the appearance of such conflict of interest, in the award and administration of CSF contracts, including, but not limited to contracts for professional services, agreements with consultants and Purchase Orders.

I hereby certify that to the best of my knowledge and belief, no conflict of interest exists that may diminish my capacity to perform an impartial, technically sound, objective review of this proposal(s) or otherwise result in a biased opinion or unfair competitive advantage.
I agree not to disclose or otherwise divulge any information pertaining to the contents, status, or ranking of any *offer/ proposal* to anyone other than the team leader or other evaluation team members. I understand the terms and "disclose or otherwise divulge" to include, but are not limited to, reproduction of any part or any portion of any *offer/ proposal,* or removal of same from designated areas without prior authorization from the evaluation team leader. I agree to perform any and all evaluations of said *offers/ proposals* in an unbiased manner, to the best of my ability, and with the best interest of CSF paramount in all decisions.
I agree to return to CSF Purchasing Department all copies of proposals, as well as any abstracts, upon completion of the evaluation.

02/14/17

SIGNATURE AND DATE:

COPY
Cover Page

City of Santa Fe Community Development Block Grant Program FY 2017-2018	
Name of Nonprofit Organization:	Homewise, Inc.
Name of Executive Director:	Michael Loftin
Name of Board President:	Teresa Leger de Fernandez
Name, Contact Information (Address, Phone, and Email) of Person Submitting Request (Fiscal Agent if appropriate):	Laura Altomare, Director of Communications and Development 1301 Siler Road, Building D, Santa Fe NM, 87507 505-955-7039 laltomare@homewise.org
Amount Requested:	$100,000
Program Name or Service being requested for Funding:	Home Improvement Loans for Clients Under 80% AMI

Brief Program or Service Description:

Homewise is seeking CDBG Funding to assist homeowners below 80% AMI in the City of Santa Fe to maintain their asset through home improvement services. These services include loans needed for repairs related to the health and safety of the homeowner, emergency repairs and handicap modifications and in recent years, a focus on energy and water saving improvements and repairs to address the rising cost of energy and the conservation of water in our community.

Check which Category Describes your organization:

8. Private Non-Profit X
9. For Profit
10. Public Agency
11. Government Agency

DUNS or CAGE #	016268406
Business Registration #	16-00063137
Tax ID #	85-0346325
State CRS #	02-062377-00-1

Check One: X Previous Recipient
☐ New Applicant

Funding Categories to be Addressed (Circle one):

☐ XX Housing
☐ Public Facility
☐ Public Service

*Similar to the H.H. projects.

Project Proposal Summary
(If funded, the following will be written into the contract Scope of Services with Accomplishment Levels along with details provided in Section A)

Activity Name: Home Improvement Loans for Clients Under 80% AMI

Brief Summary of Activity:
Homewise is seeking CDBG Funding to assist homeowners below 80% AMI in the City of Santa Fe to maintain their asset through home improvement services. These services include loans needed for repairs related to the health and safety of the homeowner, emergency repairs and handicap modifications and in recent years, a focus on energy and water saving improvements and repairs to address the rising cost of energy and the conservation of water in our community.

Amount of CDBG funding requested for Activity	$ *100,000*
Total budget of Activity	$ 2,003,000

To the best of my knowledge and belief, all data in this application is true and correct. If funded, I certify that the Applicant Organization is willing and able to adhere to the polices and procedures specified by the City of Santa Fe and all applicable program regulations of the US Department of Housing and Urban Development. Further, I understand there is not an agreement until the City of Santa Fe and the individual authorized to execute contracts on behalf of the Applicant Organization has signed the contract.

Authorized Signature *(sign in blue ink)* Title Date

CDBG funds can be used for specific Eligible Activities as outlined in the Overview. Select one type of Eligible Activity category that best describes your Project.

Type of Eligible Activity (check one)

Activities Related to Housing	X
Other Real Property Activities	
Public Facilities/Improvements	
Public Service	

Section A: Activity to be funded

A.1 Briefly describe the Activity you are requesting to fund with CDBG. This will help determine eligibility.
2017 marks thirty-one years that Homewise has been assisting homeowners in the City of Santa Fe to maintain their asset through home improvement services. These services include providing loans for repairs needed for the health and safety of the homeowner, emergency repairs and handicap modifications and in recent years, a focus on energy and water saving improvements and repairs to address the rising cost of energy and the conservation of water in our community. The request for CDBG funds is to provide these home improvement loans for customers below 80% AMI. We will continue to emphasize the importance of water and energy saving improvements, while also providing for those critical repairs that improve the health and safety of low income owners' homes.

A.2 Why is this Activity needed? Does it address a gap? Describe the degree of need, or the severity of a problem including cause, extent, location, frequency and duration that will be addressed by the project. Provide a description of service gaps the activity fills in the community. Additionally, supply data, such as demographics, reports and/or other information supporting your information and proving the need exists. **(Attach additional pages, if necessary)**
SEE ATTACHED

A.3 If applicable, what steps or phases will be taken to complete the Activity (provision of services, engineering/design, advertising, bidding, contract award, construction, etc.)?
Homewise has been offering home improvement loan services for over thirty years and is well prepared to deploy CDBG funding. We employ a dedicated loan analyst who works with our loan officers and the home improvement loan customers to help them complete the loan application and follows them through the entire construction process. The loan analyst ensures that the contractor selected by the owner is licensed and insured and that the owner fully understands all the terms of the loan package. Homewise also conducts outreach to local contractors to make them aware of the financing options we offer for their clients who are unable to pay cash for the needed repair or home improvement project. Through a newly implemented online loan application system, contractors can assist their customers in applying for Homewise financing at the point of sale, receiving instant prequalification for the loan. This assists contractors to complete their sales process and helps clients obtain needed financing on the spot, rather than requiring additional wait time to seek out financing and loan approval.

A.4 Describe the population that the Activity will serve and how this population will be served. Describe the outreach and recruitment activities which will be conducted to make the proposed activity services known and accessible to the targeted population. Please include where these outreach and recruitment activities will take place.
The target population for Home Improvement CDBG funds will be Santa Fe homeowners whose household income is below 80% of AMI, and who need deferred assistance in order to make necessary home repairs and improvements. These owners are typically limited from

getting fully amortizing loans because such loan payments would result in Debt to Income ratios that are too high. CDBG funds help lower, or eliminate, the monthly payment. The table below shows the borrowers we've helped with previous CDBG home improvement loans:

CDBG Home Improvement Loans	FY14-15 Grant Agreement	FY 15-16 Grant Agreement	FY 16-17 Grant Agreement through 12.31.2016	Total	% of Total
Income <30% AMI	0	1	1	2	8%
Income 30-50% AMI	1	3	1	5	22%
Income 51-80% AMI	4	8	4	16	70%
# Households headed by female	2	8	6	16	70%
# Hispanic households	3	6	3	12	52%
# of households over age 62	3	5	3	11	48%

The Homewise marketing and outreach strategy is a multi-faceted plan that leverages community and business partnerships, public relations, client testimonials, events, advertising, sales collateral, direct mail, website and e-marketing, social media, and brand management. We take care to ensure that materials are impactful and accessible, consistent in design and message, with clear and inviting language. All marketing and outreach activities are aligned to meet the goals of effectively communicating the benefits of Homewise services to our target audience and upholding our reputation in the community.

In addition, we focus specific outreach efforts to local contractors to make them aware of the financing available for their clients. Contractors often refer these clients to Homewise, especially if the client expresses difficulty in paying for a quoted repair. With our newly implemented online loan application tool, contractors are able to help their clients apply for Homewise financing at the point of sale and receive instant prequalification, allowing them to proceed with their repair or home impriovement project without any financing delays.

A.5 Estimate the number of total persons / households that will benefit from the CDBG funded portion of this Activity: (Fill in Households OR Persons depending on the type of Activity you are providing).

Total number of clients you anticipate serving:		
Households: 10-15	**OR**	Persons:

A.6 Use the following Table 1 to break out the number of persons you <u>anticipate</u> serving at the low (30-50% AMI) and very low-income (< 30% AMI) levels and the type of client (Refer to overview of CDBG program for the most recent income amounts). Along with income, please anticipate the *number of clients* that are severely disabled adults, homeless persons, abused children, battered spouses, and illiterate adults, persons with AIDS, migrant farm workers, and elderly. (All of these clients fall under the presumed benefit categories as defined by CDBG and therefore, all under low or extremely low income). This would apply mainly to Public Service or Public Facilities/Improvements Activities.

Extremely Low Income (<30% AMI)	Low Income (31-50%)	Moderate Income 51-80%	Illiterate adults	Abused children	Severely Disabled Persons	Migrant Farm Workers	Elderly	Persons with AIDS	Homeless Persons
1	4	5	0	0	1	0	3	0	0

Table 1

A.7 Use the following Table 2 to breakout the number of households you anticipate serving at the income *levels listed.* (*Refer to the* 2016 AMI table on pg. 18 for the most recent income amounts). This would apply mainly to CDBG funding for housing projects such as Down Payment Assistance and Rehabilitation Activities.

Extremely Low Income (<30% AMI)	Low Income (31-50%)	Moderate Income (51-80%)	Non-low Moderate Income (81-100%)	Female Head of Household
1	4	5	0	6

Table 2

A.8 CDBG funded construction activities must be in compliance with local land use plans and zoning. Explain how the proposed activity conforms to local plans and zoning ordinances. Provide a copy of the page(s) of resource document(s), pertinent sections, and page(s). This only applies to projects where the CDBG funds will used for the actual construction, not acquisition.
NOT APPLICABLE

A.9 Please describe the organization in terms of its administrative capacity and its qualifying experience and length of experience with activities or projects similar to the proposed Activity. Include purpose, goals, programs, activities, clients, and accomplishments, if any, in the area of activity for which funding is requested. Give examples of and list experience.

Homewise was founded in 1986 to help Santa Fe homeowners make improvements to their homes. Since that time 2,111 (as of 10/31/16) families and individuals have improved their homes through Homewise. Over $29,942,907 has been loaned for home improvement projects.

Homewise has been recognized for our effectiveness towards our mission of supporting homeowners to achieve financial security through homeownership. Homewise's efficiency and effectiveness is audited and reviewed by various funders including the City of Santa Fe,

NeighborWorks® America, the U.S. Treasury's Community Development Financial Institutions Fund (the CDFI Fund), Aeris through the Aeris™ Rating system of CDFIs, and our private auditors. Historically, these audits have consistently verified our effectiveness and our capacity to manage the organization to high standards of efficiency and accountability.

The Homewise staff responsible for home improvement services has many years of experience in financial counseling and homebuyer education with an emphasis on maintaining the home as an asset for financial security into the future. They work to create a seamless process for owners seeking those services. They are backed by a skilled accounting and finance staff and a marketing department with expertise in messaging and media appropriate for these services. The Homewise staff has administered several previous CDBG allocations for home improvement lending.

The staff directly responsible for Home Improvement lending includes:

Mark Vanderlinden, Chief Lending Officer, has over 30 years of experience in mortgage lending and operations management at Fannie Mae, Federal Home Loan Bank of Atlanta and the New Mexico Mortgage Finance Authority. He is responsible for managing Home Improvement Lending services.

Sheryl Kassetas, Loan Originations Manager, Gina Smyer, Loan Closing Manager, oversee the origination and closing of home improvement loans, including a team of 10 Loan Officer and Loan Processing staff members.

Lisa Wilson, Chief Financial Officer, Robin Kvech, Controller, Sarah Geisler, Senior Business Analyst, and Kate Preteska, Business Analyst, use their combined corporate accounting, business management and project and records management to oversee reporting and tracking of all government contracts awarded to Homewise.

Laura Altomare, Director of Communications and Development, and Rachel Silva, Marketing Manager, bring their seasoned marketing and communications expertise to develop the Homewise messaging and media strategies that will reach the target market for the home improvement services.

Michael Loftin, Chief Executive Officer, has 40 years of experience in housing and community development. He oversees Homewise's programs and services from strategy development to implementation and operation.

A.10 Briefly describe your organizations experience in government contract administration, and knowledge of federal regulations governing acquisition, procurement, equal employment opportunity, and labor standards.

Homewise has administered and currently administers numerous programs under government contracts, including prior CDBG allocations, HOME funding from the New Mexico Mortgage Finance Authority, U.S. Department of Housing and Urban Development, City of Santa Fe Affordable Trust Fund, U.S. Department of Treasury CDFI Fund, and NeighborWorks® America.

The Homewise finance department uses a sophisticated reporting and tracking system to meet the needs of government contract administration. The system's components include our proprietary client management database, which integrates information with our loan origination and loan servicing systems to provide us with access to all the information we need to meet compliance and reporting requirements.

B. National Objective Compliance

1. Benefits Low/ Moderate Income persons/households by:	
Area Benefit (eligible area) (LMA)	
Limited Clientele (LMC)	
Housing Activities (LMH)	XX
Job Creation or Retention (LMJ)	

B.2 Is the service area city wide: (XX) yes ( )no
If no, fill out B.3.

B.3 If an activity is based on an area benefit, identify the Census Tract(s) and Block Group(s) that will be served. Make sure to read the Overview for a clear understanding of the requirements of an area benefit. Attach a map of the area.
NOT APPLICABLE

Census Tract	Block Group	Total Population	Low/Mod Income Population	% Low/ Mod Income
Total				

B.4 Explain fully how the proposed project meets the CDBG National Objective selected above. Provide substantiating documentation supporting the claims. Refer to Overview for more detail.

CDBG home improvement lending meets the National Objective of providing housing services for low and moderate income households. Homewise uses CDBG funds for owners whose household income is below 80% of AMI. The table below shows the borrowers we have served in the last three years from CDBG home improvement loan allocations. Most of the borrowers who fall in the 51-80% AMI category tend to have incomes not higher than 60% AMI.

CDBG Home Improvement Loans	FY14-15 Grant Agreement	FY 15-16 Grant Agreement	FY 16-17 Grant Agreement through 12.31.2016	Total	% of Total
Income <30% AMI	0	1	1	2	8%
Income 30-50% AMI	1	3	1	5	22%
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# Households headed by female	2	8	6	16	70%
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# of households over age 62	3	5	3	11	48%

C. Consolidated Plan Compliance

The City of Santa Fe provides guidance in its 2013-2017 Consolidated Plan on funding uses, whether Federal, State, City, or Private. In accordance with federal regulations, each project must be consistent with the priorities outlined in the City's Consolidated Plan. (See Consolidated Plan on City website) Mark the **one priority** that the proposed project will meet.

P-25 Priority Needs

Check	Priority Need Name	Priority Level	Population Served	Goals Addressed
	Rental Vouchers	High	Extremely low-income renters; people at risk of being homeless; persons with disabilities; homeless youth; veterans; elderly; families in transition; persons with HIV/AIDS and their families; public housing residents; mentally ill; chronic substance abusers; victims of domestic violence	Reduced rate of cost burden and corresponding drop in poverty rate for homeless households and those in danger of becoming homeless. *(Increase Opportunities for At Risk Populations);* Inventory of rental units and vouchers expanded to meet increased demand *(Increase Affordable Housing Opportunities)*
	Emergency Shelter (note could be classified as Public Service which is restricted in allocation amount)	High	Extremely low-income residents; chronic homeless; homeless youth; veterans; families in transition; mentally ill; chronic substance abusers; victims of domestic violence	Reduced rate of cost burden and corresponding drop in poverty rate for homeless households and those in danger of becoming homeless. *(Increase Opportunities for At Risk Populations)*
	Support Services for Homeless or People at Risk of Homelessness (note could be classified as Public Service which is restricted in allocation amount)	High	Extremely low-income renters; people at risk of being homeless; persons with disabilities; homeless youth; veterans; elderly; families in transition; persons with HIV/AIDS and their families; public housing residents; mentally ill; chronic substance abusers; victims of domestic violence	Reduced rate of cost burden and corresponding drop in poverty rate for homeless households and those in danger of becoming homeless. *(Increase Opportunities for At Risk Populations)*
	Refinancing Services and Support for Current Homeowners	High	Low-income homeowners; homeowners in risk of foreclosure; homeowners in substandard housing	Reduced rate of cost burden and corresponding drop in poverty rate for homeless households and those in danger of becoming homeless. *(Increase Opportunities for At Risk Populations);* Increased homeownership opportunities and support for long term affordability and accessibility for current homeowners. *(Increase Affordable Housing Opportunities)*

Priority Needs (cont.)

Check	Priority Need Name	Priority Level	Population Served	Goals Addressed
XX	Homeowner Rehabilitation Programs, Energy-*efficiency Upgrades,* Accessibility Retrofits	High	Low- and moderate-income homeowners; residents in redeveloping or *transitioning* neighborhoods; homeowners living in aging or substandard housing stock; seniors who need to "age in place;" people with disabilities	Increased homeownership opportunities and support for long term affordability and accessibility for current homeowners. *(Increase Affordable Housing Opportunities);* Housing opportunities reflect emerging needs, changing demographics and are aligned with redevelopment projects, economic development objectives and sustainability goals *(Address Emerging and Current Needs and Changing Demographics)*
	Construction of *affordably-priced* homes for homeownership	Low	Low- and moderate-income homebuyers and current renters; local workforce	Increased homeownership opportunities and support for long term affordability and accessibility for current homeowners. *(Increase Affordable Housing Opportunities)*
	Fair Housing Outreach	High	Low- and moderate-income renters; low-income landlords; persons with disabilities; Spanish speakers; large families; general public	Housing opportunities reflect emerging needs, changing demographics and are aligned with redevelopment projects, economic development objectives and sustainability goals *(Address Emerging and Current Needs and Changing Demographics)*
	Diversity of Housing Types	Low	Low- and moderate-income renters; seniors; small households; entrepreneurs; aging veterans; entrepreneurs and other self-employed	Housing opportunities reflect emerging needs, changing demographics and are aligned with redevelopment projects, economic development objectives and sustainability goals *(Address Emerging and Current Needs and Changing Demographics)*
	Non-Housing Community Facilities and Services	High	Low- and moderate-income residents; residents in redeveloping or transitioning neighborhoods; youth	Housing opportunities reflect emerging needs, changing demographics and are aligned with redevelopment projects, *economic development objectives and* sustainability goals *(Address Emerging and Current Needs and Changing Demographics)*

Priority Needs (cont.)

Check	Priority Need Name	Priority Level	Population Served	Goals Addressed
	Provision of Rental Units and Support Services for LI/ VLI Renters	High	Low- and very low-income renters; persons transitioning out of homelessness; renters in need of support services; public housing residents	Inventory of rental units and vouchers expanded to meet increased demand *(Increase Affordable Housing Opportunities);* Housing opportunities reflect emerging needs, changing demographics and are aligned with redevelopment projects, economic development objectives and sustainability goals *(Address Emerging and Current Needs and Changing Demographics)*
	Rental Rehabilitation	Low	Low- and moderate-income renters; low-income landlords; residents of low- income neighborhoods that are redeveloping or in transition; public housing residents	Inventory of rental units and vouchers expanded to meet increased demand *(Increase Affordable Housing Opportunities);* Housing opportunities reflect emerging needs, changing demographics and are aligned with redevelopment projects, economic development objectives and sustainability goals *(Address Emerging and Current Needs and Changing Demographics)*
	Down Payment Assistance	High	Low- and moderate-income residents who are "buyer ready"; first responders (fire, police, etc.)	Increased homeownership opportunities and support for long term affordability and accessibility for current homeowners. *(Increase Affordable Housing Opportunities)*
	Homebuyer Training & Counseling	High	Low- and moderate-income homebuyers; current renters	Increased homeownership opportunities and support for long term affordability and accessibility for current homeowners. *(Increase Affordable Housing Opportunities)*

D. Budget

D1. Describe the Proposed Budget for this Activity. Please explain all budgeted expenses including contractual services, personnel services, commodities, and capital outlay. Also explain what the CDBG funds will be used for. Also explain the effect of not receiving any or only a portion of a CDBG allocation has on the project budget.
Homewise expects to make about 100 home improvement loans in the coming year with an average loan size of $20,030 for a total activity budget of $2,003,000. The budget represents the total amount of home improvement loans, including amortizing loans and deferred loans. Amortizing loans are funded out of our Homewise loan fund, which is a combination of equity and borrowed funds that we raise from a variety of sources.

CDBG is one of very few source of funds which may be used for *deferred due upon sale loans*. Homewise will combine amortizing and deferred loan sources when such a loan package results in an affordable payment. However, it is our experience that low income households typically cannot afford any additional monthly payment for a home improvement loan, and thus, their loan must be entirely deferred. Without CDBG funding, Homewise will not be able to assist low and extremely low households in making critical home improvements. Depending on improvement needs, it is anticipated that $100,000 in CDBG funding will provide assistance for between ten to fifteen households.

D.2 Please complete the following table to identify the funding sources and amounts. Indicate total project cost that incorporates the total CDBG request and what funds or services, if any, the sponsor and/or other agencies will contribute. Also enter other ***committed*** funding sources (committed funds are funds available or will be available to fund the Activity during the CDBG Fiscal Year). Please be as accurate as possible. Should your organization be awarded funding, a revised budget (as needed) will become an Addendum to the CDBG Contract.

Type of funding	Source/ amount	*Status: Secured* or Requested	Notes	Totals
Requested CDBG amount				**100,000**
Amortizing Funds	1,003,000	CDFI, NM Bank and Trust, Homewise loan fund	**Secured**	1,003,000
Other Federal Funds	0			
Total of all funding sources				**2,003,000**

D.3 If you are proposing to utilize CDBG funds to pay for staff costs, please list each position title and the percentage of their salary and benefits that will be funded by CDBG. Depending on the Activity, listing this information does not guarantee the position will be funded by CDBG as it may not be eligible.

NOT APPLICABLE

PERSONNEL Position Title	**New (Y/N)**	**% salary & benefits paid for with CDBG**

E. Performance Measurement System/Work Plan

CDBG/ Work Plan - FY 2017-2018

Provide the performance measurement goals, objectives and outcomes for your proposed CDBG project. Please refer to Exhibit B at the end of this document. Based on these measurements, attach a Work Plan that describes the goals, objectives and outcomes in greater detail and be:

(B) Specific
(C) Measurable
(D) Achievable
(E) Results-orientated
(F) Time bound

Homewise/CDBG Work Plan - FY 2017-2018
CDBG Outcome Performance Measurement System
Goal: Provide homeowner rehabilitation programs, energy-efficiency upgrades, and accessibility retrofits to low income homeowners in order to increase homeownership opportunities and support for long term affordability and accessibility for current homeowners.
Objective: Provide Decent Housing (DH)
Outcomes: Affordability
Indicators:

	Annual Goal	**Qtr 1 (July-Sept)**	**Qtr 2 (Oct-Dec)**	**Qtr 3 (Jan-Mar)**	**QTR 4 (Apr-June)**
CDBG Home Improvement Loans					
# CDBG Home Improvement Loans	10	3	2	2	3
$ CDBG Home Improvement Loans	$100,000	30,000	$20,000	$20,000	$30,000
Average size loan	$10,000				

A2. Why is this Activity needed? Does it address a gap? Describe the degree of need, or the severity of a problem including cause, extent, location, frequency and duration that will be addressed by the project. Provide a description of service gaps the activity fills in the community. Additionally, supply data, such as demographics, reports and/or other information supporting your information and proving the need exists. **(Attach additional pages, if necessary)**

Homewise is seeking CDBG funding for home improvement loans that make home improvements feasible for low income homeowners. Historically, lower income homeowners have not had adequate access to credit, capital, and financial services; the economic downturn exacerbated this gap as property values fell and incomes stagnated. For home improvement, access to fixed rate, fixed term loans is severely limited.

There are three main barriers to home improvement loans for low income homeowners:

Equity: Most banks limit their Home Equity and Home Equity Loan of Credit (HELOC) loans to a maximum loan to value ratio of 80%. That means that only borrowers with starting equity well above 20% will be able to borrow from a traditional bank source. This equity problem was exacerbated by the housing downturn as properties lost value and equity evaporated.

Affordability: Many low income homeowners lack sufficient income to manage an additional monthly payment. This problem is exacerbated when owners resort to high-interest credit cards or contractor-provided financing to pay for needed repairs.

Fixed Rates: Fixed rate loans for home improvement are hard to come by, especially without significant equity in the home. When owners use variable interest-rate loans (such as credit cards or adjustable rate HELOCs), they run the risk of facing future payments that are unaffordable and that could put them into a destabilizing financial position.

In the face of these obstacles, homeowners typically face two unpleasant choices; defer maintenance or over-extend themselves. When owners defer maintenance, their home repair problems tend to worsen and become even more expensive. Deferred maintenance also erodes the value of the property, further eating away at the owner's net assets and potentially causing a deleterious effect on the surrounding properties. If owners feel they can no longer defer the repairs, they may become over-extended financially because they resort to expensive loan options. This can start a downward cycle that threatens their long term financial security and can even lead them into foreclosure.

The need for CDBG home improvement loan options can be seen in data from the Home Mortgage Disclosure Act (HMDA) for Santa Fe County. In 2014, HMDA data shows there were 279 applications for home improvement loans for owner-occupied single family homes but 41% of these applications were denied. In fact, more loans

were denied (113) than originated (92). One of the primary reasons for denial was Debt-to-Income ratio, which was cited as the primary denial reason in over 30% of the applications. Collateral (not having enough equity) was cited in 8% of the denials. When income is limited, CDBG funds are a critical source of financing, since they are one of only two sources (the other being AHTF funds) Homewise can access that can be deferred until the owner resells the home.

2015 Data from the U.S. Census Bureau also points to the need for home improvement lending. In the City of Santa Fe, there are an estimated 12,270 owner-occupied homes that were built in 1989 or earlier, representing 64% of all owner occupied housing units. Since most major home systems have a useful life that is no more than 30 years (and is often less), these homes are likely to be in need of significant repair and upgrade. In addition, almost 40% of owner-occupants have household incomes at or below $50,000, which is roughly 80% of the Median Family Income for Santa Fe. These families are the most likely to need deferred CDBG financing to lower or eliminate the monthly payment associated with home improvement financing.

Homewise uses home improvement loans to create a positive impact for Santa Fe owners and the wider community in three ways:

1. Home improvement loans allow owners to make necessary repairs as well as energy and water saving improvements while maintaining an affordable total housing payment. Improvements that reduce water and energy usage also help reduce owners' utility costs, further improving their financial strength.

2. Affordable home improvement loans help low income homeowners avoid more costly repairs in the future and maintain the value of their home. For most owners, particularly low income owners, the home is their most significant financial asset. Protecting the value of that home therefore protects the family's main source of wealth.

3. Financing repair and improvement projects helps enhance the aging housing stock in Santa Fe, helping to stabilize older neighborhoods. This helps the homeowner directly but also surrounding property owners. Deferred exterior maintenance can create a visual blight in a neighborhood and undermine the value of surrounding properties. In addition, when homes with significant deferred maintenance are eventually resold, the deflated price creates low comparable sales that have a detrimental effect on the evaluations of nearby homes.

Over its thirty-one year history, Homewise has been helping homeowners make improvements that enhance the health, safety and comfort of their homes while reducing their utility bills and improving the community's housing stock. Continued CDBG funding is an important tool that will allow Homewise to provide for low income Santa Feans.

CITY OF SANTA FE
COMMUNITY DEVELOPMENT BLOCK GRANT (CDBG)
PROPOSAL SCORE SHEET / Bid Number '17/22/RFP

Name of Applicant/Project: Homewise - DPA (CDBG)

Amount Requested: $ 200K.

Evaluation Criteria	Weighted Value	Evaluation Points 1 thru 5	Total Score	Max Score
Activity to be funded • Why needed? Does it address a gap? • Steps/phases to complete the activity • Who is served? • #s proposed to be served	20	x 4	80	100
National Objective Compliance • Benefits low/moderate income persons/households? • Prevents slum/blight • Does the activity serve residents Citywide or a Low to Moderate Income (LMI) Area (i.e. Census Tract)?	20	x 4	80	100
Consolidated Plan Compliance • Does the application demonstrate that it meets Consolidated Plan priorities?	10	x 4	40	50
Budget • Is proposed budget realistic? • Are other funding sources secured?	10	x 5	50	50
Performance Measurement/Work Plan • Are performance measurements, outcomes and proposed outcomes well presented? Realistic? Well-supported in the application? • Does the applicant have the administrative capacity to carry out the activity to be funded?	20	x 5	100	100
		Total Points	350	**400**

CDC Evaluator Name

Signature

02/14/17
Date

CITY OF SANTA FE (CSF)
NON-DISCLOSURE AND CONFLICT OF INTEREST STATEMENT

REQUEST FOR PROPOSAL #'17/22/P

EVALUATOR NAME: John A. Padilla.

CSF policy is to prevent personal or organizational conflict of interest, or the appearance of such conflict of interest, in the award and administration of CSF contracts and Purchase Orders.

I, John A. Padilla, the undersigned, hereby certify that the following statements are true and correct and that I understand and agree to be bound by commitments contained herein.

I am acting at the request of CSF as a participant in the evaluation of *offers/ proposals* received in response to the *Request for Offers/ Request for Proposals,* entitled and/ or numbered
I am acting of my own accord and not acting under duress. I am not currently employed by, nor am I receiving any compensation from, nor have I been the recipient of any present or future economic opportunity, employment, gift, loan, gratuity, special discount, trip, favor, or service in connection with any *offer/ proposal* or involved *Offeror/Proposer* in return for favorable consideration. I have no preconceived position on the relative merits of any of the *offers/ proposals* nor have I established a personal preference or position on the worth or standing of any *Offeror/ Proposer* participating in this action. CSF policy is to prevent personal or organizational conflict of interest, or the appearance of such conflict of interest, in the award and administration of CSF contracts, including, but not limited to contracts for professional services, agreements with consultants and Purchase Orders.

I hereby certify that to the best of my knowledge and belief, no conflict of interest exists that may diminish my capacity to perform an impartial, technically sound, objective review of this proposal(s) or otherwise result in a biased opinion or unfair competitive advantage.
I agree not to disclose or otherwise divulge any information pertaining to the contents, status, or ranking of any *offer/ proposal* to anyone other than the team leader or other evaluation team members. I understand the terms and "disclose or otherwise divulge" to include, but are not limited to, reproduction of any part or any portion of any *offer/ proposal,* or removal of same from designated areas without prior authorization from the evaluation team leader. I agree to perform any and all evaluations of said *offers/ proposals* in an unbiased manner, to the best of my ability, and with the best interest of CSF paramount in all decisions.
I agree to return to CSF Purchasing Department all copies of proposals, as well as any abstracts, upon completion of the evaluation.

12/14/17

SIGNATURE AND DATE:

COPY

Cover Page

City of Santa Fe Community Development Block Grant Program FY 2017-2018	
Name of Nonprofit Organization:	Homewise, Inc.
Name of Executive Director:	Michael Loftin
Name of Board President:	Teresa Leger de Fernandez
Name, Contact Information (Address, Phone, and Email) of Person Submitting Request (Fiscal Agent if appropriate):	Laura Altomare, Director of Communications and Development 1301 Siler Road, Building D, Santa Fe NM, 87507 505-955-7039 laltomare@homewise.org
Amount Requested:	$200,000
Program Name or Service being requested for Funding:	Home Purchase Down Payment Assistance for Clients Under 80% AMI

Brief Program or Service Description:

Homewise is seeking CDBG funding to assist families and individuals whose incomes are under 80% AMI with down payment assistance for their home purchase. This effective tool helps potential home buyers bridge the gap between their purchasing power and current home prices in Santa Fe. Dedicated down payment assistance helps make homeownership possible for low income Santa Feans.

Check which Category Describes your organization:

8. Private Non-Profit X
9. For Profit
10. Public Agency
11. Government Agency

DUNS or CAGE #	016268406
Business Registration #	16-00063137
Tax ID #	85-0346325
State CRS #	02-062377-00-1

Check One: X Previous Recipient

☐ New Applicant

Funding Categories to be Addressed (Circle one):

XX Housing

Public Facility

Public Service

Project Proposal Summary
(If funded, the following will be written into the contract Scope of Services with Accomplishment Levels along with details provided in Section A)

Activity Name: Home Purchase Down Payment Assistance for Clients Under 80% AMI

Brief Summary of Activity:
Homewise is seeking CDBG funding to assist families and individuals whose incomes are under 80% AMI with down payment assistance for their home purchase. This effective tool helps potential home buyers bridge the gap between their purchasing power and current home prices in Santa Fe. Dedicated down payment assistance helps make homeownership possible for low income Santa Feans.

Amount of CDBG funding requested for Activity	$ 200,000
Total budget of Activity	$ 3,500,000

To the best of my knowledge and belief, all data in this application is true and correct. If funded, I certify that the Applicant Organization is willing and able to adhere to the polices and procedures specified by the City of Santa Fe and all applicable program regulations of the US Department of Housing and Urban Development. Further, I understand there is not an agreement until the City of Santa Fe and the individual authorized to execute contracts on behalf of the Applicant Organization has signed the contract.

Authorized Signature *(sign in blue ink)* Title Date

CDBG funds can be used for specific Eligible Activities as outlined in the Overview. Select one type of Eligible Activity category that best describes your Project.

Type of Eligible Activity (check one)

Activities Related to Housing	X
Other Real Property Activities	
Public Facilities/Improvements	
Public Service	

Section A: Activity to be funded

A.1 Briefly describe the Activity you are requesting to fund with CDBG. This will help determine eligibility.
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SEE ATTACHED

A.3 If applicable, what steps or phases will be taken to complete the Activity (provision of services, engineering/design, advertising, bidding, contract award, construction, etc.)?
Homewise is equipped to begin deploying funds immediately upon receipt and will complete the Activity by creating new homeowners with down payment assistance over the course of the year.

A.4 Describe the population that the Activity will serve and how this population will be served. Describe the outreach and recruitment activities which will be conducted to make the proposed activity services known and accessible to the targeted population. Please include where these outreach and recruitment activities will take place.
All CDBG funds received from this application will be used to assist Santa Feans with household incomes under 80% AMI to become homeowners. The below demographics from the three previous CDBG grants indicate the population served with these funds.

Down Payment Assistance Loans for Home Purchase	FY 14-15 CDBG Grant (07/01/2014 to 06/30/2014)	FY 15-16 CDBG Grant (07/01/2015 to 12/31/2015)	FY 16-17 CDBG *Grant to* date (07/01/2016 to 12/31/2016)	Total	% of total
Income <30% AMI	0	0	0	0	0%
Income 30-50% AMI	4	1	2	7	19%
Income 51-80% AMI	9	12	9	30	81%
Total	13	13	11	37	
# of households headed by female	7	3	5	15	41%

# Hispanic households	10	9	8	27	73%
First Time Buyers	12	12	9	33	89%

The Homewise marketing and outreach strategy is a multi-faceted plan that leverages community and business partnerships, public relations, client testimonials, events, advertising, sales collateral, direct mail, website and e-marketing, social media, and brand management. We take care to ensure that materials are impactful and accessible, consistent in design and message, with clear and inviting language. All marketing and outreach activities are aligned to meet the goals of effectively communicating the benefits of Homewise services to our target audience and upholding our reputation in the community.

Homewise's Business Campaign for Homeownership is another successful strategy by which we work with local businesses to deliver presentations and materials at the workplace. Through this campaign, now serving over 200 local businesses, employees learn of the Homewise Home Purchase services including free financial literacy and homebuyer education classes in Spanish and English, individual one-on-one financial counseling services, real estate sales services and low-interest fixed financing for home purchase. Our business partners make the process easier for the employees by creating a comfortable and convenient starting point during work hours.

A.5 Estimate the number of total persons / households that will benefit from the CDBG funded portion of this Activity: (Fill in Households OR Persons depending on the type of Activity you are providing).

Total number of clients you anticipate serving:		
Households: 15-20	**OR**	Persons:

A.6 Use the following Table 1 to break out the number of persons you <u>anticipate</u> serving at the low (30-50% AMI) and very low-income (< 30% AMI) levels and the type of client (Refer to overview of CDBG program for the most recent income amounts). Along with income, please anticipate the number of clients that are severely disabled adults, homeless persons, abused children, battered spouses, and illiterate adults, persons with AIDS, migrant farm workers, and elderly. (All of these clients fall under the presumed benefit categories as defined by CDBG and therefore, all under low or extremely low income). This would apply mainly to Public Service or Public Facilities/Improvements Activities.

Extremely Low Income (<30% AMI)	Low Income (31-50%)	Moderate Income 51-80%	Illiterate adults	Abused children	Severely Disabled Persons	Migrant Farm Workers	Elderly	Persons with AIDS	Homeless Persons
1	5	14	0	0	0	0	2	0	0

Table 1

A.7 Use the following Table 2 to breakout the number of households you anticipate serving at the income levels listed. (Refer to the 2016 AMI *table on pg. 18 for the most recent income amounts*). This would apply mainly to CDBG funding for housing projects such as Down Payment Assistance and Rehabilitation Activities.

Extremely Low Income (<30% AMI)	Low Income (31-50%)	Moderate Income (51-80%)	Non-low Moderate Income (81-100%)	Female Head of Household
1	5	14	0	12

Table 2

A.8 CDBG funded construction activities must be in compliance with local land use plans and zoning. Explain how the proposed activity conforms to local plans and zoning ordinances. Provide a copy of the page(s) of resource document(s), pertinent sections, and page(s). This only applies to projects where the CDBG funds will used for the actual construction, not acquisition.
NOT APPLICABLE

A.9 Please describe the organization in terms of its administrative capacity and its qualifying experience and length of experience with activities or projects similar to the proposed Activity. Include purpose, goals, programs, activities, clients, and accomplishments, if any, in the area of activity for which funding is requested. Give examples of and list experience.

Homewise, founded in 1986, began its home ownership program in 1993. Since that time 3,592 (as of 10/31/16) families and individuals have purchased homes through Homewise. We have loaned $391,092,708 for home purchase.

Homewise has been recognized for our effectiveness toward our mission of supporting homeowners to achieve financial security through homeownership. Homewise's efficiency and effectiveness is audited and reviewed by various funders including the City of Santa Fe,

NeighborWorks® America, the U.S. Treasury's Community Development Financial Institutions Fund (the CDFI Fund), Aeris through the Aeris™ Rating system of CDFIs, and our private auditors. Historically, these audits have consistently verified our effectiveness and our capacity to manage the organization to high standards of efficiency and accountability.

The Homewise staff responsible for Home Purchase services has many years of experience in financial counseling, homebuyer education, real estate sales, and lending and has created a seamless process for homeowners seeking these services. That team is backed by a skilled accounting and finance staff and a marketing department with expertise in messaging and media appropriate for these services. The Homewise staff has administered several previous CDBG allocations for home purchase lending.

The staff directly responsible for Home Purchase lending includes:

Mark Vanderlinden, Chief Lending Officer, has over 30 years of experience in mortgage lending and operations management at Fannie Mae, Federal Home Loan Bank of Atlanta and the New Mexico Mortgage Finance Authority. He is responsible for managing Home Purchase Lending services.

Sheryl Kassetas, Mortgage Loan Originations Manager, Gina Smyer, Mortgage Loan Closing Manager, and Phil Vargas, Mortgage Loan Underwriter, oversee the underwriting, origination and closing of home purchase loans, including a team of 10 Loan Officer and Loan Processing staff members.

Lisa Wilson, Chief Financial Officer, Robin Kvech, Controller, Sarah Geisler, Senior Business Analyst, and Kate Preteska, Business Analyst, use their combined corporate accounting, business management and project and records management to oversee reporting and tracking of all government contracts awarded to Homewise.

Laura Altomare, Director of Communications and Development, and Rachel Silva, Marketing Manager, bring their seasoned marketing and communications expertise to develop the Homewise messaging and media strategies that will reach the target market for the home purchase services.

Michael Loftin, Chief Executive Officer, has 40 years of experience in housing and community development. He oversees Homewise's programs and services from strategy development to implementation and operation.

A.10 Briefly describe your organizations experience in government contract administration, and knowledge of federal regulations governing acquisition, procurement, equal employment opportunity, and labor standards.

Homewise has administered and currently administers numerous programs under government contracts, including prior CDBG allocations, HOME funding from the New Mexico Mortgage Finance Authority, U.S. Department of Housing and Urban Development, City of Santa Fe Affordable Trust Fund, U.S. Department of Treasury CDFI Fund, and NeighborWorks® America.

The Homewise finance department uses a sophisticated reporting and tracking system to meet the needs of government contract administration. The system's components include our proprietary client management database, which integrates information with our loan origination and loan servicing systems to provide us with access to all the information we need to meet compliance and reporting requirements.

B. National Objective Compliance

1. Benefits *Low/ Moderate Income* persons/households by:	
Area Benefit (eligible area) (LMA)	
Limited Clientele (LMC)	
Housing Activities (LMH)	XX
Job Creation or Retention (LMJ)	

B.2 Is the service area city wide: (XX) yes ( )no
If no, fill out B.3.

B.3 If an activity is based on an area benefit, identify the Census Tract(s) and Block Group(s) that will be served. Make sure to read the Overview for a clear understanding of the requirements of an area benefit. Attach a map of the area.
NOT APPLICABLE

Census Tract	Block Group	Total Population	Low/Mod Income Population	% Low/ Mod Income
Total				

B.4 Explain fully how the proposed project meets the CDBG National Objective selected above. Provide substantiating documentation supporting the claims. Refer to Overview for more detail.

The demographics from the CDBG Grant Agreements for prior fiscal years show the numbers of homeowners served with CDBG funds for down payment assistance loans with incomes below 50% and 80% AMI. The majority of homeowners receiving down payment assistance funds from CDBG are employed in Santa Fe and have an income under 80% AMI. The majority are Hispanic and nearly all are first time homebuyers.

Down Payment Assistance Loans for Home Purchase	FY 14-15 CDBG Grant (07/01/2014 to 06/30/2014)	FY 15-16 CDBG Grant (07/01/2015 to 12/31/2015)	FY 16-17 CDBG Grant to date (07/01/2016 to 12/31/2016)	Total	% of total
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# Hispanic households	10	9	8	27	73%
First Time Buyers	12	12	9	33	89%

C. Consolidated Plan Compliance

The City of Santa Fe provides guidance in its 2013-2017 Consolidated Plan on funding uses, whether Federal, State, City, or Private. In accordance with federal regulations, each project must be consistent with the priorities outlined in the City's Consolidated Plan. (See Consolidated Plan on City website) Mark the **one priority** that the proposed project will meet.

P-25 Priority Needs

Check	Priority Need Name	Priority Level	Population Served	Goals Addressed
	Rental Vouchers	High	Extremely low-income renters; people at risk of being homeless; persons with disabilities; homeless youth; veterans; elderly; families in transition; persons with HIV/AIDS and their families; public housing residents; mentally ill; chronic substance abusers; victims of domestic violence	Reduced rate of cost burden and corresponding drop in poverty rate for homeless households and those in danger of becoming homeless. *(Increase Opportunities for At Risk Populations);* Inventory of rental units and vouchers expanded to meet increased demand *(Increase Affordable Housing Opportunities)*
	Emergency Shelter (note could be classified as Public Service which is restricted in allocation amount)	High	Extremely low-income residents; chronic homeless; homeless youth; veterans; families in transition; mentally ill; chronic substance abusers; victims of domestic violence	Reduced rate of cost burden and corresponding drop in poverty rate for homeless households and those in danger of becoming homeless. *(Increase Opportunities for At Risk Populations)*
	Support Services for Homeless or People at Risk of Homelessness (note could be classified as Public Service which is restricted in allocation amount)	High	Extremely low-income renters; people at risk of being homeless; persons with disabilities; homeless youth; veterans; elderly; families in transition; persons with HIV/AIDS and their families; public housing residents; mentally ill; chronic substance abusers; victims of domestic violence	Reduced rate of cost burden and corresponding drop in poverty rate for homeless households and those in danger of becoming homeless. *(Increase Opportunities for At Risk Populations)*
	Refinancing Services and Support for Current Homeowners	High	Low-income homeowners; homeowners in risk of foreclosure; homeowners in substandard housing	Reduced rate of cost burden and corresponding drop in poverty rate for homeless households and those in danger of becoming homeless. *(Increase Opportunities for At Risk Populations);* Increased homeownership opportunities and support for long term affordability and accessibility for current homeowners. *(Increase Affordable Housing Opportunities)*

Priority Needs (cont.)

Check	Priority Need Name	Priority Level	Population Served	Goals Addressed
	Homeowner Rehabilitation Programs, Energy-efficiency Upgrades, Accessibility Retrofits	High	Low- and moderate-income homeowners; residents in redeveloping or transitioning neighborhoods; homeowners living in aging or substandard housing stock; seniors who need to "age in place;" people with disabilities	Increased homeownership opportunities and support for long term affordability and accessibility for current homeowners. *(Increase Affordable Housing Opportunities);* Housing opportunities reflect emerging needs, changing demographics and are aligned with redevelopment projects, economic development objectives and sustainability goals *(Address Emerging and Current Needs and Changing Demographics)*
	Construction of affordably-priced homes for homeownership	Low	Low- and moderate-income homebuyers and current renters; local workforce	Increased homeownership opportunities and support for long term affordability and accessibility for current homeowners. *(Increase Affordable Housing Opportunities)*
	Fair Housing Outreach	High	Low- and moderate-income renters; low-income landlords; persons with disabilities; Spanish speakers; large families; general public	Housing opportunities reflect emerging needs, changing demographics and are aligned with redevelopment projects, economic development objectives and sustainability goals *(Address Emerging and Current Needs and Changing Demographics)*
	Diversity of Housing Types	Low	Low- and moderate-income renters; seniors; small households; entrepreneurs; aging veterans; entrepreneurs and other self-employed	Housing opportunities reflect emerging needs, changing demographics and are aligned with redevelopment projects, economic development objectives and sustainability goals *(Address Emerging and Current Needs and Changing Demographics)*
	Non-Housing Community Facilities and Services	High	Low- and moderate-income residents; residents in redeveloping or transitioning neighborhoods; youth	Housing opportunities reflect emerging needs, changing demographics and are aligned with redevelopment projects, economic development objectives and sustainability goals *(Address Emerging and Current Needs and Changing Demographics)*

Priority Needs (cont.)

Check	Priority Need Name	Priority Level	Population Served	Goals Addressed
	Provision of Rental Units and Support Services for LI/ VLI Renters	High	Low- and very low-income renters; persons transitioning out of homelessness; renters in need of support services; public housing residents	Inventory of rental units and vouchers expanded to meet increased demand *(Increase Affordable Housing Opportunities);* Housing opportunities reflect emerging needs, changing demographics and are aligned with redevelopment projects, economic development objectives and sustainability goals *(Address Emerging and Current Needs and Changing Demographics)*
	Rental Rehabilitation	Low	Low- and moderate-income renters; low-income landlords; residents of low- income neighborhoods that are redeveloping or in transition; public housing residents	Inventory of rental units and vouchers expanded to meet increased demand *(Increase Affordable Housing Opportunities);* Housing opportunities reflect emerging needs, changing demographics and are aligned with redevelopment projects, economic development objectives and sustainability goals *(Address Emerging and Current Needs and Changing Demographics)*
XX	Down Payment Assistance	High	Low- and moderate-income residents who are "buyer ready"; first responders (fire, police, etc.)	Increased homeownership opportunities and support for long term affordability and accessibility for current homeowners. *(Increase Affordable Housing Opportunities)*
	Homebuyer Training & Counseling	High	Low- and moderate-income homebuyers; current renters	Increased homeownership opportunities and support for long term affordability and accessibility for current homeowners. *(Increase Affordable Housing Opportunities)*

D. Budget

D1. Describe the Proposed Budget for this Activity. Please explain all budgeted expenses including contractual services, personnel services, commodities, and capital outlay. Also explain what the CDBG funds will be used for. Also explain the effect of not receiving any or only a portion of a CDBG allocation has on the project budget.
Homewise combines CDBG down payment assistance with amortizing funds, the buyer's cash contribution and when necessary and available, other sources of down payment assistance. For example, such sources may include funds from Federal Home Loan Bank, Teacherwise, and Homewise funded down payment assistance (available on Homewise built homes). The lending and finance staff have experience in managing the various sources of down payment assistance to determine which buyers are eligible for which sources and to maximize the impact of each source. Many of the amortizing loans in first position are subsequently sold to Fannie Mae. Homewise retains servicing on those loans to ensure continuity and a high level of customer services. Loans that are not eligible for Fannie Mae are held in Homewise's lending portfolio and we raise capital each year for that loan fund. Homewise buyers are required to make a minimum 2% cash contribution toward the down payment and closing costs. Our average CDBG down payment assistance loan size is $10,000. With a $200,000 CDBG award, we could help 20 new low income individuals and families become homeowners. With a smaller award, our average loan size would remain the same, resulting in fewer low income individuals and families assisted by the award. Sources of funds that can be used for down payment assistance are very limited, making CDBG all the more crucial to our ability to help low income families achieve homeownership.

D.2 Please complete the following table to identify the funding sources and amounts. Indicate total project cost that incorporates the total CDBG request and what funds or services, if any, the sponsor and/or other agencies will contribute. Also enter other ***committed*** funding sources (committed funds are funds available or will be available to fund the Activity during the CDBG Fiscal Year). Please be as accurate as possible. Should your organization be awarded funding, a revised budget (as needed) will become an Addendum to the CDBG Contract.

Type of funding	Source/amount	Status: Secured or Requested	Notes	Totals
Requested CDBG amount	***200,000***	**requested**		**200,000**
Other Federal Funds	-			
First Mortgage Funds	3,130,000	Fannie Mae, Homewise loan fund	**Secured**	3,130,000

Other down payment	100,000	Federal Home Loan Bank, Teacherwise, Homewise deferred funds	**Secured**	100,000
Buyer Contribution	70,000	Buyer cash contribution	**Secured**	70,000
Total of All Funding Sources				3,500,000

D.3 If you are proposing to utilize CDBG funds to pay for staff costs, please list each position title and the percentage of their salary and benefits that will be funded by CDBG. Depending on the Activity, listing this information does not guarantee the position will be funded by CDBG as it may not be eligible.

NOT APPLICABLE

PERSONNEL Position Title	**New (Y/N)**	**% salary & benefits paid for with CDBG**

E. Performance Measurement System/Work Plan

CDBG/ Work Plan - FY 2017-2018

Provide the performance measurement goals, objectives and outcomes for your proposed CDBG project. Please refer to Exhibit B at the end of this document. Based on these measurements, attach a Work Plan that describes the goals, objectives and outcomes in greater detail and be:

(B) Specific
(C) Measurable
(D) Achievable
(E) Results-orientated
(F) Time bound

Homewise/CDBG Work Plan - FY 2017-2018
CDBG Outcome Performance Measurement System
Goal: Provide Down Payment Assistance to low income residents of Santa Fe in order to increase homeownership opportunities and support long term affordability and accessibility.
Objective: Provide Decent Housing (DH)
Outcomes: Affordability
Indicators:

	Annual Goal	Qtr 1 (Jul-Sept)	Qtr 2 (Oct-Dec)	Qtr 3 (Jan-Mar)	Qtr 4 (Apr-Jun)
CDBG Home Purchase amortizing and deferred mortgages					
# CDGB second mortgages closed	15-20	5	5	5	5
$ CDBG second mortgages closed	200,000	50,000	50,000	50,000	50,000
Average loan size	10,000	10,000	10,000	10,000	10,000
Counseling to prospective loan clients					
# of all new customers receiving one-on-one counseling/pre-qualification (new intakes)	780	195	195	195	195
# of all customers attending financial literacy or homebuyer education classes	600	150	150	150	150

A.2 Why is this Activity needed? Does it address a gap? Describe the degree of need, or the severity of a problem including cause, extent, location, frequency and duration that will be addressed by the project. Provide a description of service gaps the activity fills in the community. Additionally, supply data, such as demographics, reports and/or other information supporting your information and proving the need exists. **(Attach additional pages, if necessary)**

Homeownership is a uniquely powerful tool to help families build long-term financial security, while also helping to build a vibrant community with a strong economy. Owning a home helps families build wealth simply by making an affordable housing payment each month. It also helps attract and retain residents who want to make Santa Fe their home. Homewise uses tools such as CDBG-funded down payment assistance to help alleviate the obstacles that may prevent potential residents from owning a home in Santa Fe.

Why Homeownership Matters for Santa Fe

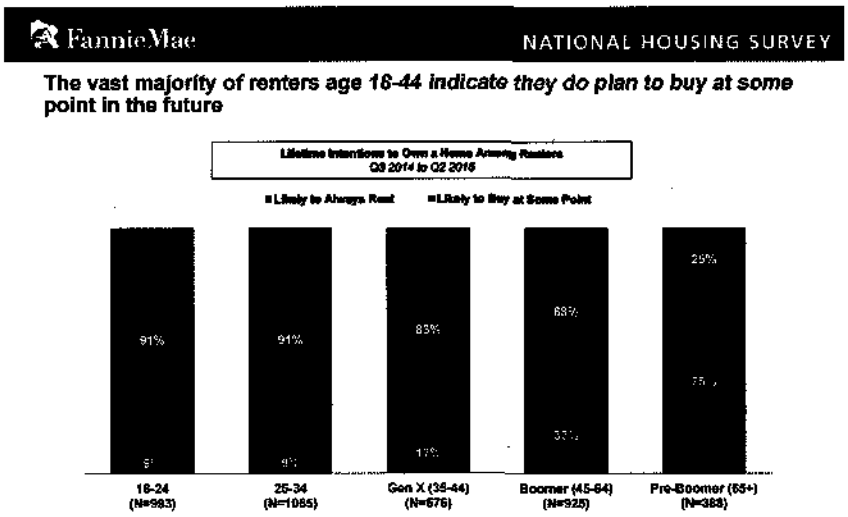
Compared to the peak of home prices just a few years ago, Santa Fe is more affordable for would-be homeowners. But obstacles still remain, and those obstacles put a strain on the community's efforts to remain economically strong. Santa Fe has a long tradition of supporting homeownership, and by continuing that tradition, we can:

- Attract and retain younger Santa Feans
- Capture in-commuters (and their spending)
- Maintain Santa Fe's strong homeownership rate

Attract and Retain Younger Santa Feans

As the City of Santa Fe noted in its *Final Consolidated Plan 2013-2017,* in the past decade Santa Fe experienced "a shift in household composition toward older, smaller households without children. The city has far fewer residents under age 55: In 2000, 63 percent of the city's residents were younger than 55; this has dropped to 50 percent and been offset by a gain in adults 55 and older."

Attracting and retaining younger Santa Feans is an important part of building the community's vibrancy and strengthening the economy. Fannie Mae recently released a survey indicating that the vast majority of renters, especially young renters, aspire to own a home. This refutes the common narrative that millennials have soured on homeownership. Fannie Mae's *National Housing Survey Topic Analysis (August 2015)* examined the attitudes of renters about homeownership



and found that 91% of renters age 18 to 34 plan to buy a home at some point in the future.

The survey also showed that a substantial majority of renters age 25 to 34 say that owning makes more sense than renting from a financial perspective and agree that owning makes more sense than renting from a lifestyle perspective. In a separate analysis, Fannie Mae noted that the number of 25-34 year old homeowners stabilized in 2014 after years of decline and wrote, "Strong population growth could soon generate increases in the number of young homeowners, even without much improvement in homeownership rate trends." (*Fannie Mae Housing Insights, Volume 5, Issue 4*). Based on their survey, Fannie Mae predicts an upward trend in the number of millennial homebuyers.

Homewise's own data verifies that young people are interested in achieving homeownership in Santa Fe. A review of the past ten years'-worth of client data shows that half of our new clients each year are under 35 years old. That percentage has remained steady even through the housing boom years and the housing bust years that followed.

While younger people tend to rent at a higher rate than their older counterparts, they overwhelmingly aspire to own, and they intend to achieve that goal in their futures. If Santa Fe wants the young members of our community to make their futures here, we have to make ownership opportunities available to them.

Capture and Retain In-Commuters

The New Mexico Department of Workforce Solutions estimated that as of 2011, there are 29,140 workers commuting to Santa Fe from elsewhere, compared to just 17,080 workers who live in Santa Fe. This high commuter rate is a drain on the local economy as workers leave the area to spend their paychecks elsewhere. The National Association of Homebuilders estimates that households spend 63% of their incomes where they live.

In its Final Consolidated Plan, the city noted that about a third of the in-commuters would be interested in moving to Santa Fe if they could afford to purchase a single family home. By contrast, less than 10 percent would be interested in moving for an affordable rental opportunity. Providing homeownership opportunities for those who are currently commuting would allow the city to capture the

Economic Potential

9,600

approximate number of commuters who would be interested in home purchase in Santa Fe

x

$30,000

approximate local spending for a typical Santa Fe family (63% of the median income)

=

$302,400,000

potential local spending that could be captured in Santa Fe

spending of those families, and just as importantly, to welcome them home to the community where they currently work.

Maintain the Homeownership Rate

As the Final Consolidated Plan notes, the homeownership rate between 2000 and 2010 increased slightly even while prices increased dramatically, affordability suffered and homeownership in the state and nation declined. Maintaining a strong homeownership rate during difficult market conditions was no accident. Homewise believes that the city's long-standing support of affordable home purchase opportunities has played an important role in the enduring strength of homeownership.

Between 2000 and 2010, the number of homeowners in the City of Santa Fe increased by 3,287, pushing the homeownership rate up by just over two percentage points. During that same time period, Homewise used its suite of support tools to create an estimated 1,330 homeowners in the city of Santa Fe, or about 40% of that increase. This figure shows how important it is to have a dedicated strategy to support homeownership using a variety of tools that includes down payment assistance.

Why Homeownership Matters for Families

Housing is a basic human need and for the typical family it is the largest portion of the monthly budget. Whether they rent or own, almost everyone will have a monthly housing cost. Homeownership has the potential to not only meet that basic human need, but also to help owners stabilize their biggest monthly expense and build wealth. Homeownership is a powerful tool for families in that it allows owners to build those assets simply by making an affordable monthly housing payment. This is particularly true for low income and/or low wealth families who would be hard pressed to implement a successful investment strategy on top of paying an ever-increasing monthly rent. By making possible the financial benefits described below to families who start out with very little accumulated assets, homeownership helps to break the cycles of low income *and low wealth.*

Homeownership helps families achieve financial security through three important aspects.

1. Stable monthly payments. Unlike rent, which is subject to inflation and market changes, home purchase locks in principal and interest payment for 30 years. Only taxes and insurance are subject to increase, and these costs make up only a small fraction of the housing payment. Stabilizing a family's biggest monthly expense helps families budget effectively and dedicate more of their funds to long term savings.
2. Automatic Savings Plan. With homeownership, part of each monthly mortgage payment is being paid back to the owner in the form of principal pay down. In essence, this serves as an automatic savings plan for the owners, increasing the owner's net worth each month as the loan is paid down. It is as if the owner has set up an automatic plan that transfers funds each month into a savings account (with the added benefit that this savings account also provides shelter).

3. Appreciation. Even modest appreciation in a home's value has a powerful cumulative effect on a homeowners' wealth because owners earn appreciation on the entire value of their home, not just on the cash portion that they invested as a down payment. In contrast, other investment vehicles like stocks and bonds only earn appreciation on the amount of cash that a family can invest. This leverage factor is particularly important for lower income households who lack significant discretionary income to invest in vehicles like stocks and bonds. Their appreciation is built into homeownership and can result in significant wealth creation even with modest growth in home prices.

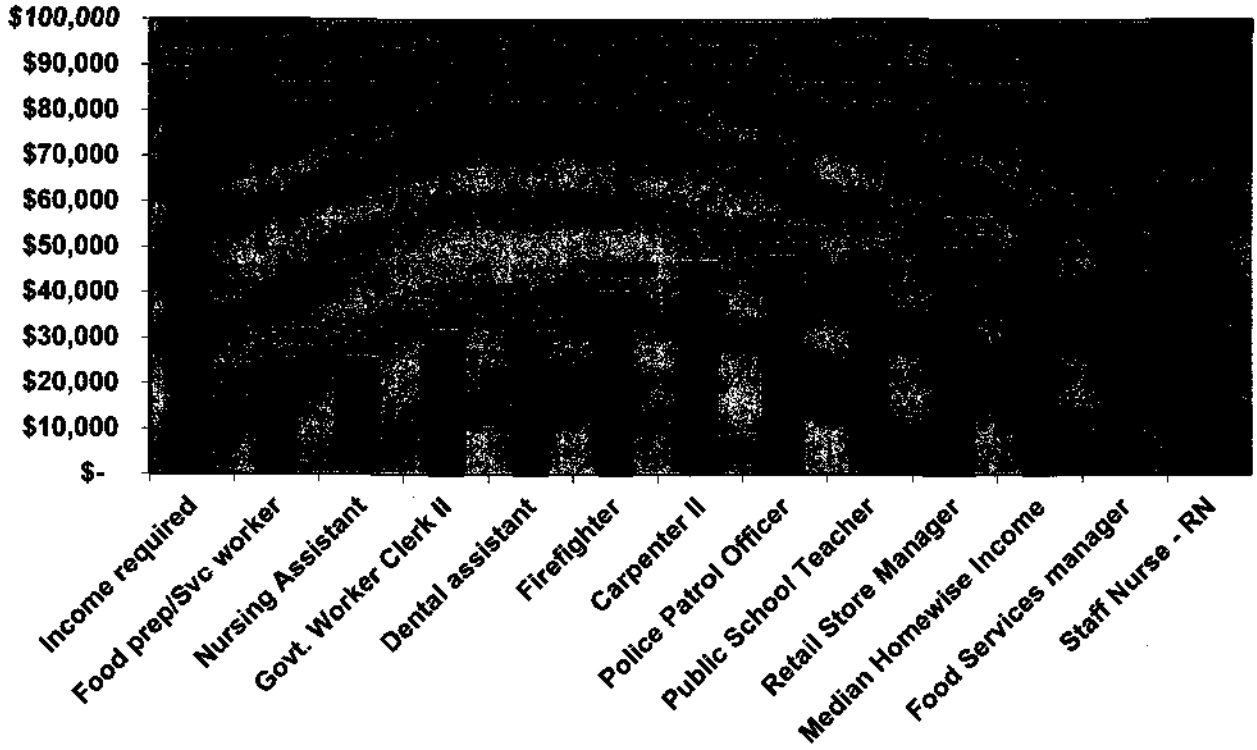
What Stands in the Way of Homeownership?

Homewise finds that three major factors stand in the way of homeownership: credit, savings and affordability. Homewise addresses the first two obstacles with our combination of support services and our innovative mortgage product. We use one-on-one financial coaching and group education to help people improve their credit profiles, reduce debt, and build savings. Our Homewise Mortgage reduces the amount of down payment needed to just 2% of the purchase price without resorting to unsound subprime products or expensive mortgage insurance.

Housing affordability remains a stubborn obstacle in Santa Fe, where prices are high and incomes are stagnant. The Final Consolidated Plan notes that "The median price in the city rose by 65 percent between 2000 and 2010, from $183,000 to $310,000." As of December 31, 2016, the Santa Fe Association of Realtors reported that the median home purchase price in the City was $339,928. As of January 2017, the annual income needed to purchase the median Santa Fe home is about $86,250, well above the median income of the Homewise customer ($55,907). According to Census data, the median income has been virtually flat since at least 2009. Per the Final Consolidated Plan, "The growth in median home values and in median sales prices for both single family homes and condos has far outpaced the growth in income...."

The Homewise Mortgage eliminates the cost of expensive private or FHA insurance for borrowers with less than 20% down payment. This has the effect of increasing purchasing power, but for many families, there remains an affordability gap. Down payment assistance is the tool necessary to fill that gap.

The graph below compares the income needed to purchase the median priced home with the income of several typical professions.



Even a relatively small down payment assistance deferred loan has a big effect on purchasing power by lowering the owner's monthly payment. When the payment is lower, the homebuyer can qualify for the mortgage with a lower income. For example, on a $200,000 home purchase using the Homewise Mortgage, $10,000 in CDBG down payment assistance has the same effect on purchasing power as a 6% increase in salary. And although it is only a one-time expenditure for the City, it has an enduring impact year after year because that mortgage payment savings is locked in for the life of the loan. Even better, the down payment assistance is structured as a deferred loan, which means Homewise will recoup the funds in future years and be able to reuse it for future homebuyers.

Homewise has effectively used down payment assistance from CDBG and other sources to help low income Santa Feans achieve their homeownership goals. These homeowners make a commitment to their community through their home purchase, contributing to the local economy and the vibrancy of the City Different. The city of Santa Fe has as a long tradition of supporting homeownership, a history that has been effective in making opportunities for both existing and new residents of the community. Continuing that tradition with CDBG down payment assistance funds will help the city attract and retain young residents and welcome home those commuters who believe ownership in Santa Fe is out of reach.

CITY OF SANTA FE
AFFORDABLE HOUSING TRUST FUND (AHTF)
PROPOSAL SCORE SHEET / Bid Number '17/TBD/RFP

Name of Applicant/Project: Homewise. DPA. (AHTF)
Amount Requested: $250K.

CRITERIA	Weighted Value	Evaluation Points (1-5)	Total Points	Max. Score
Funding • Leverage amounts from other sources • Operating budget shows evidence of sufficient revenue to administer the proposed program • Secured matching resources	20%	4	80	100
Need/Benefit & Project Feasibility Data driven analysis that shows: • The proposal is responsive to current and future market demand • Income mix, if applicable • Site control • Realistic time frame for completion of funded project/program activities	40%	4	160	200
Affordability • The proposal meets the Affordability Requirements serving households of up to 120% AMI	20%	4	80	100
Demonstrated Capability – Organizational Management • Staff • Organizational Experience • Expertise in type(s) of housing or service(s) proposed • Demonstrated Financial Soundness	20%	5	100.	100
TOTAL	100%		420.	500

EVALUATION POINTS: 1 -- Lowest 5 – Highest

02/14/17

CDC Evaluator Name Signature Date

CITY OF SANTA FE (CSF)
NON-DISCLOSURE AND CONFLICT OF INTEREST STATEMENT

REQUEST FOR PROPOSAL #'17/28/P

EVALUATOR NAME: John A. Padilla.

CSF policy is to prevent personal or organizational conflict of interest, or the appearance of such conflict of interest, in the award and administration of CSF contracts and Purchase Orders.

I, John A. Padilla., the undersigned, hereby certify that the following statements are true and correct and that I understand and agree to be bound by commitments contained herein.

I am acting at the request of CSF as a participant in the evaluation of *offers/ proposals* received in response to the *Request for Offers/ Request for Proposals,* entitled and/ or numbered
I am acting of my own accord and not acting under duress. I am not currently employed by, nor am I receiving any compensation from, nor have I been the recipient of any present or future economic opportunity, employment, gift, loan, gratuity, special discount, trip, favor, or service in connection with any *offer/ proposal* or involved *Offeror/Proposer* in return for favorable consideration. I have no preconceived position on the relative merits of any of the *offers/ proposals* nor have I established a personal preference or position on the worth or standing of any *Offeror/ Proposer* participating in this action. CSF policy is to prevent personal or organizational conflict of interest, or the appearance of such conflict of interest, in the award and administration of CSF contracts, including, but not limited to contracts for professional services, agreements with consultants and Purchase Orders.

I hereby certify that to the best of my knowledge and belief, no *conflict of interest exists that may* diminish my capacity to perform an impartial, technically sound, objective review of this proposal(s) or otherwise result in a biased opinion or unfair competitive advantage.
I agree not to disclose or otherwise divulge any information pertaining to the contents, status, or ranking of any *offer/ proposal* to anyone other than the team leader or other evaluation team members. I understand the terms and "disclose or otherwise divulge" to include, but are not limited to, reproduction of any part or any portion of any *offer/ proposal,* or removal of same from designated areas without prior authorization from the evaluation team leader. I agree to perform any and all evaluations of said *offers/ proposals* in an unbiased manner, to the best of my ability, and with the best interest of CSF paramount in all decisions.
I agree to return to CSF Purchasing Department all copies of proposals, as well as any abstracts, upon completion of the evaluation.

02/14/17

SIGNATURE AND DATE:

2017-2018 AHTF APPLICATION

General Information

Applicant Name(s): Homewise, Inc.

Address: 1301 Siler Rd Building D

Federal Tax ID #:85-0346325

City Business Reg. #: 15-00063137

CRS#: 02-062377-00-1

City/State/Zip Code: Santa Fe, NM 87507

Telephone: 505-955-7039

Project Contact: Laura Altomare

Email Address: laltomare@homewise.org

Amount of Allocation Requested: $ 250,000

Type of Applicant:

☐ Partnership ☐ Corporation ☒ Non-Profit* ☐ Other

* Non-profit must provide proof of non-profit status. This proof includes submittal of current registration as charitable organization with the NM Attorney General's Office, covering the most recent Fiscal Year, or proof of exemption. Information can be obtained online at https://secure.nmag.gov/coros/. Verification should be in the form of the first page of the "NM Charitable Organization Statement."

Project Name: Down Payment Assistance for Home Purchase Customers below 120% AMI

Project Address (if applicable): Homewise, Inc. 1301 Siler Rd Building D

City/State/Zip Code: Santa Fe, NM 87507

Priority Project

Select one of the categories your project falls under:

☐ **Rental Vouchers** - Provide supported rental vouchers (includes access to counseling, health services, case management, and other services) to renters earning less than 50%AMI;

☐ **Emergency Shelters including permanent supported shelter housing** - Development, construction, and preservation of shelter/permanent supported rental facilities, including infrastructure improvements;

☐ **Provision of Rental Units and Support Services for Low Income (up to 50% AMI) and Extremely Low Income Renters (less than 30% AMI)** - Acquisition, conversion, preservation and new construction of tiered income multi-family rental properties; including infrastructure or one-time emergency rental assistance;

☒ **Down payment Assistance/Increase of Ownership Opportunities** - Down payment assistance in the form of soft-second mortgage that "buys down" principal amount of loan to lower monthly payment; Acquisition, conversion, preservation and new construction of homeownership housing;

☐ **Homeowner Rehabilitation Programs, Energy Efficiency Upgrades, Accessibility Retrofits** - Aacquisition, conversion, and preservation of affordable housing that accommodates needs of current householders.

Project Description:

Please provide a narrative of your project. Specifically who will be served, anticipated outcomes, etc. (If needed continue on a separate sheet)

Homewise operates a down payment assistance program as a critical part of our integrated home purchase program. Through this program, we help Santa Fe families overcome their challenges to home purchase, which typically include affordability, down payment, and credit. Down payment assistance is an essential tool we use in that effort and AHTF funds would be used to provide assistance to families earning under 120% of AMI.

Homewise provides down payment assistance in the form of a 0% interest, deferred loan that is due upon sale. The deferred loan lowers the buyer's monthly payment because no monthly payments are required. The loan amount is repaid when the owner sells the home (or otherwise transfers ownership) and those repayments are then revolved to assist future buyers.

Our requested funds of $250,000 would help an estimated 27 homebuyers to achieve their home purchase goals. We will utilize these funds in conjunction with our Homewise mortgage product, which allows us to offer a 30-year fixed rate loan and eliminate mortgage insurance. In addition, our Homewise mortgage lowers the up-front cash required of our buyers compared to other loan

options in the marketplace. The result is a home purchase package that lowers monthly payments, lowers the upfront cash required, and reduces the total interest and mortgage insurance paid over the life of the loan. We use down payment assistance loans for borrowers who still face an affordability barrier and need their monthly payment further reduced. AHTF funds will help us create an additional 27 homeowners who would otherwise be priced out of home purchase.

1.Funding:

How will the AHTF allocation be used for this project? What additional funding sources are secured or will be secured upon receipt of allocation? The City of Santa Fe requires financing from other sources to be committed prior to the release of funds from the AHTF.

AHTF funds will be used for down payment assistance loans for households under 120% of AMI. These loans, ranging in size from $5,000 to $20,000 based on borrower's need, will be at 0% interest and will be due upon sale or refinance. In addition to down payment assistance, Homewise provides amortizing second mortgages to homebuyers that eliminate the cost of mortgage insurance thereby reducing the monthly mortgage payment and maximizing the amount which a homebuyer can borrow. Sources for the amortizing seconds are secured and include grants from the CDFI Fund of the US Treasury Department and NeighborWorks America, as well as loans from a number of sources including the CHRISTUS St. Vincent Regional Medical Center, Santa Fe Community Foundation, Calvert Foundation, religious investors, UBS Bank, Bank of America and New Mexico Bank and Trust.

Leveraging/Matching Requirement:

$3 to $1 Leveraging: for every $1 allocated through the AHTF, at least $3 from other sources will be expected (leveraged funds can include long term mortgages, other sources of grants, owner equity, proceeds from Low Income Housing Tax Credits, or the current value of land); organizational resources should be used to provide $1 of match (See Exhibit A for example)

Briefly Describe:

As shown in the budget following, Homewise expects to leverage each AHTF dollar with $19 dollars and match each AHTF dollar with $3.78 of Homewise matching funds. Leverage will come from the Homewise Mortgage, which includes a first mortgage at 80% of loan to value and is sold to Fannie Mae for permanent funding. In addition, the borrower's cash contribution toward their home purchase also serves as leverage funds. The required match will come from the Homewise amortizing second mortgages, funded by Homewise from sources we have secured. It is the amortizing second mortgage that eliminates the need for mortgage insurance and maximizes the affordability to the homebuyer.

Project Budget and/or Development Pro-Forma: demonstrate use of leveraged and matching funds as well as evidence that operating budget is sufficient to administer the

proposed program/project (please attach documents as well as give brief overview below)

The following summary shows how AHTF funds will be used in a typical home purchase transaction. This sample also demonstrates the leverage and match achieved for each transaction and for the entire project.

Typical Home Purchase Transaction

Average sales price	$ 215,000
Closing costs	$ 6,450
Total Transaction cost	**$ 221,450**

Sources of Funds		**Project Budget for 27 homebuyers assisted**	
First mortgage, sold to FNMA	$ 170,000	$ 4,590,000	leverage
Homewise Amortizing Second mortgage	$ 35,000	$ 945,000	Homewise match
Average Buyer's cash contribution	$ 6,450	$ 174,150	leverage
Down payment Assistance Loan	$ 10,000	$ 250,000	AHTF
Total Home Purchase Financing	**$ 221,450**	**$ 5,979,150**	

Requested AHTF	$250,000	**Ratio**
Total Leverage	$4,764,150	$19 to $1
Total Homewise Match	$945,000	$3.78 to $1

Homewise will fund the operating costs of administering the down payment assistance loan program itself so that the entirety of the award can be deployed as direct assistance to homebuyers. The attached financial documents demonstrate that Homewise has sufficient resources budgeted to administer the project.

2.Need/Benefit & Project Feasibility:

Demonstrate, using data-based analysis, that there is a clear connection between the proposed project/program and adopted Priority(s), and evidence that the proposed project/program meets current and future market demands. Provide narrative below (use additional sheets as necessary):

The City's Five Year Consolidated Plan reflects the following Goal: "Increased homeownership opportunities and support for long term affordability and accessibility for current homeowners." Homewise's down payment assistance loan program immediately furthers this goal by removing key barriers to home purchase and creating additional opportunities for affordable homeownership.

The City's goal reflects the market need for improving housing affordability. According to the Consolidated Plan:

Even with the recent declines in sale prices, the residential housing market in Santa Fe has become less affordable since 2000. The growth in median home values and in median sale prices for both single family homes and condos has far outpaced the growth in income from homeowners and renters. This is especially true for renter households, whose median income increased by only 4 percent between 2000 and 2011. As a result, it has become increasingly difficult for renters who wish to buy a home in Santa Fe to find an affordable property for purchase. This trend is not likely to change in the foreseeable future.

Prospective homebuyers face three main obstacles to homeownership: Affordability, down payment and credit. As the consolidated plan notes, the affordability challenge has persisted despite drops in home prices in recent years. The median price in the city rose 65% between 2000 and 2010 to reach $310,000. The annual income needed to purchase such a home using a typical FHA loan is about $70,328, well above the $53,288 median income of a Homewise homebuyer, and the $64,650 median income of a 4-person family at 80%-100% of AMI. Down payment assistance helps improve affordability by lowering the monthly payment associated with the home purchase. AHTF is a particularly important source of down payment assistance funds as it is one of the only sources available to families above 80% of AMI. Because Santa Fe is a high cost market, many of these families still need assistance to reach their homeownership goals, even though their incomes are higher than what many assistance programs allow.

The down payment barrier also hampers opportunities for homeownership in Santa Fe. Down payment requirements have increased in recent years. A family in Santa Fe earning about $48,000 would need almost 20 years to save a 20% down payment for a $215,000 home, based on the national savings rate (Center for Responsible Lending). For families without those funds, the main alternative is FHA, which still requires a 3.5% down payment plus closing costs, or about $14,000. Homewise uses our Homewise Mortgage to lower that barrier still, requiring a minimum 2% upfront cash contribution from the individual or family, or about $4,300. While it would take over 5 years for the low income family to save for the FHA mortgage, the Homewise Mortgage shortens that time to under 2 years. We use this Homewise Mortgage to leverage the impact of the down payment assistance loans. Our product removes the upfront cash barrier while the down payment assistance loan brings down the *monthly* payment to a more affordable amount, thereby

helping create new opportunities for homeownership.

The final obstacle to home purchase is credit, and Homewise addresses this obstacle through our free one-on-one home purchase preparation. Qualifying for a mortgage is a major barrier for some families in Santa Fe. From 2007 to 2013, the minimum credit score required for an FHA purchase loan increased from 625 to 690 and from 730 to 770 on conventional loans. The minimum credit score required by Homewise is 640. Through our home purchase preparation, home buyer education, and financial literacy classes, Homewise helps clients improve their credit profiles to meet our strict underwriting standards and then rewards their work with the lower cost Homewise Mortgage and, where needed, down payment assistance loans. In 2016, clients who started with a credit score under 640 increased their score by an average of 63 points through our home purchase preparation process. These supportive services are critical to making our down payment assistance program successful both in the short term and long term as it helps us qualify buyers for purchase who are poised for long-term success.

Despite the challenges facing prospective Santa Fe homeowners, there continues to be strong demand for home purchase. According to the Santa Fe Association of Realtors, the volume of single family home sales in the City increased 12% in Q4 2016 over Q4 2015. Our own leading indicators show a growth in demand for home purchase services as well. In 2016, Homewise worked with 765 clients to put together an individual home purchase action plan, about 10% higher than the prior year.

What is the timeline for the project?

Homewise assists approximately 200 households purchase homes each year, the vast majority of whom purchase homes in the City and are below 120% of AMI. It is anticipated that the AHTF funds will be fully deployed in down payment assistance loans within the first six to eight months of the contract period.

Site Information (if applicable) NOT APPLICABLE

If your proposed project include acquisition, conversion, preservation and new construction of homeownership or rental housing, please provide the following *information.*

Site control is or will be in the form of*: ☐ Deed ☐ Option

☐ Lease (Term_____Years) ☐ Purchase Contract ☐ Other (explain)

_____

* If project is recommended for funding, proof of site control must be provided before funds are disbursed.

Expiration Date of Contract, Option, or Lease_____(month/year)

Site Description:

Area of Site:_____acres or_____square feet

Is site zoned for your development? ☐ Yes ☐ No Zoning_____

If no, is site currently in the process of re-zoning?

☐ Yes ☐ No Re-Zoning_____

When is zoning issue to be resolved?_____(month/year)

Has the City approved the site plan and/or plat? ☐ Yes ☐ No

If yes, provide a copy of the site plan/plat.

Are there any other development reviews and approvals required? ☐ Yes ☐ No

If yes, explain:

_____

_____

_____

_____

List any required reports or studies underway or completed such as soils report, environmental assessment, traffic study)

_____

_____

_____

_____

Has the City issued the building permit? Yes No

Are all utilities presently available to the site? ☐ Yes ☐ No

If no, which utilities need to be brought to the site? _____

Who has responsibility of bringing utilities to site? _____

3.Affordability:

Outline the affordability time period for this project based on the following: (i.e. loans to $14,999 – 5 years, $15,000 to $40,000 – 10 years, 40,001-$100,000 – 15 years and over $100,000 – 20 years)

To ensure long term affordability and the responsible use of AHTF funds, Homewise will utilize a deferred mortgage that is due upon sale to recapture AHTF Funds. Recaptured funds will be revolved to provide additional down payment assistance loans to future buyers. The mortgage does not expire or forgive, ensuring that funds are recaptured beyond the minimum affordability periods required. Using this deferred mortgage tool to recapture funds ensures that Homewise's down payment assistance loan program complies with the City's long term affordability requirements.

4.Demonstrated Capability - Organizational Capacity

Describe the expertise of your organization and past projects to provide the type of housing or programs proposed for funding:

Homewise, founded in 1986, began its home purchase program in 1992. Since that time 3,592 (as of 12/31/16) families and individuals have purchased homes through Homewise. Homewise has been recognized for its effectiveness towards its mission of supporting homeowners toward the goal of financial security through homeownership, including maintaining the home as a valuable asset for building family wealth. The efficiency of Homewise is audited and reviewed by various funders including the City of Santa Fe, NeighborWorks® America, Opportunity Finance Network through the Aeris™ Rating system, the New Mexico Mortgage Finance Authority and our private auditors. Historically, these audits have consistently returned a result of no significant findings.

Since 2008, Homewise has been in the number one or two market share position for home purchase lending for loans under $250,000 in Santa Fe, a scale that positively influences the entire market. Since inception, we have created over 3,592 new homeowners and deployed over $391 million in home purchase loans (as of 12/31/16). By creating successful homeowners at a high volume, we help make our neighborhoods more resilient.

Our customers face obstacles of down payment, affordability and credit in their efforts to become homeowners. Homewise helps clients overcome credit, savings and debt obstacles through one–on-one counseling and free homebuyer education and financial literacy classes that prepare clients to qualify for a mortgage and become a financially successful homeowner.

Homewise's mortgage product meets our customers' needs in achieving and managing homeownership in a way that builds financial security through competitive long-term fixed rates, low fees, and the elimination of mortgage insurance.

Outside of Homewise, most of these clients would rely on an FHA loan, a public homeownership program, or a combination of both to overcome these challenges. Yet, the majority of banks in Santa Fe do not offer FHA mortgages and even fewer participate in the state housing finance agency's first-time homebuyer programs. Many lenders have established minimum credit score requirements that are higher than the secondary market requires, potentially disqualifying families and individuals in Santa Fe who wish to become homeowners.

Most importantly, other lenders do not offer counseling or education programs that help the prospective buyers improve their credit to meet strict loan standards. In addition, none of these lenders offer a product comparable to the Homewise Mortgage, which reduces the down payment requirement and eliminates expensive mortgage insurance.

Metric	FY13	FY14	FY15	YTD (as of 12/31/16)
# Attending Educational Classes (HBE and Financial Literacy)	509	426	755	311
Total # Homebuyers Created	205	139	182	117
$ Loaned for Homeownership	$61,644,792	$42,048,190	$52,905,768	$54,574,396

Total # Homes Developed	39	19	39	25

Describe your staffing and attach resumes of key personnel:

The Homewise staff responsible for Home Purchase services has many years of experience in financial counseling, homebuyer education, real estate sales, and lending and has created a seamless process for homeowners seeking these services. That team is backed by a skilled accounting and finance staff and a marketing department with expertise in messaging and media appropriate for these services. The Homewise staff has administered several previous CDBG and AHTF allocations for home purchase lending.

The staff directly responsible for Home Purchase lending includes:

Mark Vanderlinden, Chief Lending Officer, has over 30 years of experience in mortgage lending and operations management at Fannie Mae, Federal Home Loan Bank of Atlanta and the New Mexico Mortgage Finance Authority. He is responsible for managing Home Purchase Lending services.

Sheryl Kassetas, Mortgage Loan Originations Manager, Gina Smyer, Mortgage Loan Closing Manager, and Phil Vargas, Mortgage Loan Underwriter, oversee the underwriting, origination and closing of home purchase loans, including a team of 10 Loan Officer and Loan Processing staff members.

Lisa Wilson, Chief Financial Officer, Robin Kvech, Controller, Sarah Geisler, Senior Business Analyst, and Kate Preteska, Business Analyst, use their combined corporate accounting, business management and project and records management to oversee reporting and tracking of all government contracts awarded to Homewise.

Laura Altomare, Director of Communications and Development, and Rachel Silva, Marketing Manager, bring their seasoned marketing and communications expertise to develop the Homewise messaging and media strategies that will reach the target market for the home purchase services.

Michael Loftin, Chief Executive Officer, has 40 years of experience in housing and community development. He oversees Homewise's programs and services from strategy development to implementation and operation.

Demonstrate Financial Soundness. Please submit the following documentation:

- Audited Financial Statements for 2015 and 2014.
- Current Statement of Assets & Liability

SUBMITTAL REQUIREMENTS

Please attach one (1) unbound copy of the following items in the following order:

____Audited Financial Statements for 2015 and 2014

_____Current statement of Assets & Liability

_____Project budget

_____Leverage calculations

_____List of current board members

_____Fiscal Policies and Procedures

____Letter of compliance demonstrating cleared findings; or progress towards clearing findings

CITY OF SANTA FE
COMMUNITY DEVELOPMENT BLOCK GRANT (CDBG)
PROPOSAL SCORE SHEET / Bid Number '17/22/RFP

Name of Applicant/Project: NM Legal Aid · (CDBG)

Amount Requested: $ 15,000

Evaluation Criteria	Weighted Value	Evaluation Points 1 thru 5	Total Score	Max Score
Activity to be funded • Why needed? Does it address a gap? • Steps/phases to complete the activity • Who is served? • #s proposed to be served	20	X 4	80	100
National Objective Compliance • Benefits low/moderate income persons/households? • Prevents slum/blight • Does the activity serve residents Citywide or a Low to Moderate Income (LMI) Area (i.e. Census Tract)?	20	X 5	100	100
Consolidated Plan Compliance • Does the application demonstrate that it meets Consolidated Plan priorities?	10	X 5	50	50
Budget • Is proposed budget realistic? • Are other funding sources secured?	10	X 4	40	50
Performance Measurement/Work Plan • Are performance measurements, outcomes and proposed outcomes well presented? Realistic? Well-supported in the application? • Does the applicant have the administrative capacity to carry out the activity to be funded?	20	X 4 ~~5~~	80 ~~100~~	100
		Total Points	350.	**400**

CDC Evaluator Name

Signature

02/14/17
Date

CITY OF SANTA FE (CSF)
NON-DISCLOSURE AND CONFLICT OF INTEREST STATEMENT

REQUEST FOR PROPOSAL #'17/22/P

EVALUATOR NAME: John A. Padilla

CSF policy is to prevent personal or organizational conflict of interest, or the appearance of such conflict of interest, in the award and administration of CSF contracts and Purchase Orders.

I, _____, the undersigned, hereby certify that the following statements are true and correct and that I understand and agree to be bound by commitments contained herein.

I am acting at the request of CSF as a participant in the evaluation of *offers/ proposals* received in response to the *Request for Offers/ Request for Proposals,* entitled and/ or numbered
I am acting of my own accord and not acting under duress. I am not currently employed by, nor am I receiving any compensation from, nor have I been the recipient of any present or future economic opportunity, employment, gift, loan, gratuity, special discount, trip, favor, or service in connection with any *offer/ proposal* or involved *Offeror/Proposer* in return for favorable consideration. I have no preconceived position on the relative merits of any of the *offers/ proposals* nor have I established a personal preference or position on the worth or standing of any *Offeror/ Proposer* participating in this action. CSF policy is to prevent personal or organizational conflict of interest, or the appearance of such conflict of interest, in the award and administration of CSF contracts, including, but not limited to contracts for professional services, agreements with consultants and Purchase Orders.

I hereby certify that to the best of my knowledge and belief, no conflict of interest exists that may diminish my capacity to perform an impartial, technically sound, objective review of this proposal(s) or otherwise result in a biased opinion or unfair competitive advantage.
I agree not to disclose or otherwise divulge any information pertaining to the contents, status, or ranking of any *offer/ proposal* to anyone other than the team leader or other evaluation team members. I understand the terms and "disclose or otherwise divulge" to include, but are not limited to, reproduction of any part or any portion of any *offer/ proposal,* or removal of same from designated areas without prior authorization from the evaluation team leader. I agree to perform any and all evaluations of said *offers/ proposals* in an unbiased manner, to the best of my ability, and with the best interest of CSF paramount in all decisions.
I agree to return to CSF Purchasing Department all copies of proposals, as well as any abstracts, upon completion of the evaluation.

_____

SIGNATURE AND DATE:

Cover Page

City of Santa Fe Community Development Block Grant Program FY 2017-2018	
Name of Nonprofit Organization:	New Mexico Legal Aid
Name of Executive Director:	Ed Marks
Name of Board President:	Maria Garcia Geer
Name, Contact Information (Address, Phone, and Email) of Person Submitting Request (Fiscal Agent if appropriate):	Rebecca Mnuk. 505-545-8541, rebeccam@nmlegalaid.org 901 West Alameda, Suite 20 B, PO Box 32197 Santa Fe, NM 87594-2197
Amount Requested:	$15,000
Program Name or Service being requested for Funding:	Santa Fe Foreclosure Defense Project

Brief Program or Service Description:
Providing quality legal services at no cost to low-income Santa Fe residents in foreclosure on their home mortgages

Check which Category Describes your organization:
8. Private Non-Profit X
9. For Profit
10. Public Agency
11. Government Agency

DUNS or CAGE #	112143136
Business Registration #	271544
Tax ID #	85-0116950
State CRS #	01-504422-00-0

Check One:
- ☒ Previous Recipient
- ☐ New Applicant

Funding Categories to be Addressed (Circle one):
- ☒ Housing
- ☐ Public Facility
- ☐ Public Service

Project Proposal Summary
(If funded, the following will be written into the contract Scope of Services with Accomplishment Levels along with details provided in Section A)

Activity Name	Providing foreclosure defense services in support of current LMI homeowners
Brief Summary of the activity	An NMLA attorney will provide quality legal assistance at no cost to low- and moderate-
income Santa Fe homeowners at risk of foreclosure on their home mortgages.	

Amount of CDBG funding requested for Activity	$ 15,000
Total budget of Activity	$ 33,362

To the best of my knowledge and belief, all data in this application is true and correct. If funded, I certify that the Applicant Organization is willing and able to adhere to the polices and procedures specified by the City of Santa Fe and all applicable program regulations of the US Department of Housing and Urban Development. Further, I understand there is not an agreement until the City of Santa Fe and the individual authorized to execute contracts on behalf of the Applicant Organization has signed the contract.

	Executive Director	January 27, 2017
Authorized Signature *(sign in **blue** ink)*	Title	Date

CDBG funds can be used for specific Eligible Activities as outlined in the Overview. Select one type of Eligible Activity category that best describes your Project.

Type of Eligible Activity (check one)

Activities Related to Housing	X
Other Real Property Activities	
Public Facilities/Improvements	
Public Service	

Section A: Activity to be funded

A1. Briefly describe the Activity you are requesting to fund with CDBG. This will help determine eligibility.

The NMLA attorney will provide quality legal assistance at no cost to low- and moderate-income Santa Fe homeowners who are actively in foreclosure. The attorney will seek to improve the homeowner's ability to avoid foreclosure and retain his or her home, or, if retention is not possible, then help obtain a graceful exit that minimizes the harm to the homeowner. The attorney will assist homeowners through both direct representation and brief services such as limited representation or advice to pro se (self-represented) litigants. We anticipate serving 15 households through representation and an additional 12 households by providing advice for self-representing people at foreclosure workshops.

A2. Why is this Activity needed? Does it address a gap? Describe the degree of need, or the severity of a problem including cause, extent, location, frequency and duration that will be addressed by the project. Provide a description of service gaps the activity fills in the community. Additionally, supply data, such as demographics, reports and/or other information supporting your information and proving the need exists. **(Attach additional pages, if necessary)**

See "Response to A2" attached

A.3 If applicable, what steps or phases will be taken to complete the Activity (provision of services, engineering/design, advertising, bidding, contract award, construction, etc.)?

NMLA's Foreclosure Defense Project is an established, staffed program, no additional steps are needed to complete activities.

A.4 Describe the population that the Activity will serve and how this population will be served. Describe the outreach and recruitment activities which will be conducted to make the proposed activity services known and accessible to the targeted population. Please include where these outreach and recruitment activities will take place.

The Foreclosure Defense Project serves low and moderate income Santa Fe homeowners who are facing foreclosure. Outreach promotes a 1-800 hotline for foreclosure maintained by the Attorney General's office that refers cases to NMLA. NMLA also receives foreclosure referrals from other non-profit agencies and Law Access New Mexico, a telephonic legal referral service. NMLA also conducts outreach at community events and foreclosure workshops in Santa Fe.

A.5 Estimate the number of total persons / households that will benefit from the CDBG funded portion of this Activity: (Fill in Households OR Persons depending on the type of Activity you are providing).

Total number of clients you anticipate serving:		
Households: 27	**OR**	Persons:

A.6 Use the following Table 1 to break out the number of persons you anticipate serving at the low (30-50% AMI) and very low-income (< 30% AMI) levels and the type of client (Refer to overview of CDBG program for the most recent income amounts). Along with income, please anticipate the number of clients that are severely disabled adults, homeless persons, abused children, battered spouses, and illiterate adults, persons with AIDS, migrant farm workers, and elderly. (All of these clients fall under the presumed benefit categories as defined by CDBG and therefore, all under low or extremely low income). This would apply mainly to Public Service or Public Facilities/Improvements Activities.

Extremely Low Income (<30% AMI)	Low Income (31-50%)	Moderate Income 51-80%	Illiterate adults	Abused children	Severely Disabled Persons	Migrant Farm Workers	Elderly	Persons with AIDS	Homeless Persons
13	8	6			11 disabled		12		

Table 1

A.7 Use the following Table 2 to breakout the number of households you anticipate serving at the income levels listed. (Refer to the 2016 AMI table on pg. 18 for the most recent income amounts). This would apply mainly to CDBG funding for housing projects such as Down Payment Assistance and Rehabilitation Activities.

Extremely Low Income (<30% AMI)	Low Income (31-50%)	Moderate Income (51-80%)	Non-low Moderate Income (81-100%)	Female Head of Household
13	8	6		18

Table 2

A.8 CDBG funded construction activities must be in compliance with local land use plans and zoning. Explain how the proposed activity conforms to local plans and zoning ordinances. Provide a copy of the page(s) of resource document(s), pertinent sections, and page(s). This only applies to projects where the CDBG funds will used for the actual construction, not acquisition.

N/A

A.9 Please describe the organization in terms of its administrative capacity and its qualifying experience and length of experience with activities or projects similar to the proposed Activity. Include purpose, goals, programs, activities, clients, and accomplishments, if any, in the area of activity for which funding is requested. Give examples of and list experience.

NMLA has pursued justice and fought poverty for over sixty years by providing free civil legal services to low-income New Mexicans. NMLA was the product of the merger of northern, Indian, central and southern legal aid societies in 2003. Each year thousands of individuals are assisted who face legal crises regarding their housing or families, are the victims of consumer fraud or have been denied rightful health insurance or other benefits. NMLA currently has 58 staff and ten offices located strategically around the state. NMLA has received funding for foreclosure work in the last four years from national bank settlements distributed through the NM Attorney General's Office and the NM IOLTA Fund through competitive processes, as well as from the City of Santa Fe CDBG in 2016.

A.10 : Briefly describe your organizations experience in government contract administration, and knowledge of federal regulations governing acquisition, procurement, equal employment opportunity, and labor standards.

NMLA has a budget of close to $6.8 million in 2017 which comes from federal, state and private sources. NMLA is the state's major legal aid provider and receives federal Legal Services Corporation (LSC) funds. We undergo rigorous audits assuring adherence to policies and procedures. We receive grants and contracts from agencies of the State of New Mexico, the NM Civil Legal Services Commission, and the NM Access to Justice Commission. Our chief financial officer is a CPA with more than ten years experience in nonprofit accounting and work with federal labor, procurement and other regulations.

B. National Objective Compliance

1. Benefits Low/ Moderate Income persons/households by:	
Area Benefit (eligible area) (LMA)	
Limited Clientele (LMC)	
Housing Activities (LMH)	X
Job Creation or Retention (LMJ)	

B.2 Is the service area city wide: (X) yes ( )no
If no, fill out B.3.

B.3 If an activity is based on an area benefit, identify the Census Tract(s) and Block Group(s) that will be served. Make sure to read the Overview for a clear understanding of the requirements of an area benefit. Attach a map of the area.

Census Tract	Block Group	Total Population	Low/Mod Income Population	% Low/ Mod Income
Total				

B.4 Explain fully how the proposed project meets the CDBG National Objective selected above. Provide substantiating documentation supporting the claims. Refer to Overview for more detail.

NMLA's Foreclosure Defense Project is a public service program that helps low to moderate income individuals at risk of losing their homes by providing them with legal representation and advice. The project helps minimize individuals' debt and stabilize neighborhoods. Since the project began in 2012, 81 households in Santa Fe have received NMLA services. 38 were extensive services. Of those 38, 19 have resulted in a dismissal of the case by settlement. NMLA is able to help families stay in their homes or negotiate best options. The Project helps prevent urban blight by negotiating move-out dates and obtaining reimbursement for homeowners who are either unable to keep their homes or have decided *they will move out. Negotiating non-retention* options helps reduce stress on borrowers by removing fear of eviction, and it makes the move-out process more orderly so the lender can minimize the amount of time the house is vacant and a public safety risk.

C. Consolidated Plan Compliance

The City of Santa Fe provides guidance in its 2013-2017 Consolidated Plan on funding uses, whether Federal, State, City, or Private. In accordance with federal regulations, each project must be consistent with the priorities outlined in the City's Consolidated Plan. (See Consolidated Plan on City website) Mark the **one priority** that the proposed project will meet.

P-25 Priority Needs

Check	Priority Need Name	Priority Level	Population Served	Goals Addressed
	Rental Vouchers	High	Extremely low-income renters; people at risk of being homeless; persons with disabilities; homeless youth; veterans; elderly; families in transition; persons with HIV/AIDS and their families; public housing residents; mentally ill; chronic substance abusers; victims of domestic violence	Reduced rate of cost burden and corresponding drop in poverty rate for homeless households and those in danger of becoming homeless. *(Increase Opportunities for At Risk Populations);* Inventory of rental units and vouchers expanded to meet increased demand *(Increase Affordable Housing Opportunities)*
	Emergency Shelter (note could be classified as Public Service which is restricted in allocation amount)	High	Extremely low-income residents; chronic homeless; homeless youth; veterans; families in transition; mentally ill; chronic substance abusers; victims of domestic violence	Reduced rate of cost burden and corresponding drop in poverty rate for homeless households and those in danger of becoming homeless. *(Increase Opportunities for At Risk Populations)*
	Support Services for Homeless or People at Risk of Homelessness (note could be classified as Public Service which is restricted in allocation amount)	High	Extremely low-income renters; people at risk of being homeless; persons with disabilities; homeless youth; veterans; elderly; families in transition; persons with HIV/AIDS and their families; public housing residents; mentally ill; chronic substance abusers; victims of domestic violence	Reduced rate of cost burden and corresponding drop in poverty rate for homeless households and those in danger of becoming homeless. *(Increase Opportunities for At Risk Populations)*
X	Refinancing Services and Support for *Current* Homeowners	High	Low-income homeowners; homeowners in risk of foreclosure; homeowners in substandard housing	Reduced rate of cost burden and corresponding drop in poverty rate for homeless households and those in danger of becoming homeless. *(Increase Opportunities for At Risk Populations);* Increased homeownership opportunities and support for long term affordability and accessibility for current homeowners. *(Increase Affordable Housing Opportunities)*

Priority Needs (cont.)

Check	Priority Need Name	Priority Level	Population Served	Goals Addressed
	Homeowner Rehabilitation Programs, Energy-efficiency Upgrades, Accessibility Retrofits	High	Low- and moderate-income homeowners; residents in redeveloping or transitioning neighborhoods; homeowners living in aging or substandard housing stock; seniors who need to "age in place;" people with disabilities	Increased homeownership opportunities and support for long term affordability and accessibility for current homeowners. *(Increase Affordable Housing Opportunities);* Housing opportunities reflect emerging needs, changing demographics and are aligned with redevelopment projects, economic development objectives and sustainability goals *(Address Emerging and Current Needs and Changing Demographics)*
	Construction of affordably-priced homes for homeownership	Low	Low- and moderate-income homebuyers and current renters; local workforce	Increased homeownership opportunities and support for long term affordability and accessibility for current homeowners. *(Increase Affordable Housing Opportunities)*
	Fair Housing Outreach	High	Low- and moderate-income renters; low-income landlords; persons with disabilities; Spanish speakers; large families; general public	Housing opportunities reflect emerging needs, changing demographics and are aligned with redevelopment projects, economic development objectives and sustainability goals *(Address Emerging and Current Needs and Changing Demographics)*
	Diversity of Housing Types	Low	Low- and moderate-income renters; seniors; small households; entrepreneurs; aging veterans; entrepreneurs and other self-employed	Housing opportunities reflect emerging needs, changing demographics and are aligned with redevelopment projects, economic development objectives and sustainability goals *(Address Emerging and Current Needs and Changing Demographics)*
	Non-Housing Community Facilities and Services	High	Low- and moderate-income residents; residents in redeveloping or transitioning neighborhoods; youth	Housing opportunities reflect emerging needs, changing demographics and are aligned with redevelopment projects, economic development objectives and sustainability goals *(Address Emerging and Current Needs and Changing Demographics)*

Priority Needs (cont.)

Check	Priority Need Name	Priority Level	Population Served	Goals Addressed
	Provision of Rental Units and Support Services for LI/ VLI Renters	High	Low- and very low-income renters; persons transitioning out of homelessness; renters in need of support services; public housing residents	Inventory of rental units and vouchers expanded to meet increased demand *(Increase Affordable Housing Opportunities);* Housing opportunities reflect emerging needs, changing demographics and are aligned with redevelopment projects, economic development objectives and sustainability goals *(Address Emerging and Current Needs and Changing Demographics)*
	Rental Rehabilitation	Low	Low- and moderate-income renters; low-income landlords; residents of low- income neighborhoods that are redeveloping or in transition; public housing residents	Inventory of rental units and vouchers expanded to meet increased demand *(Increase Affordable Housing Opportunities);* Housing opportunities reflect emerging needs, changing demographics and are aligned with redevelopment projects, economic development objectives and sustainability goals *(Address Emerging and Current Needs and Changing Demographics)*
	Down Payment Assistance	High	Low- and moderate-income residents who are "buyer ready"; first responders (fire, police, etc.)	Increased homeownership opportunities and support for long term affordability and accessibility for current homeowners. *(Increase Affordable Housing Opportunities)*
	Homebuyer Training & Counseling	High	Low- and moderate-income homebuyers; current renters	Increased homeownership opportunities and support for long term affordability and accessibility for current homeowners. *(Increase Affordable Housing Opportunities)*

D. Budget

D1. Describe the Proposed Budget for this Activity. Please explain all budgeted expenses including contractual services, personnel services, commodities, and capital outlay. Also explain what the CDBG funds will be used for. Also explain the effect of *not receiving any or only a portion of a* CDBG allocation has on the project budget.

The project has a budget of $33,362: One fulltime licensed staff attorney dedicating 45% of her time to Santa Fe work, plus supplies and outreach expenses. Indirect costs, supported as an in-kind contribution by NMLA, are calculated at 10% of dedicated personnel and fringe, and represent items like rental, utilities, insurance and continuing legal education fees for licensure. Personnel and fringe = $29,511; supplies = $300; outreach expenses = $600; indirect (and offset to revenue) = $2951; TOTAL = $33,362. Not receiving these funds, if other cuts also happen, may mean this service will not be available to Santa Fe residents. Receiving a portion only may mean fewer clients can be served.

D.2 Please complete the following table to identify the funding sources and amounts. Indicate total project cost that incorporates the total CDBG request and what funds or services, if any, the sponsor and/or other agencies will contribute. Also enter other ***committed*** funding sources (committed funds are funds available or will be available to fund the Activity during the CDBG Fiscal Year). Please be as accurate as possible. Should your organization be awarded funding, a revised budget (as needed) will become an Addendum to the CDBG Contract.

Type of funding	Source/ amount	Source/ amount	Source/ amount	Totals
Requested CDBG amount				$ 15,000
Other HUD funds i.e. HOME, Section 108				$ 0
Other Federal Funds	NMLA/LSC $15,411			$ 15,411
City Funding i.e. Youth and Family, Human Services				$ 0
State funding, i.e. MFA				$ 0
Other i.e. in- kind, private funds	NMLA $2,951			$ 2,951

Total of all funding sources		**$** 33,362

D.3 If you are proposing to utilize CDBG funds to pay for staff costs, please list each position title and the percentage of their salary and benefits that will be funded by CDBG. Depending on the Activity, listing this information does not guarantee the position will be funded by CDBG as it may not be eligible.

PERSONNEL Position Title	**New (Y/N)**	**% salary & benefits paid for with CDBG**
Staff Attorney, Santa Fe Foreclosure Defense Project	N	45%

E. Performance Measurement System/Work Plan

CDBG/ Work Plan - FY 2017-2018

Provide the performance measurement goals, objectives and outcomes for your proposed CDBG project. Please refer to Exhibit B at the end of this document. Based on these measurements, attach a Work Plan that describes the goals, objectives and outcomes in greater detail and be:

(B) Specific
(C) Measurable
(D) Achievable
(E) Results-orientated
(F) Time bound

Low-income homeowners facing foreclosure have a much better chance to retain their homes if they can have an attorney assist them. The foreclosure process is very complicated and difficult for most people to successfully complete without help. There is an inherent unbalance of power with mortgage lender professionals on the one hand, knowledgeable about the legal system and how to pursue their claims, and unrepresented homeowners on the other. The process is also very emotionally loaded for homeowners who are faced with losing their homes, typically their largest asset, and quite literally the roof over their heads. *Legal aid is the resource* LMI families turn to for help to level the playing field. New Mexico Legal Aid is the primary provider of foreclosure defense services in northern New Mexico.

The US Census Quick Facts website's most recently reported information shows that the City of Santa Fe has a population of 84,099 (July 2015) and 37,200 housing units (July 2010). Of those units, 61.5% or 22,878 are owner-occupied. The City's population in poverty (July 2015) is 17.6% or approximately 14,801 individuals.

New Mexico has the 7th highest percent of homes in foreclosure (CoreLogic July 2016), in part because New Mexico is a judicial state where the process simply takes longer than in non-judicial states. Fortunately, foreclosure rates both nationally and locally in Santa Fe continue to decline from the heights of the Foreclosure Crisis, although slowly. In September 2012, one of every 248 US households received a foreclosure notice. Currently in the County of Santa Fe, one of every 1,369 housing units is in foreclosure (Realty Trac, December 2016), which calculates to be 1.9% of all housing units. In the City of Santa Fe, the Zillow.com website on January 24, 2017 advertised for sale 267 houses in foreclosure.

CITY OF SANTA FE
COMMUNITY DEVELOPMENT BLOCK GRANT (CDBG)
PROPOSAL SCORE SHEET / Bid Number '17/22/RFP

Name of Applicant/Project: Kitchen Angels. (CDBG.)

Amount Requested: $_____

Evaluation Criteria	Weighted Value	Evaluation Points 1 thru 5	Total Score	Max Score
Activity to be funded • Why needed? Does it address a gap? • Steps/phases to complete the activity • Who is served? • #s proposed to be served	20	X _____	_____	100
National Objective Compliance • Benefits low/moderate income persons/households? • Prevents slum/blight • Does the activity serve residents Citywide or a Low to Moderate Income (LMI) Area (i.e. Census Tract)?	20	X _____	_____	100
Consolidated Plan Compliance • Does the application demonstrate that it meets Consolidated Plan priorities?	10	X _____	_____	50
Budget • Is proposed budget realistic? • Are other funding sources secured?	10	X _____	_____	50
Performance Measurement/Work Plan • Are performance measurements, outcomes and proposed outcomes well presented? Realistic? Well-supported in the application? • Does the applicant have the administrative capacity to carry out the activity to be funded?	20	X _____	_____	100
		Total Points		**400**

Conflict of interest - John A. Padilla. (Client)

CDC Evaluator Name | Signature | Date 02/14/17

CITY OF SANTA FE (CSF)
NON-DISCLOSURE AND CONFLICT OF INTEREST STATEMENT

REQUEST FOR PROPOSAL #'17/22/P

EVALUATOR NAME:_____

CSF policy is to prevent personal or organizational conflict of interest, or the appearance of such conflict of interest, in the award and administration of CSF contracts and Purchase Orders.

I, _____, the undersigned, hereby certify that the following statements are true and correct and that I understand and agree to be bound by commitments contained herein.

I am acting at the request of CSF as a participant in the evaluation of *offers/ proposals* received in response to the *Request for Offers/ Request for Proposals,* entitled and/ or numbered
I am acting of my own accord and not acting under duress. I am not currently employed by, nor am I receiving any compensation from, nor have I been the recipient of any present or future economic opportunity, employment, gift, loan, gratuity, special discount, trip, favor, or service in connection with any *offer/ proposal* or involved *Offeror/Proposer* in return for favorable consideration. I have no preconceived position on the relative merits of any of the *offers/ proposals* nor have I established a personal preference or position on the worth or standing of any *Offeror/ Proposer* participating in this action. CSF policy is to prevent personal or organizational conflict of interest, or the appearance of such conflict of interest, in the award and administration of CSF contracts, including, but not limited to contracts for professional services, agreements with consultants and Purchase Orders. client of John A. Padilla.

I hereby certify that to the best of my knowledge and belief, no conflict of interest exists that may diminish my capacity to perform an impartial, technically sound, objective review of this proposal(s) or otherwise result in a biased opinion or unfair competitive advantage.
I agree not to disclose or otherwise divulge any information pertaining to the contents, status, or ranking of any *offer/ proposal* to anyone other than the team leader or other evaluation team members. I understand the terms and "disclose or otherwise divulge" to include, but are not limited to, reproduction of any part or any portion of any *offer/ proposal,* or removal of same from designated areas without prior authorization from the evaluation team leader. I agree to perform any and all evaluations of said *offers/ proposals* in an unbiased manner, to the best of my ability, and with the best interest of CSF paramount in all decisions.
I agree to return to CSF Purchasing Department all copies of proposals, as well as any abstracts, upon completion of the evaluation.

Kitchen Angels (conflict) 02/14/17

SIGNATURE AND DATE:

City of Santa Fe, New Mexico

200 Lincoln Avenue, P.O. Box 909, Santa Fe, N.M. 87504-0909

Kitchen Angels – Delivering Meals to Low Income Homebound and Chronically Ill Individuals

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Sub-recipient:
N/A

CDBG
Application

FY 2017-2018 GRANT YEAR

STARTING JULY 1, 2017

Cover Page

City of Santa Fe Community Development Block Grant Program FY 2017-2018	
Name of Nonprofit Organization:	Kitchen Angels
Name of Executive Director:	Tony McCarty
Name of Board President:	Elva P. Busch
Name, Contact Information (Address, Phone, and Email) of Person Submitting Request (Fiscal Agent if appropriate):	Tony McCarty, Executive Director 1222 Siler Road Santa Fe, NM 87507 505-471-7780 tmccarty@kitchenangels.org
Amount Requested:	$30,000.00
Program Name or Service being requested for Funding:	Delivery of meals to low income, homebound and chronically ill individuals.

Brief Program or Service Description: Since 1992, Kitchen Angels has delivered meals to low income homebound and chronically ill individuals, five days a week (with extra meals for weekends). We have helped keep more than 5,000 individuals in the comfort and safety of their own homes, reducing both reliance on and the cost for institutional care. Clients live throughout the greater Santa Fe area and would go without appropriate nutrition were it not for Kitchen Angels' services. Each meal we deliver includes the nutritional equivalent of at least two meals and contains a soup or salad, an entrée, dessert or fruit, and whole-grain bread. Once each week, we provide whole fresh fruit for snacks, protein supplements by request, and frozen entrées for weekend meals. Meals are formulated to meet individual dietary needs and follow one of dietary tracks. Client nutritional needs are assessed by a Certified Nutritionist/Registered Dietitian. Soups and salads are wheat and gluten free.

Check which Category Describes your organization:

8. Private Non-Profit X
9. For Profit
10. Public Agency
11. Government Agency

DUNS or CAGE #	80-4894488
Business Registration #	17-00040240
Tax ID #	85-0423492
State CRS #	02-265-457-00-7

Check One: X Previous Recipient
New Applicant

Funding Categories to be Addressed (Circle one):

Housing
Public Facility
X Public Service

Project Proposal Summary
(If funded, the following will be written into the contract Scope of Services with Accomplishment Levels along with details provided in Section A)

Activity Name	Delivery of Meals to Low Income Homebound, Chronically Ill Individuals
Brief Summary of the activity	
Kitchen Angels delivers free meals to low income homebound and chronically ill individuals, five days a week (with extra meals for weekends). Our program helps keep these individuals in the comfort and safety of their own homes, reducing both reliance on and the cost for institutional care. Clients live throughout the greater Santa Fe area. Each meal includes the nutritional equivalent of at least two meals and contains a soup or salad, an entrée, dessert or fruit, and whole-grain bread. Once each week, we provide whole fresh fruit for snacks, protein supplements by request, and frozen entrées for weekend meals. Meals are formulated to meet individual dietary needs and follow one of six dietary tracks. Client nutritional needs are assessed by a Certified Nutritionist/Registered Dietitian. Soups and salads are wheat and gluten free.	

Amount of CDBG funding requested for Activity	$ 30,0000.00
Total budget of Activity	$ 826,270.00

To the best of my knowledge and belief, all data in this application is true and correct. If funded, I certify that the Applicant Organization is willing and able to adhere to the polices and procedures specified by the City of Santa Fe and all applicable program regulations of the US Department of Housing and Urban Development. Further, I understand there is not an agreement until the City of Santa Fe and the individual authorized to execute contracts on behalf of the Applicant Organization has signed the contract.

Authorized Signature *(sign in blue ink)*	Executive Director Title	January 27, 2017 Date

CDBG funds can be used for specific Eligible Activities as outlined in the Overview. Select one type of Eligible Activity category that best describes your Project.

Type of Eligible Activity (check one)

Activities Related to Housing	
Other Real Property Activities	
Public Facilities/Improvements	
Public Service	X

A. Activity to be funded

A1. Briefly describe the Activity you are requesting to fund with CDBG. This will help determine eligibility.

Kitchen Angels delivers freshly prepared meals five days a week to homebound chronically or terminally ill people. Each meal contains a soup or salad, an entrée, dessert or fruit, and whole-grain bread. Once each week, we provide whole fresh fruit for snacks, protein supplements by request, and frozen entrées for weekend meals. Meals are formulated to meet individual dietary needs and follow one of six dietary tracks. Soups and salads are wheat and gluten free. Services are provided without charge. In addition to meal delivery, we also provide the services of a Registered Nutritionist and Dietitian who consults with clients to ensure that their nutritional needs are met.

Founded in 1992, we remain the ***only*** organization in New Mexico that provides free home delivered meals to chronically or terminally ill homebound individuals under age 60 and our client-load of individuals over age 60 with special dietary needs grows significantly each year.

Among our clients, 87% live at or below federal poverty guidelines. Nationally, for the chronically ill, one in three must choose between buying food and buying medications.

Since our beginning, we've delivered more than 1.1 million meals to nearly 5,000 homebound and chronically ill individuals.

Originally, our focus was individuals ***under*** age 60. This was a population that fell outside any of the existing nutrition support programs. For the past eight years, however, more than fifty percent of our clients have been ***over*** 60, primarily because our local senior meals program is unable to address the unique dietary needs of many of the elderly. All of our clients lack the resources to prepare their own food. Typically, they can neither shop nor cook and have no other means to provide for their nutrition. Without our services, most of our clients could not afford healthcare, even with the expansion of Medicaid and subsidized health insurance, and many would be unable to remain in their homes, requiring that they move to publicly financed institutional care such as nursing care facilities. With the potential repeal of the Affordable Care Act and Medicaid's expanded enrollment, the tension between paying for health care and medications and paying for food will likely return to pre-Affordable Care Act levels.

Client enrollment grows every year. It was in 2008 that we first began to see a significant jump in clients over age 60 with special dietary needs. Elderly clients typically tend to stay on service for the duration of their lives.

A2. Why is this Activity needed? Does it address a gap? Describe the degree of need, or the severity of a problem including cause, extent, location, frequency and duration that will be addressed by the project. Provide a description of service gaps the activity fills in the community. Additionally, supply data, such as demographics, reports and/or other information supporting your information and proving the need exists. **(Attach additional pages, if necessary)**

Food is life. Proper nutrition facilitates good health and can mitigate the effects of illness. Yet, estimates of the rate of food insecurity in northern New Mexico run as high as 18%, or roughly 125,000 people. Home delivery of meals has been studied repeatedly and is consistently found to be one of the most effective (as well as cost effective) methods of addressing the nutrition needs of low income *homebound* and chronically ill individuals. It also reduces the cost of healthcare and improves health outcomes, as well as improves individuals' perceived quality of life. Studies show roughly one in three chronically ill individuals cannot afford food ***and*** health care. With poverty continuing to plague New Mexico and with almost 25,000 people in Santa Fe County unsure where their next meal is coming from, Kitchen Angels' meal delivery program is a critical component of the social service safety net keeping residents in their homes, out of high cost institutional care, and out of the hospital and emergency room.

In one of the most compelling studies of the impact home delivered meals has on the cost and consumption of health care services, a 2013 Philadelphia project examined the cost-saving impact home-delivered meals have on health care. The Metropolitan Area Neighborhood Nutrition Alliance (MANNA) looked at the health care expenditures of 65 Medicaid-enrolled chronically ill clients over time and compared those expenditures with a similar group of Medicaid patients who did not receive meal delivery services. MANNA is a non-profit organization similar to Kitchen Angels. All health care expenditures were examined both before and after clients began receiving services.

Researchers found that mean monthly health care costs dropped by 28 percent for the 65 clients receiving nutrition services, from $38,937 to $28,183. The cost and frequency of hospital admissions and lengths of stay also decreased. More precisely ***"not only was the length of [hospital stays] 37 percent shorter for the MANNA client group, but also the number of admissions was half that of the comparison group."*** In the 12 months following the start of MANNA's home-delivered meal services, 93 percent of clients with in-patient hospitalizations were discharged to their homes; 72 percent of those who did not receive home-delivered meal services were discharged to an acute care facility.

A 2015 year-long study in Seattle also looked at the impact a local meal delivery program had on clients' health. On average, clients experienced a substantial change in the severity of their symptoms over the course of the year. Individuals who were in a "high nutrition risk" category in their benchmark nutrition screening experienced the most positive change over the course of the year. Eighty-seven percent of surveyed clients agreed or strongly agreed that receiving food from the program reduced their stress and worry about not having enough to eat. ***On average clients agreed that meal delivery allowed them to become self-sufficient, eat more nutritiously, reduce stress about not having enough to eat, and have enough food to eat.***

An aging population tends to require more social support services than a relatively young population, even if that relatively young population is experiencing chronic or situational medical conditions. Drawing from the *Santa Fe County Senior Services Strategic Plan 2016 – 2020*, "Seniors currently make up roughly 14 percent of the County's population, and the percentage of seniors is expected to increase dramatically over the next 25 years as increasing numbers of baby-boomers reach age 65. Between now and 2040, Santa Fe County's senior population is expected to triple, growing from approximately 20,000 to a projected level of approximately 60,000. To put this in perspective, by 2040, approximately 33% (one-third) of the County's population will be 60(plus). Each day more baby boomers and migrating retirees are joining the ranks of the Silver Tsunami populating Santa Fe County." This will stretch every agency's capacity to meet an aging population's needs even further than it currently is stretched.

Recognizing these challenges, the County's strategic plan incorporates five goals:

1. Increase the number of seniors served through existing services including expansion into underserved areas;
2. Increase seniors' consumption of healthy foods and promote healthy food habits and practices;
3. Increase access to home-based support services to support seniors aging in place in a safe environment;
4. Reduce incidents of falls and fall-related injuries among seniors; and
5. Increase seniors' social networking and physical activity levels to decrease social isolation and promote social engagement.

Kitchen Angels directly addresses four of the County's goals and, as the County population's needs are better met, strain on city-based services is mitigated. But It's not just nutritional needs that Kitchen Angels addresses. Our volunteers create meaningful and often powerful and long lasting relationships with the clients to whom they deliver meals. Frequently, our delivery volunteers are the only social interaction clients experience. Isolation and the accompanying loneliness can send an individual down a path toward worsening health and even more intense loneliness. While some assumed the culprit was a lack of others with whom to interact, research

suggests there's a direct biological link between being lonely and severity of illness. John Cacioppo, a social psychologist with the University of Chicago, found that loneliness can set into a motion a barrage of negative impacts inside the human body. With additional social contact, however, some of these ill effects can be stopped. Dr. Cacioppo's study found, for instance, that loneliness is tied to hardening of the arteries (which leads to high blood pressure), inflammation in the body, and even problems with learning and memory.

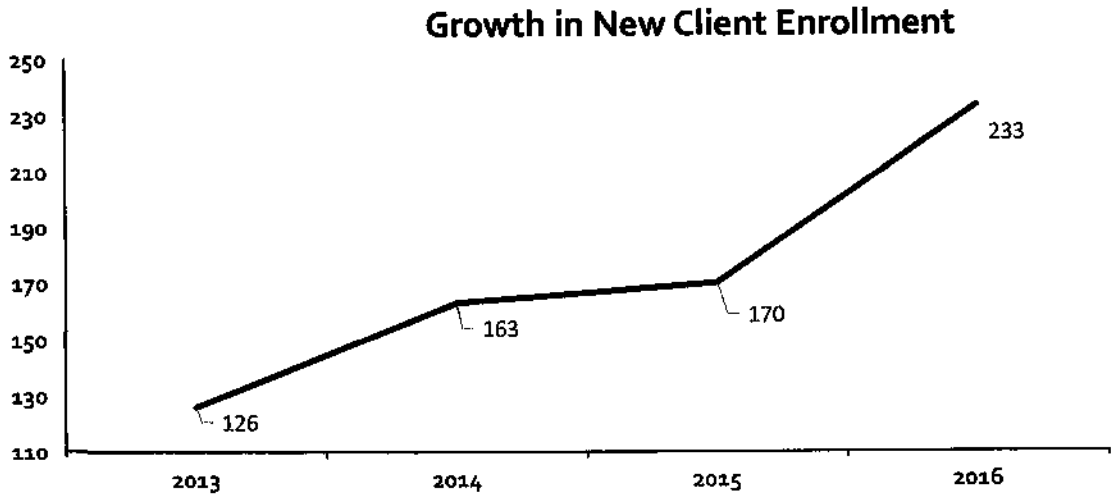
Kitchen Angels has known since our beginning that we can't improve clients' well-being on our own. Individuals who are chronically ill, homebound and food-insecure typically need a variety of services beyond home delivered meals. We work with other social service organizations in the community to make sure our clients receive the broadest array of services available and appropriate. In 2012, we joined with nine other non-profit health and social service agencies to form the Northern New Mexico Service Providers Alliance, (SPA) to better coordinate care across agencies, avoid duplication of services, and leverage resources more effectively. While we made some progress in coordinating services, a lack of funds to support the necessary information technology infrastructure prevented SPA from coming to complete fruition. Nevertheless, Kitchen Angels remains committed to working closely with other agencies and our Client Services Manager is a Certified Peer Support Worker through the New Mexico Office of Peer Recovery and Engagement. As such, she provides peer support and practical assistance to Kitchen Angels clients when they need services from other organizations.

This "wrap around" approach to client support is not unique to Kitchen Angels. In 2016, the US Centers for Medicare and Medicaid Services (CMS) announced $157 million to fund what they call "Accountable Health Communities". The initiative is intended to address the gap between clinical care and community services in the current health care delivery system by testing whether systematically identifying and addressing the health-related social needs of beneficiaries' impacts total health care costs, improves health, and quality of care. The model is based on emerging evidence that addressing health-related social needs through enhanced clinical-community linkages can improve health outcomes and reduce costs. Unmet health-related social needs, such as food insecurity and inadequate or unstable housing, may increase the risk of developing chronic conditions, reduce an individual's ability to manage these conditions, increase health care costs, and lead to avoidable health care utilization. It remains to be seen if the funding will remain intact under the incoming administration.

A.3 If applicable, what steps or phases will be taken to complete the Activity (provision of services, engineering/design, advertising, bidding, contract award, construction, etc.)?

Kitchen Angels already delivers meals to homebound and chronically ill individuals. In 2016, we relied on close to 650 active and visiting volunteers, who provided more than 35,500 hours, to cook, package and deliver meals throughout the greater Santa Fe area. Our proposal does not involve implementation. New clients enroll for service throughout the year and the number of new clients needing services continues to grow each year.

Clients new to Kitchen Angels service has grown steadily during the past few years, as evidenced by the chart on the following page. In 2008, we enrolled 108 new clients. By 2014, that number had grown to 163. In 2016, the number of new clients brought onto service was 233, representing a 37% increase in newly enrolled individuals over 2015. In spite of this growing demand, Kitchen Angels has never had a waiting list for our meal delivery service.

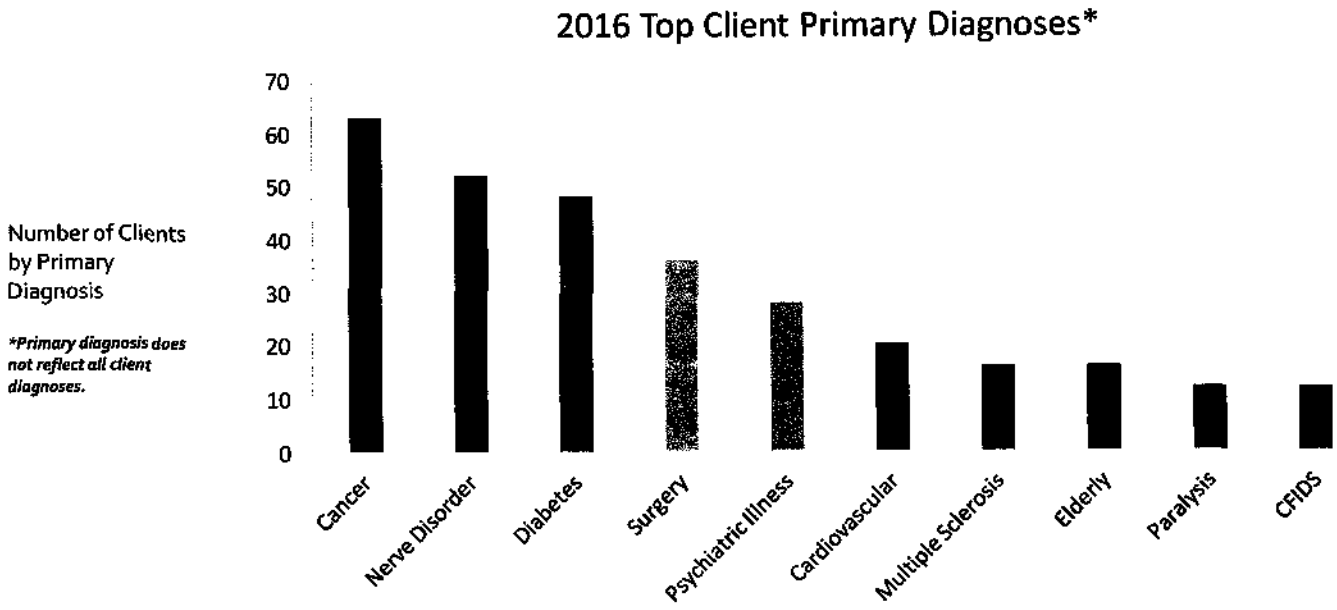


A.4 Describe the population that the Activity will serve and how this population will be served. Describe the outreach and recruitment activities which will be conducted to make the proposed activity services known and accessible to the targeted population. Please include where these outreach and recruitment activities will take place.

Eighty-seven percent of Kitchen Angels clients are economically disadvantaged, based on U.S. Department of Health and Human Services guidelines. In 2016:

- 43% had incomes categorized as "extremely low;"
- 22% had incomes that were "very low;" and
- 22% had incomes that were "moderately low."

To qualify for our services, individuals must demonstrate that they have a chronic or life-threatening illness, live alone, are unable to provide nutrition for themselves on a regular basis, and lack consistent family or other social support to assist them with meals. Typically, referrals are made by clients' health care providers. The following chart reflects clients' primary diagnoses in 2016 (they do not reflect co-occurring disorders which affect the majority of clients):



Client demographics generally reflect the larger community. Again, in 2016:

- 55% of clients were Caucasian; 36% were Hispanic; six percent were Native American; and two percent were African American;
- 57% of clients were female;
- 97% of clients were age 18 and over; and
- 52% were age 60 and over.

A.5 Estimate the number of total persons / households that will benefit from the CDBG funded portion of this Activity: (Fill in Households OR Persons depending on the type of Activity you are providing).

Total number of clients you anticipate serving		
Households: N/A	**OR**	Persons: 17 new clients

A.6 Use the following Table 1 to break out the number of persons you anticipate serving at the low (30-50% AMI) and very low-income (< 30% AMI) levels and the type of client (Refer to overview of CDBG program for the most recent income amounts). Along with income, please anticipate the number of clients that are severely disabled adults, homeless persons, abused children, battered spouses, and illiterate adults, persons with AIDS, migrant farm workers, and elderly. (All of these clients fall under the presumed benefit categories as defined by CDBG and therefore, all under low or extremely low income). This would apply mainly to Public Service or Public Facilities/Improvements Activities.

These numbers reflect estimated total clients to be served in 2017 based on 2016 enrollment and do not reflect those clients served solely by CDBG funds.

Extremely Low Income (<30% AMI)	Low Income (31-50%)	Moderate Income (51-80%)	Illiterate Adults	Abused Children	Severely Disabled Persons	Migrant Farm Workers	Elderly	Persons with AIDS	Homeless Persons
175	88	87	N/A	N/A	368	N/A	211	7	N/A

Table 1

Typically, Kitchen Angels clients are not homeless (meals are delivered to clients in their homes). Occasionally, we will enroll an individual for service who has no permanent home and lives either in a homeless shelter, transitional living environment, or a motel. By definition, all of our clients are disabled except for dependent children living with a disabled parent. In 2016, 3% of clients were dependent children. One of the principal goals of our service is to ***prevent*** homelessness or the displacement of chronically ill individuals from their homes.

A.7 Use the following Table 2 to breakout the number of households you anticipate serving at the income levels listed. (Refer to the 2016 AMI table on pg. 18 for the most recent income amounts). This would apply mainly to CDBG funding for housing projects such as Down Payment Assistance and Rehabilitation Activities.

Extremely Low Income (<30% AMI)	Low Income (31-50%)	Moderate Income (51-80%)	Non-low Moderate Income (81-100%)	Female Head of Household
175	88	87	54	229

Table 2

A.8 CDBG funded construction activities must be in compliance with local land use plans and zoning. Explain how the proposed activity conforms to local plans and zoning ordinances. Provide a copy of the page(s) of resource document(s), pertinent sections, and page(s). This only applies to projects where the CDBG funds will used for the actual construction, not acquisition.

Not applicable.

A.9 Please describe the organization *in terms of its* administrative capacity and its qualifying experience and length of experience with activities or projects similar to the proposed Activity. Include purpose, goals, programs, activities, clients, and accomplishments, if any, in the area of activity for which funding is requested. Give examples of and list experience.

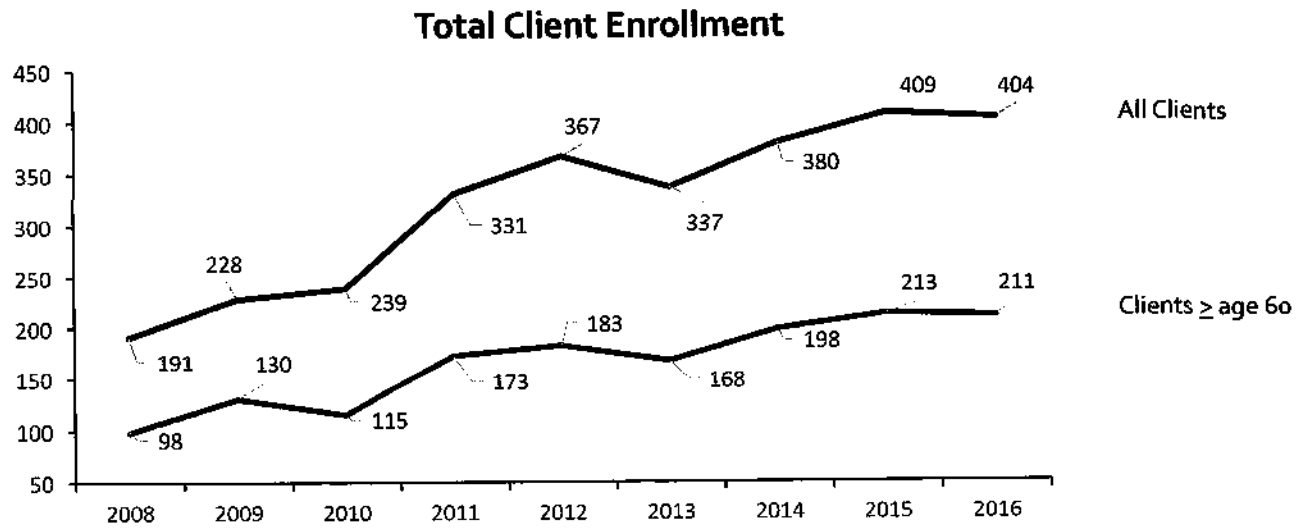
Kitchen Angels remains committed to a single focus: providing meals to homebound chronically ill individuals. In doing so, we mitigate the impact poverty has on these individuals' health and health outcomes, their ability to access appropriate healthcare services, afford their medications, and remain in the comfort and safety of their own homes for as long as possible. We were created in 1992 to address the social services gap that these individuals faced and are housed in the Coll-Green Angel Depot on Santa Fe's south side, a facility dedicated to ending hunger in northern New Mexico. We have been in this facility since 2001.

Our primary goal is to ensure that no one in our community who is homebound because of a chronic, surgery-related or terminal medical condition should go without appropriate nutrition, regardless of their ability to pay for our services.

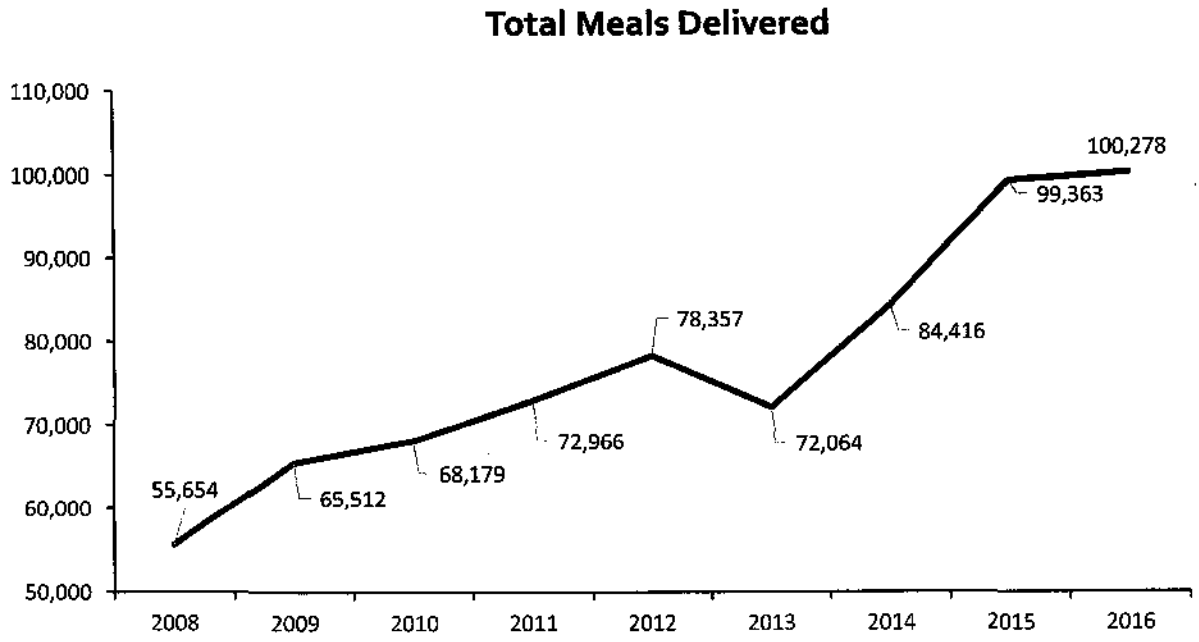
In support of this goal, we remain committed to:

- Improving clients' quality of life by ensuring that fragile, homebound individuals have a daily opportunity to interact with a concerned and caring person;
- Providing nutritional consultation to clients with extreme dietary requirements through the services of a certified nutritionist/registered dietitian;
- Ensuring nutritional needs are met so that our clients with limited incomes can remain in their own homes; and
- Increasing our collaboration with other agencies dedicated to ending hunger in New Mexico.

Client enrollment grows steadily from year to year. As the graph below illustrates, enrollment for service has grown in six of the past eight years. Since 2008, our client base has more than doubled, from 191 to 404, and clients over age 60 continue to represent more than 50% of our enrollment. In 2008, we served 98 senior clients; in 2016, that number was 211. The average length of time a client remains on service has also grown: from two-and-a-half years to nearly three years. Senior clients tend to remain on service for the duration of their lives.



Meals prepared and delivered in 2016 increased slightly over 2015, from 99,363 to 100,278. Since 2008, the number of meals we've prepared and delivered has nearly doubled.



Access to reliable and appropriate nutrition remains a significant issue for many individuals, not only within the Santa Fe community but throughout the state. The *American Journal of Medicine* finds that nearly one in three chronically ill individuals has difficulty paying for food, medicine or both. Access to appropriate nutrition and its link to health and health outcomes has been well documented for many years.

Recognizing the challenges that social determinants such as access to food pose to individual health and healthcare resources, Santa Fe County is piloting its own Accountable Health Community project, modeled after the CMS project mentioned in Section A2, to determine the best way to link needed social support services to those who need them. The goal of the County project is to "create a strong network of providers and stakeholders working together across agency lines to link residents to needed resources." With behavior and social and economic factors accounting for as much as 70% of the drivers of health outcomes, the County feels it is critical to make sure individuals have access to the services they need. This is especially true as the general population ages and the need for services mushrooms. A recent *New York Times* article on the "greying of America" cited the US Census Bureau's forecast that, by 2050, the number of Americans over the age of 65 will have doubled, while the number older than 85 will have tripled. Currently, 15% of Americans are over 65.

Access to social services isn't the only need that will be growing. As the *2013 Santa Fe County Profile* stated "Numerous studies have shown a link between social isolation and poor health outcomes. Dysfunctional families, minimal contact with others, and disengagement from community life have been linked to both poor health and premature death." Kitchen Angels volunteers create meaningful and often powerful and long lasting relationships with the clients to whom they deliver meals. Frequently, our delivery volunteers are the only social interaction clients experience and clients frequently let us know of the impact we've had on their lives. Recently, one client wrote:

> ***"Your interactions with all of us homebound, and often socially isolated, clients certainly restore our dignity and elicit profound gratitude. It's very likely that I would have become homeless or institutionalized without your help."***

Cancer remains the largest single category of medical diagnosis for Kitchen Angels clients. Chronic diseases such as diabetes and cardiovascular disease are also prevalent, however. This is why we provide six dietary tracks to help clients manage their medical conditions as well as nutritional consultation to our clients through a Certified Nutritionist/Registered Dietitian. Ninety-nine percent of clients reported last April that their diet had improved and 96.9% reported that their weight had improved since starting our services. Weight control and dietary management are two critical components of addressing the complications of chronic disease.

For a growing senior population, Kitchen Angels addresses an increasingly limited capacity in services. Keeping pace with the growing senior population will strain public and private resources even further. Feeding homebound seniors is proven to help keep them out of nursing homes. From a quality of life perspective, this is important because most people prefer to remain in the comfort and safety of their homes for as long as possible. Improved ability to live independently is another measure we track with our clients. Last year, 95% indicated our services helped them to live a more independent life, up from 92.2% in 2014. From a cost perspective, comparing the $1,771 it costs each year to feed a Kitchen Angels client to the more than $77,650 it costs each year to house a person in a nursing home (based on the 2016 Genworth Financial survey of New Mexico nursing homes), the savings to publicly funded health care programs remain roughly 44:1.

A.10: Briefly describe *your organizations experience in government* contract administration, and knowledge of federal regulations governing acquisition, procurement, equal employment opportunity, and labor standards.

Kitchen Angels has successfully administered government funded contracts throughout our history. We have received funding from the State of New Mexico as well as through the City of Santa Fe. We currently receive funding from the City's Health and Human Services Department as well as Community Development Block Grant funds. We are fully compliant with all New Mexico Attorney General's Office reporting requirements. Our most recent Federal Form 990, for the calendar year 2015, was filed with both the IRS and the Attorney General's Office. Our most recent Independent Auditor's Report, which examined, among other things, our use of accounting principles and practices, provided an unqualified opinion of our financial statement and position. We have never received a qualified audit report. We remain fully compliant with all reporting standards and requirements, including record keeping, reporting, monitoring and performance measures.

B. National Objective Compliance

B.1 Identify which of the following National Objectives this Activity will address (check only one):
(Note that the National Objectives are explained in the Overview and only one can apply to your project as it relates to the Eligible Activity) Discussion will take place at the Pre-App meeting to help with explanations and definitions.

1. Benefits Low/ Moderate Income persons/households by:	
Area Benefit (eligible area) (LMA)	
Limited Clientele (LMC)	X
Housing Activities (LMH)	
Job Creation or Retention (LMJ)	

B.2 Is the service area city wide: (X) yes ( ) no
If no, fill out B.3.

B.3 If an activity is based on an area benefit, identify the Census Tract(s) and Block Group(s) that will be served. Make sure to read the Overview for a clear understanding of the requirements of an area benefit. Attach a map of the area.

Census Tract	Block Group	Total Population	Low/Mod Income Population	% Low/ Mod Income
Total	N/A	N/A	N/A	N/A

B.4 Explain fully how the proposed project meets the CDBG National Objective selected above. Provide substantiating documentation supporting the claims. Refer to Overview for more detail. (Attach additional pages, if necessary)

Our client base, drawn from throughout the greater Santa Fe area, is almost exclusively at or below 100% of federal poverty guidelines. In 2016, 87% of clients were at or below the FPL. Individuals are eligible to receive Kitchen Angels services if they have a *medical provider's certification* that they are homebound and have a debilitating illness that affects their capacity to meet their nutritional needs. In addition, clients typically have no friends, family or other social support to assist them in meeting their nutritional needs. Fifty-four percent of clients rely on Medicaid for their health insurance and 43% rely on Medicare.

C. Consolidated Plan Compliance

The City of Santa Fe provides guidance in its 2013-2017 Consolidated Plan on funding uses, whether Federal, State, City, or Private. In accordance with federal regulations, each project must be consistent with the priorities outlined in the City's Consolidated Plan. (See Consolidated Plan on City website). Mark the one priority that the proposed project will meet.

P-25 Priority Needs

Check priority	Priority Need Name	Priority Level	Population	Goals Addressed
	Rental Vouchers	High	Extremely low-income renters; people at risk of being homeless; persons with disabilities; homeless youth; veterans; elderly; families in transition; persons with HIV/AIDS and their families; public housing residents; mentally ill; chronic substance abusers; victims of domestic violence	Reduced rate of cost burden and corresponding drop in poverty rate for homeless households and those in danger of becoming homeless. *(Increase Opportunities for At Risk Populations);* Inventory of rental units and vouchers expanded to meet increased demand *(Increase Affordable Housing Opportunities)*

	Emergency Shelter (note could be classified as Public Service which is restricted in allocation amount)	High	Extremely low-income residents; chronic homeless; homeless youth; veterans; families in transition; mentally ill; chronic substance abusers; victims of domestic violence	Reduced rate of cost burden and corresponding drop in poverty rate for homeless households and those in danger of becoming homeless. *(Increase Opportunities for At Risk Populations)*
X	Support Services for Homeless or People at Risk of Homelessness (note could be classified as Public Service which is restricted in allocation amount)	High	Extremely low-income renters; people at risk of being homeless; persons with disabilities; homeless youth; veterans; elderly; families in transition; persons with HIV/AIDS and their families; public housing residents; mentally ill; chronic substance abusers; victims of domestic violence	Reduced rate of cost burden and corresponding drop in poverty rate for homeless households and those in danger of becoming homeless. *(Increase Opportunities for At Risk Populations)*
	Refinancing Services and Support for Current Homeowners	High	Low-income homeowners; homeowners in risk of foreclosure; homeowners in substandard housing	Reduced rate of cost burden and corresponding drop in poverty rate for homeless households and those in danger of becoming homeless. *(Increase Opportunities for At Risk Populations);* Increased homeownership opportunities and support for long term affordability and accessibility for current homeowners. *(Increase Affordable Housing Opportunities)*

	Homeowner Rehabilitation Programs, Energy-efficiency Upgrades, Accessibility Retrofits	High	Low- and moderate-income homeowners; residents in redeveloping or transitioning neighborhoods; homeowners living in aging or substandard housing stock; seniors who need to "age in place;" people with disabilities	Increased homeownership opportunities and support for long term affordability and accessibility for current homeowners. *(Increase Affordable Housing Opportunities);* Housing opportunities reflect emerging needs, changing demographics and are aligned with redevelopment projects, economic development objectives and sustainability goals *(Address Emerging and Current Needs and Changing Demographics)*
	Construction of affordably priced homes for home ownership	Low	Low- and moderate-income home buyers and current renters; local workforce	Increased homeownership opportunities and support for long term affordability and accessibility for current homeowners. *(Increase Affordable Housing Opportunities)*

	Fair Housing Outreach	High	Low- and moderate-income renters; low-income landlords; persons with disabilities; Spanish speakers; large families; general public	Housing opportunities reflect emerging needs, changing demographics and are aligned with redevelopment projects, economic development objectives and sustainability goals *(Address Emerging and Current Needs and Changing Demographics)*
	Diversity of Housing Types	Low	Low- and moderate-income renters; seniors; small households; entrepreneurs; aging veterans; entrepreneurs and other self-employed	Housing opportunities reflect emerging needs, changing demographics and are aligned with redevelopment projects, economic development objectives and sustainability goals
	Non-Housing Community Facilities and Services	High	Low- and moderate-income residents; residents in redeveloping or transitioning neighborhoods; youth	Housing opportunities reflect emerging needs, changing demographics and are aligned with redevelopment projects, economic development objectives and sustainability goals (Address Emerging and Current

	Provision of Rental Units and Support Services for LI/ VLI Renters	High	Low- and very low-income renters; persons transitioning out of homelessness; renters in need of support services; public housing residents	Inventory of rental units and vouchers expanded to meet increased demand *(Increase Affordable Housing Opportunities);* Housing opportunities reflect emerging needs, changing demographics and are aligned with redevelopment projects, economic development objectives and sustainability goals *(Address Emerging and Current Needs and Changing Demographics)*
	Rental Rehabilitation	Low	Low- and moderate-income renters; low-income landlords; residents of low-income neighborhoods that are redeveloping or in transition; public housing residents	Inventory of rental units and vouchers expanded to meet increased demand *(Increase Affordable Housing Opportunities);* Housing opportunities reflect emerging needs, changing demographics and are aligned with redevelopment projects, economic development objectives and sustainability goals *(Address Emerging and Current Needs and Changing Demographics)*
	Down Payment Assistance	High	Low- and moderate-income residents who are "buyer ready"; first responders (fire, police, etc.)	Increased homeownership opportunities and support for long term affordability and accessibility for current homeowners. *(Increase Affordable Housing Opportunities)*
	Home buyer Training & Counseling	High	Low- and moderate-income home buyers; current renters	Increased homeownership opportunities and support for long term affordability and accessibility for current homeowners. *(Increase Affordable Housing Opportunities)*

D. Budget

D1. Describe the Proposed Budget for this Activity. Please explain in detail all budgeted expenses including contractual services, personnel services, commodities, and capital outlay. Also explain what the CDBG funds will be used for. Also explain the effect of not receiving any or only a portion of a CDBG allocation has on the project budget. **(Attach additional pages, if necessary)**

Through the efforts of more than 600 regular and intermittent volunteers, Kitchen Angels keeps our overhead expenses low so that nearly all of our funds goes directly to serving clients. In 2017, the budgeted amount for Client Food Services, which encompasses food purchase and preparation costs, is $271,000, or roughly 33% of our total operating budget. It is also 8% more than our 2016 Client Food Service expenditures. The following chart displays how we intend to allocate the CDBG funds. For the year ending December 31, 2016, our average cost per meal was $7.14. Full funding of this request will support the preparation and delivery of 4,201 meals.

Food Service Expenditure	CDBG Allocation	
Client Food	$17,476.00	58%
Kitchen Cleaning	$2,913.00	10%
Kitchen Equipment	$728.00	2%
Kitchen Repairs	$874.00	3%
Laundry	$2,184.00	7%
Packaging of meals for delivery	$4,369.00	15%
Supplies	$1,456.00	5%
Total Food Service	**$30,000.00**	**100%**

D.2 Please complete the following table to identify the funding sources and amounts. Indicate total project cost, total CDBG request and what funds or services, if any, the sponsor and/or other agencies will contribute. Also enter other committed funding sources (committed funds are funds available or will be available to fund the Activity during the CDBG Fiscal Year).

Type of funding	Source/Amount	Source/Amount	Source/Amount	Totals
Requested CDBG amount				**$ 30,000.00**
Other HUD funds i.e. HOME, Section 108				**$ -0-**
Other Federal Funds				**$ -0-**
City Funding i.e. Youth and Family, Human Services	Health & Human Services			**$ 50,000.00**
State Funding i.e. MFA				**$ -0-**
Other i.e. in-kind, private funds				**$752,140.00**
Total of all funding sources				**$831,140.00**

D.4 If you are proposing to utilize CDBG funds to pay for staff costs, please list each position title and the percentage of their salary and benefits that will be funded by CDBG. Depending on the Activity, listing this information does not guarantee the position will be funded by CDBG. It may not be eligible. Refer to the Overview.

PERSONNEL Position Title	New (Y/N)	% salary & benefits paid for with CDBG
N/A		

E. Performance Measurement System/Work Plan

CDBG/ Work Plan - FY 2017-2018

Provide the performance measurement goals, objectives and outcomes for your proposed CDBG project. Please refer to the Overview of the CDBG Program on page 14. Also, please attach a Work Plan for *your project.* The Work Plan should describe the goals, objectives and outcomes in greater detail and be:

1. Specific
2. Measurable
3. Achievable
4. Results-orientated
5. Time bound

We survey our clients regularly to learn how our services have impacted their lives, determine how well our services are meeting their needs and make any necessary adjustments. We look at Quality of Life, Access to Healthcare and Overall Satisfaction with Service. As a program serving a chronically or terminally ill population, not all clients will report improvements in their condition. Some are receiving end-of-life care while others are experiencing the effects of an increasingly debilitating illness.

Changes in diet brought about by changes in medical condition do not always coincide with clients perceiving an improvement in their diet or overall quality of life. Responses to measures that look at stabilized or improved weight, improved diet, and increased ability to live independently tend also to reflect the deteriorating condition *of many of these individuals.*

Numbers of overnight hospital stays and Emergency Department visits also fail to capture the appropriateness and complexity of those visits. We do not consistently know about clients' hospitalizations unless told by a neighbor or some other source or one of our delivery volunteers happens upon paramedics responding to a client's request for an ambulance.

Finally, changes in the way individuals access healthcare may reflect increased knowledge about how to best utilize ambulatory care rather than resorting to hospital-based care rather than improved overall health.

Quality of Life Measures

		2014 Results	2016 Results	2017 Target
Improved Weight		91.1%	96.9%	97%
Stable or Improved Diet		97.8%	99.0%	99%
Increased Ability to Live Independently		92.2%	95.0%	95%
Stable or Improved Quality of Life		97.8%	97.0%	99%

Access to Health Care Measures

	2014 Results	2016 Results	2016 Target
Improved Ability to Afford Medications	82.4%	76.3%	85%
Improved Ability to Afford to See Doctor	77.2%	69.8%	85%

The decline in both clients' ability to afford medications and their ability to afford to see their doctor from 2014 to 2016 is most likely an impact of the federal Affordable Care Act and the state's expansion of Medicaid enrolment, both of which may change in the near future.

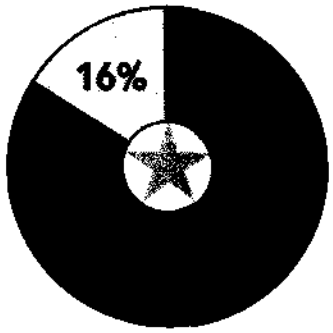
Kitchen Angels Service Measures

	2014 Results	2016 Results	2016 Target
Satisfied with Service	98.9%	99.0%	100%
Consume at least 50% of Meals	97.8%	93.8%	100%

KITCHEN ANGELS

2016 Volunteer Report

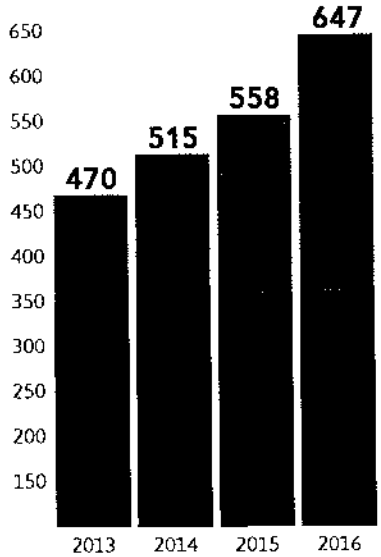
Longevity of our Volunteers



55% of our volunteers are long-term!

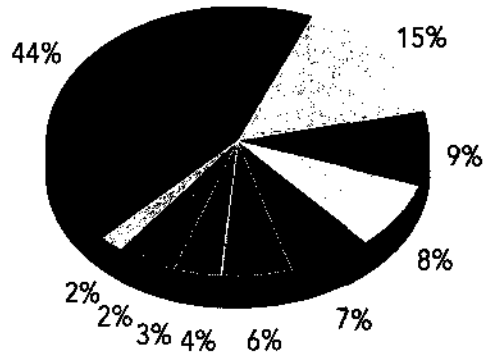
- <1 Year Active
- 1 - 5 Years Active
- 6 - 24 Years Active

Volunteers by Year



- Active Volunteers
- Visiting Volunteer

How Volunteers Hear About Kitchen Angels



- Word of Mouth
- Volunteers
- Advertising
- Online
- Programs
- Court
- Events/Outreach
- Church
- Schools
- Clients

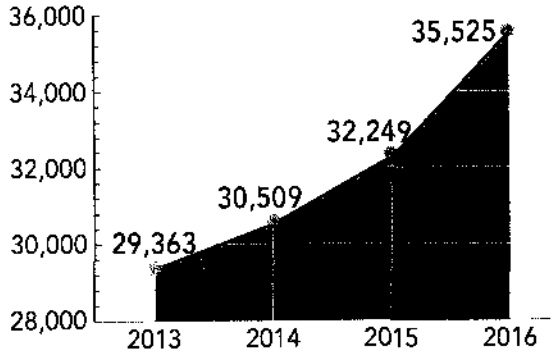
Active volunteers have worked a total of 1,892 years, an average of 5 years/person

254 Average number of volunteers in a typical week

17 differently-abled volunteers working at Kitchen Angels

230 incoming volunteers trained in 2016

Volunteer Hours by Year



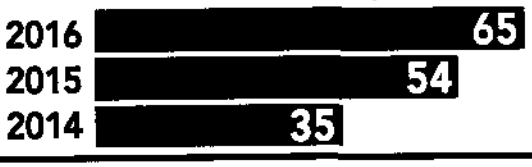
Gender Distribution of Volunteers

KITCHENALITY

64 volunteers

4,253 hours

Community Service Volunteers by Year



CITY OF SANTA FE
COMMUNITY DEVELOPMENT BLOCK GRANT (CDBG)
PROPOSAL SCORE SHEET / Bid Number '17/22/RFP

Name of Applicant/Project: Adelante. (CDBG)

Amount Requested: $ 30K.

Evaluation Criteria	Weighted Value	Evaluation Points 1 thru 5	Total Score	Max Score
Activity to be funded • Why needed? Does it address a gap? • Steps/phases to complete the activity • Who is served? • #s proposed to be served	20	X 5	100	100
National Objective Compliance • Benefits low/moderate income persons/households? • Prevents slum/blight • Does the activity serve residents Citywide or a Low to Moderate Income (LMI) Area (i.e. Census Tract)?	20	X 5	100	100
Consolidated Plan Compliance • Does the application demonstrate that it meets Consolidated Plan priorities?	10	X 5	50	50
Budget • Is proposed budget realistic? • Are other funding sources secured?	10	X 4	40	50
Performance Measurement/Work Plan • Are performance measurements, outcomes and proposed outcomes well presented? Realistic? Well-supported in the application? • Does the applicant have the administrative capacity to carry out the activity to be funded?	20	X 4	80	100
		Total Points	370.	**400**

CDC Evaluator Name

Signature

02/14/17
Date

CITY OF SANTA FE (CSF)
NON-DISCLOSURE AND CONFLICT OF INTEREST STATEMENT

REQUEST FOR PROPOSAL #'17/22/P

EVALUATOR NAME: John A. Padilla.

CSF policy is to prevent personal or organizational conflict of interest, or the appearance of such conflict of interest, in the award and administration of CSF contracts and Purchase Orders.

I, John A. Padilla., the undersigned, hereby certify that the following statements are true and correct and that I understand and agree to be bound by commitments contained herein.

I am acting at the request of CSF as a participant in the evaluation of *offers/ proposals* received in response to the *Request for Offers/ Request for Proposals,* entitled and/ or numbered I am acting of my own accord and not acting under duress. I am not currently employed by, nor am I receiving any compensation from, nor have I been the recipient of any present or future economic opportunity, employment, gift, loan, gratuity, special discount, trip, favor, or service in connection with any *offer/ proposal* or involved *Offeror/Proposer* in return for favorable consideration. I have no preconceived position on the relative merits of any of the *offers/ proposals* nor have I established a personal preference or position on the worth or standing of any *Offeror/ Proposer* participating in this action. CSF policy is to prevent personal or organizational conflict of interest, or the appearance of such conflict of interest, in the award and administration of CSF contracts, including, but not limited to contracts for professional services, agreements with consultants and Purchase Orders.

I hereby certify that to the best of my knowledge and belief, no conflict of interest exists that may diminish my capacity to perform an impartial, technically sound, objective review of this proposal(s) or otherwise result in a biased opinion or unfair competitive advantage.
I agree not to disclose or otherwise divulge any information pertaining to the contents, status, or ranking of any *offer/ proposal* to anyone other than the team leader or other evaluation team members. I understand the terms and "disclose or otherwise divulge" to include, but are not limited to, reproduction of any part or any portion of any *offer/ proposal,* or removal of same from designated areas without prior authorization from the evaluation team leader. I agree to perform any and all evaluations of said *offers/ proposals* in an unbiased manner, to the best of my ability, and with the best interest of CSF paramount in all decisions.
I agree to return to CSF Purchasing Department all copies of proposals, as well as any abstracts, upon completion of the evaluation.

02/4/17

SIGNATURE AND DATE:

City of Santa Fe Community Development Block Grant Program FY 2017-2018	
Name of Nonprofit Organization:	SFPS Adelante Program
Name of Executive Director:	Superintendent Veronica Garcia
Name of Board President:	*Susan Duncan*
Name, Contact Information (Address, Phone, and Email) of Person Submitting Request (Fiscal Agent if appropriate):	Gaile Herling, Adelante Coordinator mail: 610 Alta Vista Santa Fe, NM 87505 phone: 505-490-1970 email: gherling@sfps.k12.nm.us
Amount Requested:	$30,000
Program Name or Service being requested for Funding:	Expanded Elementary Liaison Project

Brief Program or Service Description:
CDBG funds helped to implement the Elementary Liaison Project for up to 100 families *during SY2016-17. Now, we propose to expand this project to provide multi-level* services for up to 200 families.

Check which Category Describes your organization:
1. Private Non-Profit
1. For Profit
1. Public Agency
   1. Government Agency -- XX

DUNS or CAGE #	097144281
Business Registration #	NA
Tax ID #	85-6000169
State CRS #	NA

Check One:	• X -- Previous Recipient • New Applicant	

Funding Categories to be Addressed (Circle one):
- XX - Public Service

Project Proposal Summary
(If funded, the following will be written into the contract Scope of Services with Accomplishment Levels along with details provided in Section A)

Activity Name	Expanded Elementary Liaison Project
Brief Summary of the activity	The Elementary Liaison Project is now in its second year, linking Adelante parents, their children from K-6th grade, the Adelante case manager and school personnel in order to promote the children's success through accessing stable housing, public benefits and family well-being via more effective services, resources, referrals and linkages. This strategy of focusing on elementary age children who are experiencing homelessness works on two levels: One, it provides a way to build relationship with the parents indirectly and maintains contact to help stabilize the family; Second, it responds to research that shows education is the largest single factor in preventing adult homelessness among children who are currently experiencing homelessness. Since Adelante staff members' observations confirm research that children have already selected their types of careers by 5th grade, then elementary school is a crucial time for expanding students' views of themselves and their place in the community.A significant majority of adults in homeless situations experienced homelessness when young, without much intervention or appropriate services. Therefore, if a student's basic needs are met with early intervention, then homelessness becomes less of a possibility as they grow into adulthood. During School Year 2016-17, Adelante has been funded by CDBG to impact up to 100 families/400 children. Next year, we propose to expand the project to impact up to 200 families/600 children. SFPS Adelante will hire another part-time Elementary Liaison and also make use of a Highlands University BSW Intern as an assistant for the Elementary Liaison Project.

Amount of CDBG funding requested for Activity	**$30,000**
Total budget of Activity	**$90,541**

To the best of my knowledge and belief, all data in this application is true and correct. If funded, I certify that the Applicant Organization is willing and able to adhere to the polices and procedures specified by the City of Santa Fe and all applicable program regulations of the US Department of Housing and Urban Development. Further, I understand there is not an agreement until the City of Santa Fe and the individual authorized to execute contracts on behalf of the Applicant Organization has signed the contract.

Authorized Signature	Title:	Date
Veronica C. Garcia	Superintendent	1.30.17

(sign in blue ink)

CDBG funds can be used for specific Eligible Activities as outlined in the Overview. Select one type of Eligible Activity category that best describes your Project.

Type of Eligible Activity (check one)

Activities Related to Housing	
Other Real Property Activities	
Public Facilities/Improvements	
Public Service	X

Section A: Activity to be funded

A1. Briefly describe the Activity you are requesting to fund with CDBG. This will help determine eligibility.

The Expanded Elementary Liaison Project will focus on accessing affordable, safe, stable housing and supportive services as well as success in school for the largest growing population of those experiencing homelessness both nationally and locally--elementary age children and their families.

SFPS Adelante will expand the Elementary Liaison Project to hire 1.5 liaisons and obtain a free BSW Intern to work with up to 600 children and their families who are housing unstable/experiencing homelessness in Santa Fe Public Schools. This project would reach almost 100 % of Adelante's current elementary students. Annually, Adelante usually serves 700+ elementary students by the end of June. With 20 elementary schools to cover, this would be a realistic model to pursue providing effective services, linkages and obtaining resources to ameliorate gaps in students' lives. The liaison will partner with Adelante's case managers, parents of the children, school nurses, counselors, secretaries, teachers, social workers, administrators and other agencies to obtain and ensure appropriate resources for the students. The goal is to provide enough support for the student to achieve in school and for the family to stabilize, eradicating the homelessness as soon as possible.

A2. Why is this Activity needed? Does it address a gap? Describe the degree of need, or the severity of a problem including cause, extent, location, frequency and duration that will be addressed by the project. Provide a description of service gaps the activity fills in the community. Additionally, supply data, such as demographics, reports and/or other information supporting your information and proving the need exists. **(Attach additional pages, if necessary)**

SFPS Adelante annually serves a minimum of 1,700 students and siblings in housing unstable/homeless situations, with children from age 5 to 12 in the majority. In School Year 2015-16, Adelante identified 710 children attending elementary schools in unstable housing/homelessness – 42 % of our entire population.

About 1 in 10 SFPS students experiences housing instability/homelessness. The majority of students experiencing homelessness are hungry, experience much instability, have not achieved their potential in school and face significant family health issues. They experience more stress and trauma related ailments, and school failure rates than their permanently housed peers. Half of Adelante's students' families are Latino immigrants or have mixed immigrant status, meaning they often face language barriers, greater fear and other challenges to accessing appropriate services and resources.

According to national research, children experiencing homelessness are sick four times more often than other children. They go hungry at twice the rate of their permanently housed peers; have high rates of obesity due to nutritional deficiencies and have three times the rate of emotional and behavioral problems compared to non-homeless children. By age 12, 83% of children experiencing homelessness have been exposed to at least one serious violent event and about 25% have witnessed acts of violence in their families. Children experiencing homelessness/housing instability are four times more likely to show developmental delays and twice as likely to have learning disabilities as non-homeless children.

Adelante's niche is serving families connected with the public schools that qualify as homeless under the federal McKinney-Vento Homeless Assistance Act. Adelante's focus is to stabilize and improve housing situations through case management and supportive services that empower families to maintain their housing once obtained.

Adelante works with the highest risk families, since their housing is unstable and they often have the least resources. Many of our families couch surf or access appropriate housing for short periods due to: lack of decently paid, consistent work; a serious illness in the family; untreated substance abuse or mental health issues; lack of necessary adult support; lack of legal immigration status; and tenant - landlord issues that impact the family's ability to stay housed.

Most Adelante families are in unstable housing or homeless situations because Santa Fe has a dearth of affordable rentals, particularly when compared with their income. About half of Adelante's approximately 800 families have mixed immigration status, which often means that when a parent can work, their pay is far below the Living Wage, since they are usually too frightened to report wage theft. Mujeres de Adelante is a women's cooperative created by immigrant mothers that can't earn enough to pay for long term housing and most of these families live doubled or tripled up in one bedroom apartments. The participants take Spanish GED class, learn English and have slowly increased their family income as they learn new skills and sell their wares for donations at crafts fairs. The Elementary Liaisons can help mothers that they meet and speak with about their children to join the co-op and gain new confidence and skills, which promotes family wellness and empowers the mother towards accessing public benefits and stable housing.

Adelante families usually have at least one member with a serious health issue, which means that most available resources are spent on health care (especially for immigrant families) and decent housing has to take a lower priority. Evictions and utility disconnects are common amongst our families: if a breadwinner becomes ill or loses their job or their transportation, or if a family member that helped to provide support moves out, then the family may be on the street or moving to another unstable situation. Landlords in Santa Fe have the power to evict tenants, even when it is illegal for them to do so, since most tenants have nowhere to turn for proper legal information and advocacy about tenants' rights. The Elementary Liaison can help prevent these unfortunate and sometimes unjust situations from occurring, since they can get to know the parent through providing basic aid and services to their children, and link the family with our case manager or another appropriate agency. The Elementary Liaison can also identify the common themes that our families share and initiate trainings on important issues, such as tenants' rights, health care, wage theft, etc.

From August 2016 until Jan. 24th, 2017, SFPS Adelante has used our Homeless *Emergency Fund and leveraged funds from* elsewhere to prevention eviction and/or utility disconnect/reconnect for 113 families with 271 children. The Elementary Liaisons will increase this number significantly, since they will be in close contact with the teachers, counselors and others that hear which children are living without utilities or without a home.

The Expanded Elementary Liaison Project will ensure that all of Adelante's elementary students, who are the majority population in our program, and their families will have access to a trauma-informed professional with expertise about the effects of homelessness on children and knowledge of our community's resources. The project will finally have enough funds to go to every elementary school (Adelante students are in every school) weekly or more often as needed, to check in with the school personnel regularly, to respond quickly during crises and help to access housing, resources, programs, agency services and all types of support for Adelante's elementary students and their families. They will keep extensive logs and data -- now collected on a detailed 6-page template which was assisted in design and approved

by the City of Santa Fe's Children and Youth Commission. The data captures services rendered and outcomes for our seniors, who are graduating now at a high rate. Focusing on the students' gaps, needs and successes, the Elementary Liaisons will provide easier access to stable housing, supportive services and public benefits, greater school bonding, higher school success and decreased transience, which all translates to more stable families that decrease homelessness in Santa Fe.

3. If applicable, what steps or phases will be taken to complete the Activity (provision of services, engineering/design, advertising, bidding, contract award, construction, etc.)?

1. Hire part-time Elementary Liaison by August 1, 2017.
2. Train elementary school staff members to identify and refer students that they believe may be experiencing homelessness by end of Oct., 2017.
3. Screen families to confirm qualifications for Adelante services and begin plan of action. Meet with school personnel, parents, students (when appropriate) and any relevant community providers to conduct needs assessments and provide assistance.Ongoing.
4. Partner with Adelante case manager and school/community personnel by linking them together to form a safety net of effective services around the student and family. Ongoing.
5. Follow up with family, school, case manager and community agencies to ensure that needs are being addressed. Ongoing.
6. Collect and provide data and reports by end of 4 quarters throughout the year re:CDBG reporting cycle.

4. Describe the population that the Activity will serve and how this population will be served. Describe the outreach and recruitment activities which will be conducted to make the proposed activity services known and accessible to the targeted population. Please include where these outreach and recruitment activities will take place.

The Expanded Elementary Liaison Project will provide outreach mostly at schools, through trainings with school faculties, meeting with school counselors, nurses, secretaries/registrars and administrators. We will also participate in school fairs, open houses, community events and through posting flyers at libraries, soup kitchens, shelters, clinics, schools, Head Start/Early Head Start, United Way, laundromats and community agencies. Adelante also receives referrals through community agencies serving children and families living in poverty and/or homelessness.

The population served are children, ages 5 through 12 and their families living in unstable housing/homelessness. Most of these children live in chaotic situations, overcrowded conditions, sometimes without proper bedding and without consistent adults in their lives. They are at high risk for failing at school and they have a higher rate

of stress-related illnesses. Many are expected to babysit their younger siblings and/or be caregivers to the adults in their lives, which leads to an abysmal drop-out rate even before they reach high school, as well as behavioral health concerns.

5. Estimate the number of total persons / households that will benefit from the CDBG funded portion of this Activity: (Fill in Households OR Persons depending on the type of Activity you are providing).

Total number of clients you anticipate serving:		
Households:	**OR**	Persons:600

6. Use the following Table 1 to break out the number of persons you anticipate serving at the low (30-50% AMI) and very low-income (< 30% AMI) levels and the type of client (Refer to overview of CDBG program for the most recent income amounts). Along with income, please anticipate the number of clients that are severely disabled adults, homeless persons, abused children, battered spouses, and illiterate adults, persons with AIDS, migrant farm workers, and elderly. (All of these clients fall under the presumed benefit categories as defined by CDBG and therefore, all under low or extremely low income). This would apply mainly to Public Service or Public Facilities/Improvements Activities.

Extremely Low Income (<30% AMI)	Low Income (31-50%)	Moderate Income 51-80%	Illiterate adults	Abused children	Severely Disabled Persons	Migrant Farm Workers	Elderly	Persons with AIDS	Homeless Persons
600									600

Table 1

7. Use the following Table 2 to breakout the number of households you anticipate serving at the income levels listed. (Refer to the 2016 AMI table on pg. 18 for the most recent income amounts). This would apply mainly to CDBG funding for housing projects such as Down Payment Assistance and Rehabilitation Activities.

Extremely Low Income (<30% AMI)	Low Income (31-50%)	Moderate Income (51-80%)	Non-low Moderate Income (81-100%)	Female Head of Household
600				

Table 2

8. CDBG funded construction activities must be in compliance with local land use plans and zoning. Explain how the proposed activity conforms to local plans and zoning ordinances. Provide a copy of the page(s) of resource document(s), pertinent sections, and page(s). This only applies to projects where the CDBG funds will used for the actual construction, not acquisition.

NA

9. Please describe the organization in terms of its administrative capacity and its qualifying experience and length of experience with activities or projects similar to the proposed Activity. Include purpose, goals, programs, activities, clients, and accomplishments, if any, in the area of activity for which funding is requested. Give examples of and list experience.

Founded in 2003, Adelante Program is a community based program of Santa Fe Public Schools Office of Student Wellness. Our mission is to empower the 1,700+ children and youth experiencing homelessness/unstable housing that we work with to reach academic and life success, by accessing affordable, safe housing and public benefits, and by equalizing opportunities through providing culturally competent services and resources. We view education, including higher education, as the route out of poverty and homelessness. As the only local organization that focuses on students, their siblings and families experiencing homelessness, SFPS Adelante is a recognized community leader that collaborates with all children's providers and homeless agencies.

SFPS Adelante won Santa Fe Community Foundation's 2014 Pinon Award and our Mujeres de Adelante women's cooperative won the NM Community Foundation's Chispa Award. Adelante's co-founder and coordinator also earned a "Ten Who MAke a Difference" award for Adelante's innovative programming.

Over the past several years, Adelante seniors have been graduating at rates from 78% up to 100%. As mentioned earlier, we help hundreds of families maintain stable housing annually, through our emergency fund and two anonymous foundations that also donate towards a family's eviction prevention or utility reconnect. Adelante's drop-out rate has been improving as well as access to college and financial aid for our

students. All of these factors point to the fact that Adelante is succeeding in our programs and reaching closer always towards our goals.

Since 2008, Adelante has provided secondary liaisons, which is the model we have revised and utilized for the Elementary Liaison Project these past two years. It has been very successful in providing a safety net for the whole family and for support in moving towards stable housing and planning beyond crisis. In addition to the elementary and secondary liaisons, and the women's cooperative, Adelante's services include: case management for the adults that our children/youth live with; a weekly evening family program ,"Juntos los Miercoles," with dinner, art, parent education, donations of groceries, clothes and books; a part-time early childhood specialist working with families in homeless situations that have children from birth through age 4 ; an emergency fund and financial assistance; the "Mimi Hatch Memorial Scholarship Fund" and other college scholarships for Adelante students; collaboration with SF Dreamers Project to provide free immigration legal assistance; access to: free after school and tutoring programs; transportation, backpacks and school supplies, clothing, a Food Pantry, diapers, hygiene items, furniture and household goods.

SFPS Adelante sponsors the region's only Homeless Youth & Children Task Force, comprised of more than a dozen children's agencies that work together on challenges facing homeless families. Currently, the HYCTF has a Collaborative Shelter Working Group that is partnering with the interfaith community and the City to provide shelter and supportive services for youth age 18 through 24 years.

10. : Briefly describe your organizations experience in government contract administration, and knowledge of federal regulations governing acquisition, procurement, equal employment opportunity, and labor standards.

SFPS Adelante has 15 years' experience writing grants and reports for funding from federal, state, Public Education Department, City and private foundations. We have six years' experience with CDBG funds and requirements. Santa Fe Public Schools maintains strict guidelines mandated by the state for procurement, acquisition and equal opportunity regulations.

SFPS Board policies result from federal government requirements of public school agencies. SFPS procurement is governed by PED's strict guidelines that require three quotes for all significant purchases and must be approved before purchase is made. Every purchase is documented with receipts or invoices and is included in accounting reports by the designated SFPS accountant.

SFPS Board policy prohibits discrimination in hiring based on race, color, religion, age, sex, national origin or ancestry, ethnicity, disability, serious medical condition, sexual

orientation, gender identity, veteran status, HIV status, genetic information or any other protected status as defined by law, in all aspects of employment, including recruitment, hiring, firing, pay, job assignments, supervision, promotions, layoffs, training, benefits, or any other term or condition of employment.

SFPS Adelante keeps all student, family and client information strictly confidential as required by FERPA, including locking all files daily.

Policies and procedures that all SFPS programs must follow may be viewed in the Board of Education Manual online at **www.sfps.info/sfps/data/reposcode/schoolpolicies/schoolpolicies.html.**

B. National Objective Compliance

1. Benefits Low/ Moderate Income persons/households by:	
Area Benefit (eligible area) (LMA)	
Limited Clientele (LMC)	XX
Housing Activities (LMH)	
Job Creation or Retention (LMJ)	

2. Is the service area city wide: (X) yes

3.

If an activity is based on an area benefit, identify the Census Tract(s) and Block Group(s) that will be served. Make sure to read the Overview for a clear understanding of the requirements of an area benefit. Attach a map of the area. -- NA

Census Tract	Block Group	Total Population	Low/Mod Income Population	% Low/ Mod Income
Total				

4. **Explain fully how the proposed project meets the CDBG National Objective selected above.** Provide substantiating documentation supporting the claims. Refer to Overview for more detail.

Adelante's Expanded Elementary Liaison Project meets the National Objective of serving Low-to-Moderate Income Clientele through working with the Limited Clientele category of Homeless PErsons. The Project's objective is to create suitable, stable living conditions for families living in high risk/homeless situations as defined under the federal McKinney-Vento Homeless Assistance Act, which includes families doubling up in overcrowded conditions, couch-surfing, children living with others instead of their parents, being evicted or living without utilities. The outcome is to provide accessibility to safe, affordable and long term housing in addition to other essential services that support stability of families with children up through age 13.

This will be accomplished by providing one full-time and one half-time elementary liaison to assist approximately 200 families with up to 600 children with the public service of accessing affordable housing, programs, benefits and services that promote stable housing and family well-being. The elementary liaisons will link students and their families with tools and resources for achievement and stability: tutoring; after school and summer programs; material aid for basic needs; weekly evening programs; legal assistance; counseling and other behavioral health services; applications for housing, public benefits, Social Security; emergency financial aid and employment assistance.

C. Consolidated Plan Compliance

The City of Santa Fe provides guidance in its 2013-2017 Consolidated Plan on funding uses, whether Federal, State, City, or Private. In accordance with federal regulations, each project must be consistent with the priorities outlined in the City's Consolidated Plan. (See Consolidated Plan on City website) Mark the **one priority** that the proposed project will meet.

25. Priority Needs

Check	Priority Need Name	Priority Level	Population Served	Goals Addressed

	Rental Vouchers	High	Extremely low-income renters; people at risk of being homeless; persons with disabilities; homeless youth; veterans; elderly; families in transition; persons with HIV/AIDS and their families; public housing residents; mentally ill; chronic substance abusers; victims of domestic violence	Reduced rate of cost burden and corresponding drop in poverty rate for homeless households and those in danger of becoming homeless. *(Increase Opportunities for At Risk Populations);* Inventory of rental units and vouchers expanded to meet increased demand *(Increase Affordable Housing Opportunities)*
	Emergency Shelter (note could be classified as Public Service which is restricted in allocation amount)	High	Extremely low-income residents; chronic homeless; homeless youth; veterans; families in transition; mentally ill; chronic substance abusers; victims of domestic violence	Reduced rate of cost burden and corresponding drop in poverty rate for homeless households and those in danger of becoming homeless. *(Increase Opportunities for At Risk Populations)*
XX	Support Services for Homeless or People at Risk of Homelessness (note could be classified as Public Service which is restricted in allocation amount)	High	Extremely low-income renters; people at risk of being homeless; persons with disabilities; homeless youth; veterans; elderly; families in transition; persons with HIV/AIDS and their families; public housing residents; mentally ill; chronic substance abusers; victims of domestic violence	Reduced rate of cost burden and corresponding drop in poverty rate for homeless households and those in danger of becoming homeless. *(Increase Opportunities for At Risk Populations)*
	Refinancing Services and Support for Current Homeowners	High	Low-income homeowners; homeowners in risk of foreclosure; homeowners in substandard housing	Reduced rate of cost burden and corresponding drop in poverty rate for homeless households and those in danger of becoming homeless. *(Increase Opportunities for At Risk Populations);* Increased homeownership opportunities and support for long term affordability and accessibility for current homeowners. *(Increase Affordable Housing Opportunities)*

Priority Needs (cont.)

Check	Priority Need Name	Priority Level	Population Served	Goals Addressed
	Homeowner Rehabilitation Programs, Energy-efficiency Upgrades, Accessibility Retrofits	High	Low- and moderate-income homeowners; residents in redeveloping or transitioning neighborhoods; homeowners living in aging or substandard housing stock; seniors who need to "age in place;" people with disabilities	Increased homeownership opportunities and support for long term affordability and accessibility for current homeowners. *(Increase Affordable Housing Opportunities);* Housing opportunities reflect emerging needs, changing demographics and are aligned with redevelopment projects, economic development objectives and sustainability goals *(Address Emerging and Current Needs and Changing Demographics)*
	Construction of affordably-priced homes for homeownership	Low	Low- and moderate-income homebuyers and current renters; local workforce	Increased homeownership opportunities and support for long term affordability and accessibility for current homeowners. *(Increase Affordable Housing Opportunities)*
	Fair Housing Outreach	High	Low- and moderate-income renters; low-income landlords; persons with disabilities; Spanish speakers; large families; general public	Housing opportunities reflect emerging needs, changing demographics and are aligned with redevelopment projects, economic development objectives and sustainability goals *(Address Emerging and Current Needs and Changing Demographics)*
	Diversity of Housing Types	Low	Low- and moderate-income renters; seniors; small households; entrepreneurs; aging veterans; entrepreneurs and other self-employed	Housing opportunities reflect emerging needs, changing demographics and are aligned with redevelopment projects, economic development objectives and sustainability goals *(Address Emerging and Current Needs and Changing Demographics)*
	Non-Housing Community Facilities and Services	High	Low- and moderate-income residents; residents in redeveloping or transitioning neighborhoods; youth	Housing opportunities reflect emerging needs, changing demographics and are aligned with redevelopment projects, economic development objectives and sustainability goals *(Address Emerging and Current Needs and Changing Demographics)*

Priority Needs (cont.)

Check	Priority Need Name	Priority Level	Population Served	Goals Addressed
	Provision of Rental Units and Support Services for LI/ VLI Renters	High	Low- and very low-income renters; persons transitioning out of homelessness; renters in need of support services; public housing residents	Inventory of rental units and vouchers expanded to meet increased demand *(Increase Affordable Housing Opportunities);* Housing opportunities reflect emerging needs, changing demographics and are aligned with redevelopment projects, economic development objectives and sustainability goals *(Address Emerging and Current Needs and Changing Demographics)*
	Rental Rehabilitation	Low	Low- and moderate- income renters; low-income landlords; residents of low- income neighborhoods that are redeveloping or in transition; public housing residents	Inventory of rental units and vouchers expanded to meet increased demand *(Increase Affordable Housing Opportunities);* Housing opportunities reflect emerging needs, changing demographics and are aligned with redevelopment projects, economic development objectives and sustainability goals *(Address Emerging and Current Needs and Changing Demographics)*
	Down Payment Assistance	High	Low- and moderate- income residents who are "buyer ready"; first responders (fire, police, etc.)	Increased homeownership opportunities and support for long term affordability and accessibility for current homeowners. *(Increase Affordable Housing Opportunities)*

	Homebuyer Training & Counseling	High	Low- and moderate-income homebuyers; current renters	Increased homeownership opportunities and support for long term affordability and accessibility for current homeowners. *(Increase Affordable Housing Opportunities)*

D. Budget

D1. Describe the Proposed Budget for this Activity. Please explain all budgeted expenses including contractual services, personnel services, commodities, and capital outlay. Also explain what the CDBG funds will be used for. Also explain the effect of not receiving any or only a portion of a CDBG allocation has on the project budget.

SFPS Adelante Expanded Elementary Liaison Project - Total Proposed Budget 2017-18

Category	Amount	Purpose
Contractual Services	2,061	indirect cost: fiscal fee of SFPS, based upon mandated PED amount -- 2.33%
Personnel Services	88,480	Full-time Elementary Liaison: 36,500 1 FTE + 40% benefits half-time Elementary Liaison: 18,000 .5 FTE + 40% benefits *coordinator for oversight:* 5,000 .10 FTE + 40% benefits
	TOTAL: 90,541	The full-time liaison (40 hours) oversees Adelante students in 12 elementary schools. The half-time liaison (approx. 20 hrs.) oversees Adelante students in 8 elementary schools. The coordinator will spend about 5 hours per week supervising the project.

CDBG funds will be used for:

- 38% of the full time Elementary Liaison's hours + benefits (approx. 16 hrs. weekly) = $19,650
- 38% of the half-time Elementary Liaison's hours + benefits (approx. 8 hrs. weekly) =
  $9,651
- 2.33% indirect cost, fiscal fee of SFPS, mandated by PED based on $30,000= $699

There will be no capital outlay funds nor commodity purchasing. *All school supplies*, backpacks and uniform clothing are purchased through other grants, already included in our K-12 Supplies Project; therefore, it does not require special funding from other projects.

If CDBG funds were denied, Adelante would search elsewhere for funds, since it is crucial to expand this project, in order to find gaps and needs that must be met for our students and their families to access housing, supportive services, stability and to eradicate/prevent child homelessness.

2. **Please complete the following table to identify the funding sources and amounts.** Indicate total project cost that incorporates the total CDBG request and what funds or services, if any, the sponsor and/or other agencies will contribute. Also enter other ***committed*** funding sources (committed funds are funds available or will be available to fund the Activity during the CDBG Fiscal Year). *Please be as accurate as possible. Should* your organization be awarded funding, a revised budget (as needed) will become an Addendum to the CDBG Contract.

Type of funding	**Source/ amount**	**Source/ amount**	**Source/ amount**	**Totals**
Requested CDBG amount				**$30,000**
Other HUD funds i.e. HOME, Section 108				**$0**
Other Federal Funds	Title One 25,000			**$25,000**
***City Funding i.e. Youth and* Family, Human Services**				**$**
State funding, i.e. MFA	McKinney-Vento via PED 20,000			**$20,000**
Other i.e. in- kind, private funds	Kind World Foundation 15,541			**$15,541**

Total of all funding sources	**$90,541**

3. **If you are proposing to utilize CDBG funds to pay for staff costs, please list each position title and the percentage of their salary and benefits that will be funded by CDBG.** Depending on the Activity, listing this information does not guarantee the position will be funded by CDBG as it may not be eligible.

PERSONNEL Position Title	**New (Y/N)**	**% salary & benefits paid for with CDBG**
full time Elementary Liaison	N	38% (includes 40% benefits)
part-time Elementary Liaison	Y	38% (includes 40% benefits)

E. Performance Measurement System/Work Plan

CDBG/ Work Plan - FY 2017-2018

Provide the performance measurement goals, objectives and outcomes for your proposed CDBG project. Please refer to Exhibit B at the end of this document. Based on these measurements, attach a Work Plan that describes the goals, objectives and outcomes in greater detail and be:

B. Specific
C. Measurable
D. Achievable
E. Results-orientated
F. Time bound

CDBG Work Plan -- 2017-18 - SFPS Adelante Program
Expanded Elementary Liaison Project

City of Santa Fe's Performance Measurement Goal:
In compliance with the City's Consolidated Plan, the Expanded Elementary Liaison Project's goal is to increase opportunities for high risk and homeless populations, by reducing the rate of households with cost burden and corresponding drop in poverty rates.

Adelante's Goal: Promote family stability towards long term housing and promote a successful education for children age 5-13 in order to help reduce homelessness and poverty rate.

City's Objective: To create a suitable living environment
Adelante's Objective: Provide bilingual, effective support services, including case management, linkages, warm hand-offs for referrals, advocacy, material aid and financial assistance, to help access housing and long term benefits that will reduce homelessness -- for up to 200 families experiencing homelessness, including monolingual Spanish speakers and mixed immigrant status with approximately 600 elementary school children, from August 1, 2017 until June 30, 2018.

Results will be measured by the Elementary Liaisons in three ways:

- number of families and elementary children served
- services provided
- # of families/children who either maintained stable housing or accessed long term housing with Liaisons' assistance

Data will be collected through log notes and also through a new template that SFPS Adelante has developed in partnership with and was approved by the City of Santa Fe.

CITY OF SANTA FE
COMMUNITY DEVELOPMENT BLOCK GRANT (CDBG)
PROPOSAL SCORE SHEET / Bid Number '17/22/RFP

Name of Applicant/Project: Esperanza (CDBG)

Amount Requested: $ 32,500.00

Evaluation Criteria	Weighted Value	Evaluation Points 1 thru 5	Total Score	Max Score
Activity to be funded • Why needed? Does it address a gap? • Steps/phases to complete the activity • Who is served? • #s proposed to be served	20	X 5	100	100
National Objective Compliance • Benefits low/moderate income persons/households? • Prevents slum/blight • Does the activity serve residents Citywide or a Low to Moderate Income (LMI) Area (i.e. Census Tract)?	20	X 4	80	100
Consolidated Plan Compliance • Does the application demonstrate that it meets Consolidated Plan priorities?	10	X 5	50	50
Budget • Is proposed budget realistic? • Are other funding sources secured?	10	X 5	50	50
Performance Measurement/Work Plan • Are performance measurements, outcomes and proposed outcomes well presented? Realistic? Well-supported in the application? • Does the applicant have the administrative capacity to carry out the activity to be funded?	20	X 5	100	100
		Total Points	380.	**400**

CDC Evaluator Name

Signature

07/14/17
Date

CITY OF SANTA FE (CSF)
NON-DISCLOSURE AND CONFLICT OF INTEREST STATEMENT

REQUEST FOR PROPOSAL #'17/22/P

EVALUATOR NAME: John A. Padilla.

CSF policy is to prevent personal or organizational conflict of interest, or the appearance of such conflict of interest, in the award and administration of CSF contracts and Purchase Orders.

I, John A. Padilla., the undersigned, hereby certify that the following statements are true and correct and that I understand and agree to be bound by commitments contained herein.

I am acting at the request of CSF as a participant in the evaluation of *offers/ proposals* received in response to the *Request for Offers/ Request for Proposals,* entitled and/ or numbered
I am acting of my own accord and not acting under duress. I am not currently employed by, nor am I receiving any compensation from, nor have I been the recipient of any present or future economic opportunity, employment, gift, loan, gratuity, special discount, trip, favor, or service in connection with any *offer/ proposal* or involved *Offeror/Proposer* in return for favorable consideration. I have no preconceived position on the relative merits of any of the *offers/ proposals* nor have I established a personal preference or position on the worth or standing of any *Offeror/ Proposer* participating in this action. CSF policy is to prevent personal or organizational conflict of interest, or the appearance of such conflict of interest, in the award and administration of CSF contracts, including, but not limited to contracts for professional services, agreements with consultants and Purchase Orders.

I hereby certify that to the best of my knowledge and belief, no conflict of interest exists that may diminish my capacity to perform an impartial, technically sound, objective review of this proposal(s) or otherwise result in a biased opinion or unfair competitive advantage.
I agree not to disclose or otherwise divulge any information pertaining to the contents, status, or ranking of any *offer/ proposal* to anyone other than the team leader or other evaluation team members. I understand the terms and "disclose or otherwise divulge" to include, but are not limited to, reproduction of any part or any portion of any *offer/ proposal,* or removal of same from designated areas without prior authorization from the evaluation team leader. I agree to perform any and all evaluations of said *offers/ proposals* in an unbiased manner, to the best of my ability, and with the best interest of CSF paramount in all decisions.
I agree to return to CSF Purchasing Department all copies of proposals, as well as any abstracts, upon completion of the evaluation.

SIGNATURE AND DATE: 02/14/17

Cover Page

City of Santa Fe Community Development Block Grant Program FY 2017-2018	
Name of Nonprofit Organization:	Esperanza Shelter for Battered Families
Name of Executive Director:	Marsie Silvestro
Name of Board President:	Marcos Zubia
Name, Contact Information (Address, Phone, and Email) of Person Submitting Request (Fiscal Agent if appropriate):	Jorge Fonseca, Finance Manager 3130 Rufina Street Santa Fe, NM 87507 (505) 474-5536
Amount Requested:	$32,500
Program Name or Service being requested for Funding:	Emergency Housing Assistance Program
Brief Program or Service Description:	Esperanza's Emergency Assistance Program helps victims of domestic violence with 60 days of rent payments and assistance with utility payments.
Check which Category Describes your organization: 8. Private Non-Profit 9. For Profit 10. Public Agency 11. Government Agency	✓ Private non-profit
DUNS or CAGE #	182615880
Business Registration #	10-00047741
Tax ID #	85-0313174
State CRS #	01-190955-00-2
Check One:	☒ Previous Recipient ☐ New Applicant
Funding Categories to be Addressed (Circle one):	☑ Housing ☐ Public Facility ☐ Public Service

Project Proposal Summary
(If funded, the following will be written into the contract Scope of Services with Accomplishment Levels along with details provided in Section A)

Activity Name	Emergency Housing Assistance Program
Brief Summary of the activity	Funds will assist victims of domestic violence with rental and utility payments.

Amount of CDBG funding requested for Activity	$32,500
Total budget of Activity	$32,500

To the best of my knowledge and belief, all data in this application is true and correct. If funded, I certify that the Applicant Organization is willing and able to adhere to the polices and procedures specified by the City of Santa Fe and all applicable program regulations of the US Department of Housing and Urban Development. Further, I understand there is not an agreement until the City of Santa Fe and the individual authorized to execute contracts on behalf of the Applicant Organization has signed the contract.

Marie Silvestre	Executive Director	February 1, 2017
Authorized Signature *(sign in blue ink)*	Title	Date

CDBG funds can be used for specific Eligible Activities as outlined in the Overview. Select one type of Eligible Activity category that best describes your Project.

Type of Eligible Activity (check one)

Activities Related to Housing	X
Other Real Property Activities	
Public Facilities/Improvements	
Public Service	

Section A: Activity to be funded

A1. Briefly describe the Activity you are requesting to fund with CDBG. This will help determine eligibility.

Esperanza seeks funding to assist low-income domestic violence clients in emergency situations while seeking safety. Assistance consists of the following: providing essential temporary emergency housing to include house/rental payments and utility payments.

Often the abusers have controlled all the money and forbidden their partners to work.

Some clients lack job skills or experience to immediately pursue work, therefore the client is often facing homelessness.

A2. Why is this Activity needed? Does it address a gap? Describe the degree of need, or the severity of a problem including cause, extent, location, frequency and duration that will be addressed by the project. Provide a description of service gaps the activity fills in the community. Additionally, supply data, such as demographics, reports and/or other information supporting your information and proving the need exists. **(Attach additional pages, if necessary)**

Each year, Esperanza provides a variety of services to approximately 1,000 people.

Esperanza serves the city of Santa Fe; the entire Santa Fe County and the eight Northern Pueblos.

We are frequently faced with women and children who desperately need housing in order to avoid returning to the abuser.

In the past year we have helped 20 families with this kind of assistance.

A.3 If applicable, what steps or phases will be taken to complete the Activity (provision of services, engineering/design, advertising, bidding, contract award, construction, etc.)?

Esperanza will determine eligibility with regard to income. We intend to serve the neediest. (Very low income)

Bills and other documentation will be expected in writing and Esperanza will pay vendors directly.

A.4 Describe the population that the Activity will serve and how this population will be served. Describe the outreach and recruitment activities which will be conducted to make the proposed activity services known and accessible to the targeted population. *Please include* where these outreach and recruitment activities will take place.

Victims of domestic violence and their children, who are also residing in Santa Fe and are of very low income is the target population.

The clients are : 60% Hispanic; 26% Caucasian; 3% African American; 10% Native American; 1% Asian/other.

The majority of our clients are unemployed or underemployed; 99% are women.

The program will be made accessible to the clients by our counselors and advocates.

A.5 Estimate the number of total persons / households that will benefit from the CDBG funded portion of this Activity: (Fill in Households OR Persons depending on the type of Activity you are providing).

Total number of clients you anticipate serving:		
Households: 21	**OR**	Persons: 41

A.6 Use the following Table 1 to break out the number of persons you anticipate serving at the low (30-50% AMI) and very low-income (< 30% AMI) levels and the type of client (Refer to overview of CDBG program for the most recent income amounts). Along with income, please anticipate the number of clients that are severely disabled adults, homeless persons, abused children, battered spouses, and illiterate adults, persons with AIDS, migrant farm workers, *and elderly*. (All of these clients fall under the presumed benefit categories as defined by CDBG and therefore, all under low or extremely low income). This would apply mainly to Public Service or Public Facilities/Improvements Activities.

Extremely Low *Income* (<30% AMI)	Low Income (31-50%)	Moderate Income 51-80%	Illiterate adults	Abused children	Severely Disabled Persons	Migrant Farm Workers	Elderly	Persons with AIDS	Homeless Persons
41									

Table 1

A.7 Use the following Table 2 to breakout the number of households you <u>anticipate</u> serving at the income levels listed. (Refer to the 2016 AMI table on pg. 18 for the most recent income amounts). This would apply mainly to CDBG funding for housing projects such as Down Payment Assistance and Rehabilitation Activities.

Extremely Low Income (<30% AMI)	Low Income (31-50%)	Moderate Income (51-80%)	Non-low Moderate Income (81-100%)	Female Head of Household
21				21

Table 2

A.8 CDBG funded construction activities must be in compliance with local land use plans and zoning. Explain how the proposed activity conforms to local plans and zoning ordinances. Provide a copy of the page(s) of resource document(s), pertinent sections, and page(s). This only applies to projects where the CDBG funds will used for the actual construction, not acquisition.

N/A

A.9 Please describe the organization in terms of its administrative capacity and its qualifying experience and length of experience with activities or projects similar to the proposed Activity. Include purpose, goals, programs, activities, clients, and accomplishments, if any, in the area of activity for which funding is requested. Give examples of and list experience.

Esperanza has been providing DV services since 1976 in Santa Fe.

Our board of directors meets monthly and is active in many facets of the organization.

Our executive director has more than 20 years experieince in the field; our finance manager, a new addition to the team in 2016,

has extensive experience in his field and has been working to upgrade our policies, systems, and procedures.

We have been working with some form of a rental assistance program for more than a decade.

A.10 : Briefly describe your organizations experience in government contract administration, and knowledge of federal regulations governing acquisition, procurement, equal employment opportunity, and labor standards.

Esperanza receives funding from the state (CYFD), City, and a number of private foundations.

The HR director we hired in late 2015 has upgraded our policies and procedures and has extensive experience in

managing labor standards and equal employment opportunity regulations..

Our current finance manager also brings extensive experience to Esperanza as mentioned above.

B. National Objective Compliance

1. Benefits Low/ Moderate Income persons/households by:	
Area Benefit (eligible area) (LMA)	
Limited Clientele (LMC)	X
Housing Activities (LMH)	
Job Creation or Retention (LMJ)	

B.2 Is the service area city wide: (X) yes ( )no
If no, fill out B.3.

B.3 If an activity is based on an area benefit, identify the Census Tract(s) and Block Group(s) that will be served. Make sure to read the Overview for a clear understanding of the requirements of an area benefit. Attach a map of the area.

Census *Tract*	Block *Group*	Total *Population*	Low/Mod Income Population	% Low/ Mod Income
Total				

B.4 Explain fully how the proposed project meets the CDBG National Objective selected above. Provide substantiating documentation supporting the claims. Refer to Overview for more detail.

Clients must meet two basic eligibility requirements to receive assistance under the program. Esperanza's EAP meets the CDBG National Objective of benefiting low and very low income families within a limited clientele. In addition, all clients must be established as a client of Esperanza Shelter because of domestic violence. All clients will already be receiving services from Esperanza .

C. *Consolidated Plan Compliance*

The City of Santa Fe provides guidance in its 2013-2017 Consolidated Plan on funding uses, whether Federal, State, City, or Private. In accordance with federal regulations, each project must be consistent with the priorities outlined in the City's Consolidated Plan. (See Consolidated Plan on City website) Mark the **one priority** that the proposed project will meet.

P-25 Priority Needs

Check	Priority Need Name	Priority Level	Population Served	Goals Addressed
✓	[redacted]	High	Extremely low-income renters; people at risk of being homeless; persons with disabilities; homeless youth; veterans; elderly; families in transition; persons with HIV/AIDS and their families; public housing residents; mentally ill; chronic substance abusers; victims of domestic violence	Reduced rate of cost burden and corresponding drop in poverty rate for homeless households and those in danger of becoming homeless. *(Increase Opportunities for At Risk Populations);* Inventory of rental units and vouchers expanded to meet increased demand *(Increase Affordable Housing Opportunities)*
	Emergency Shelter (note could be classified as Public Service which is restricted in allocation amount)	High	Extremely low-income residents; chronic homeless; homeless youth; veterans; families in transition; mentally ill; chronic substance abusers; victims of domestic violence	Reduced rate of cost burden and corresponding drop in poverty rate for homeless households and those in danger of becoming homeless. *(Increase Opportunities for At Risk Populations)*
	Support Services for Homeless or People at Risk of Homelessness (note could be classified as Public Service which is restricted in allocation amount)	High	Extremely low-income renters; people at risk of being homeless; persons with disabilities; homeless youth; veterans; elderly; families in transition; persons with HIV/AIDS and their families; public housing residents; mentally ill; chronic substance abusers; victims of domestic violence	Reduced rate of cost burden and corresponding drop in poverty rate for homeless households and those in danger of becoming homeless. *(Increase Opportunities for At Risk Populations)*
	Refinancing Services and Support for Current Homeowners	High	Low-income homeowners; homeowners in risk of foreclosure; homeowners in substandard housing	Reduced rate of cost burden and corresponding drop in poverty rate for homeless households and those in danger of becoming homeless. *(Increase Opportunities for At Risk Populations);* Increased homeownership opportunities and support for long term affordability and accessibility for current homeowners. *(Increase Affordable Housing Opportunities)*

Priority Needs (cont.)

Check	Priority Need Name	Priority Level	Population Served	Goals Addressed
	Homeowner Rehabilitation Programs, Energy-efficiency Upgrades, Accessibility Retrofits	High	Low- and moderate-income homeowners; residents in redeveloping or transitioning neighborhoods; homeowners living in aging or substandard housing stock; seniors who need to "age in place;" people with disabilities	Increased homeownership opportunities and support for long term affordability and accessibility for current homeowners. *(Increase Affordable Housing Opportunities);* Housing opportunities reflect emerging needs, changing demographics and are aligned with redevelopment projects, economic development objectives and sustainability goals *(Address Emerging and Current Needs and Changing Demographics)*
	Construction of affordably-priced homes for homeownership	Low	Low- and moderate-income homebuyers and current renters; local workforce	Increased homeownership opportunities and support for long term affordability and accessibility for current homeowners. *(Increase Affordable Housing Opportunities)*
	Fair Housing Outreach	High	Low- and moderate-income renters; low-income landlords; persons with disabilities; Spanish speakers; large families; general public	Housing opportunities reflect emerging needs, changing demographics and are aligned with redevelopment projects, economic development objectives and sustainability goals *(Address Emerging and Current Needs and Changing Demographics)*
	Diversity of Housing Types	Low	Low- and moderate-income renters; seniors; small households; entrepreneurs; aging veterans; entrepreneurs and other self-employed	Housing opportunities reflect emerging needs, changing demographics and are aligned with redevelopment projects, economic development objectives and sustainability goals *(Address Emerging and Current Needs and Changing Demographics)*
	Non-Housing Community Facilities and Services	High	Low- and moderate-income residents; residents in redeveloping or transitioning neighborhoods; youth	Housing opportunities reflect emerging needs, changing demographics and are aligned with redevelopment projects, economic development objectives and sustainability goals *(Address Emerging and Current Needs and Changing Demographics)*

Priority Needs (cont.)

Check	Priority Need Name	Priority Level	Population Served	Goals Addressed
	Provision of Rental Units and Support Services for LI/ VLI Renters	High	Low- and very low-income renters; persons transitioning out of homelessness; renters in need of support services; public housing residents	Inventory of rental units and vouchers expanded to meet increased demand *(Increase Affordable Housing Opportunities);* Housing opportunities reflect emerging needs, changing demographics and are aligned with redevelopment projects, economic development objectives and sustainability goals *(Address Emerging and Current Needs and Changing Demographics)*
	Rental Rehabilitation	Low	Low- and moderate-income renters; low-income landlords; residents of low- income neighborhoods that are redeveloping or in transition; public housing residents	Inventory of rental units and vouchers expanded to meet increased demand *(Increase Affordable Housing Opportunities);* Housing opportunities reflect emerging needs, changing demographics and are aligned with redevelopment projects, economic development objectives and sustainability goals *(Address Emerging and Current Needs and Changing Demographics)*
	Down Payment Assistance	High	Low- and moderate-income residents who are "buyer ready"; first responders (fire, police, etc.)	Increased homeownership opportunities and support for long term affordability and accessibility for current homeowners. *(Increase Affordable Housing Opportunities)*
	Homebuyer Training & Counseling	High	Low- and moderate-income homebuyers; current renters	Increased homeownership opportunities and support for long term affordability and accessibility for current homeowners. *(Increase Affordable Housing Opportunities)*

D. Budget

D1. Describe the Proposed Budget for this Activity. Please explain all budgeted expenses *including contractual services, personnel services*, commodities, and capital outlay. Also explain what the CDBG funds will be used for. Also explain the effect of not receiving any or only a portion of a CDBG allocation has on the project budget.

All CDBG funds will be used to pay rent and utilities for DV clients.

Total budget= $32,500 We estimate that this will provide emergency housing for 60 days for 21 families. ($1400 x 21=$29,400).

The balance of $3,100 would be used to help families with utilities.

We currently have no other funding for this kind of emergency assistance.

D.2 Please complete the following table to identify the funding sources and amounts. Indicate total project cost that incorporates the total CDBG request and what funds or services, if any, the sponsor and/or other agencies will contribute. Also enter other ***committed*** funding sources (committed funds are funds available or will be available to fund the Activity during the CDBG Fiscal Year). Please be as accurate as possible. Should your organization be awarded funding, a revised budget (as needed) will become an Addendum to the CDBG Contract.

Type of funding	Source/ amount	Source/ amount	Source/ amount	Totals
Requested CDBG amount				$ 32,500
Other HUD funds i.e. HOME, Section 108				$
Other Federal Funds				$
City Funding i.e. Youth and Family, Human Services				$
State funding, i.e. MFA				$
Other i.e. in- kind, private funds				$

Total of all funding sources		**$** 32,500

D.3 If you are proposing to utilize CDBG funds to pay for staff costs, please list each position title and the percentage of their salary and benefits that will be funded by CDBG. Depending on the Activity, listing this information does not guarantee the position will be funded by CDBG as it may not be eligible.

PERSONNEL Position Title	**New (Y/N)**	**% salary & benefits paid for with CDBG**
N/A		

E. Performance Measurement System/Work Plan

CDBG/ Work Plan - FY 2017-2018

Provide the performance measurement goals, objectives and outcomes for your proposed CDBG project. Please refer to Exhibit B at the end of this document. Based on these measurements, attach a Work Plan that describes the goals, objectives and outcomes in greater detail and be:

(B) Specific
(C) Measurable
(D) Achievable
(E) Results-orientated
(F) Time bound

F. Submittal Requirements: Required Attachments

Please attach one (1) unbound copy of the following items <u>in the following order:</u>

✓ Transmittal Letter

✓ On your organization's letterhead, prepare a brief letter outlining the following:
- A brief summary of your proposed project;
- Funding amount requested; and
- Name, telephone number and address of a contact person(s)

✓ Board of Directors' Authorization to Request Funds

✓ Work Plan (as noted above)

✓ Certificate of Non-profit Incorporation

✓ IRS documentation showing qualification as a nonprofit corporation under Section 501(c) (3), and most recently submitted Federal Tax Return (Form 990 or 990EZ) or other financial statement.

✓ Organization Chart

✓ Copy of Agency's most Recent Independent Audit

✓ Agency's accounting and procurement policies

✓ Confidentiality and Disclosure of Information

✓ Addenda 1

✓ Addenda 2

CITY OF SANTA FE
COMMUNITY DEVELOPMENT BLOCK GRANT (CDBG)
PROPOSAL SCORE SHEET / Bid Number '17/22/RFP

Name of Applicant/Project: Interfaith Shelter (CDBG)

Amount Requested: $ 65K.

Evaluation Criteria	Weighted Value	Evaluation Points 1 thru 5	Total Score	Max Score
Activity to be funded • Why needed? Does it address a gap? • Steps/phases to complete the activity • Who is served? • #s proposed to be served	20	X 5	100	100
National Objective Compliance • Benefits low/moderate income persons/households? • Prevents slum/blight • Does the activity serve residents Citywide or a Low to Moderate Income (LMI) Area (i.e. Census Tract)?	20	X 5	100	100
Consolidated Plan Compliance • Does the application demonstrate that it meets Consolidated Plan priorities?	10	X 5	50	50
Budget • Is proposed budget realistic? • Are other funding sources secured?	10	X 5	50	50
Performance Measurement/Work Plan • Are performance measurements, outcomes and proposed outcomes well presented? Realistic? Well-supported in the application? • Does the applicant have the administrative capacity to carry out the activity to be funded?	20	X 4	80	100
		Total Points	380.	**400**

CDC Evaluator Name

Signature

02/14/17
Date

CITY OF SANTA FE (CSF)
NON-DISCLOSURE AND CONFLICT OF INTEREST STATEMENT

REQUEST FOR PROPOSAL #'17/22/P

EVALUATOR NAME: John A. Padilla.

CSF policy is to prevent personal or organizational conflict of interest, or the appearance of such conflict of interest, in the award and administration of CSF contracts and Purchase Orders.

I, John A. Padilla., the undersigned, hereby certify that the following statements are true and correct and that I understand and agree to be bound by commitments contained herein.

I am acting at the request of CSF as a participant in the evaluation of *offers/ proposals* received in response to the *Request for Offers/ Request for Proposals,* entitled and/ or numbered
I am acting of my own accord and not acting under duress. I am not currently employed by, nor am I receiving any compensation from, nor have I been the recipient of any present or future economic opportunity, employment, gift, loan, gratuity, special discount, trip, favor, or service in connection with any *offer/ proposal* or involved *Offeror/Proposer* in return for favorable consideration. I have no preconceived position on the relative merits of any of the *offers/ proposals* nor have I established a personal preference or position on the worth or standing of any *Offeror/ Proposer* participating in this action. CSF policy is to prevent personal or organizational conflict of interest, or the appearance of such conflict of interest, in the award and *administration of CSF contracts, including, but not limited to contracts* for professional services, agreements with consultants and Purchase Orders.

I hereby certify that to the best of my knowledge and belief, no conflict of interest exists that may diminish my capacity to perform an impartial, technically sound, objective review of this proposal(s) or otherwise result in a biased opinion or unfair competitive advantage.
I agree not to disclose or otherwise divulge any information pertaining to the contents, status, or ranking of any *offer/ proposal* to anyone other than the team leader or other evaluation team members. I understand the terms and "disclose or otherwise divulge" to include, but are not limited to, reproduction of any part or any portion of any *offer/ proposal,* or removal of same from designated areas without prior authorization from the evaluation team leader. I agree to perform any and all evaluations of said *offers/ proposals* in an unbiased manner, to the best of my ability, and with the best interest of CSF paramount in all decisions.
I agree to return to CSF Purchasing Department all copies of proposals, as well as any abstracts, upon completion of the evaluation.

02/14/17

SIGNATURE AND DATE:

Cover Page

City of Santa Fe Community Development Block Grant Program FY 2017-2018	
Name of Nonprofit Organization:	Interfaith Community Shelter Santa Fe
Name of Executive Director:	Joe Jordan-Berenis
Name of Board President:	Annie-Laurie Coogan
Name, Contact Information (Address, Phone, and Email) of Person Submitting Request (Fiscal Agent if appropriate):	Lisa Vakharia,2801Cerrillos Rd. Santa Fe, NM 505-795-7494 Joe Jordan-Berenis 505-603-8756 joe@interfaithsheltersf.org vakharialisa@gmail.com
Amount Requested:	$65,000
Program Name or Service being requested for Funding:	Interfaith Community Shelter's Women's Summer Safe Haven
Brief Program or Service Description:	Women's Summer Safe Haven (WSSH) during the months the seasonal night shelter is closed is to provide women with a safe place to be as an alternative to camping alone or partnering with a man for protection.
Check which Category Describes your organization: 8. Private Non-Profit 9. For Profit 10. Public Agency 11. Government Agency	Private non-profit
DUNS or CAGE #	037575262
Business Registration #	16-00045983
Tax ID #	27-0736366
State CRS #	03194010-002
Check One:	☐ Previous Recipient ☒ New Applicant
Funding Categories to be Addressed (Circle one):	☐ Housing ☐ Public Facility ☑ *Public Service*

Project Proposal Summary
(If funded, the following will be written into the contract Scope of Services with Accomplishment Levels along with details provided in Section A)

Activity Name	Interfaith Community Shelter Women's Summer Safe Haven
Brief Summary of the activity	Women's Summer Safe Haven is to keep women safe during the time when our seasonal shelter is closed.
Provides safety, security, offers community, socialization, reduction of stress and anxiety.	
The Women's Summer Safe Haven will serve 20-30 women per night May-October.	

Amount of CDBG funding requested for Activity	$65,000
Total budget of Activity	$175,145

To the best of my knowledge and belief, all data in this application is true and correct. If funded, I certify that the Applicant Organization is willing and able to adhere to the polices and procedures specified by the City of Santa Fe and all applicable program regulations of the US Department of Housing and Urban Development. Further, I understand there is not an agreement until the City of Santa Fe and the individual authorized to execute contracts on behalf of the Applicant Organization has signed the contract.

Authorized Signature *(sign in **blue** ink)*	Executive Direcector Title	1/27/17 Date

CDBG funds can be used for specific Eligible Activities as outlined in the Overview. Select one type of Eligible Activity category that best describes your Project.

Type of Eligible Activity (check one)

Activities Related to Housing	
Other Real Property Activities	
Public Facilities/Improvements	
Public Service	X

Section A: Activity to be funded

A1. Briefly describe the Activity you are requesting to fund with CDBG. This will help determine eligibility.

See attachment

A2. Why is this Activity needed? Does it address a gap? Describe the degree of need, or the severity of a problem including cause, extent, location, frequency and duration that will be addressed by the project. Provide a description of service gaps the activity fills in the community. Additionally, supply data, such as demographics, reports and/or other information supporting your information and proving the need exists. **(Attach additional pages, if necessary)**

See attachment

A.3 If applicable, what steps or phases will be taken to complete the Activity (provision of services, engineering/design, advertising, bidding, contract award, construction, etc.)?

See attachment

A.4 Describe the population that the Activity will serve and how this population will be served. Describe the outreach and recruitment activities which will be conducted to make the proposed activity services known and accessible to the targeted population. Please include where these outreach and recruitment activities will take place.

See attachment

A.5 Estimate the number of total persons / households that will benefit from the CDBG funded portion of this Activity: (Fill in Households OR Persons depending on the type of Activity you are providing).

Total number of clients you anticipate serving:		
Households:	OR	Persons: 3200

A.6 Use the following Table 1 to break out the number of persons you anticipate serving at the low (30-50% AMI) and very low-income (< 30% AMI) levels and the type of client (Refer to overview of CDBG program for the most recent income amounts). Along with income, please anticipate the number of clients that are severely disabled adults, homeless persons, abused children, battered spouses, and illiterate adults, persons with AIDS, migrant farm workers, and elderly. (All of these clients fall under the presumed benefit categories as defined by CDBG and therefore, all under low or extremely low income). This would apply mainly to Public Service or Public Facilities/Improvements Activities.

Extremely Low Income (<30% AMI)	Low Income (31-50%)	Moderate Income 51-80%	Illiterate adults	Abused children	Severely Disabled Persons	Migrant Farm Workers	Elderly	Persons with AIDS	Homeless Persons
3200									

Table 1

A.7 Use the following Table 2 to breakout the number of households you anticipate serving at the income levels listed. (Refer to the 2016 AMI table on pg. 18 for the most recent income amounts). This would apply mainly to CDBG funding for housing projects such as Down Payment Assistance and Rehabilitation Activities.

Extremely Low Income (<30% AMI)	Low Income (31-50%)	Moderate Income (51-80%)	Non-low Moderate Income (81-100%)	Female Head of Household
N/A				

Table 2

A.8 CDBG funded construction activities must be in compliance with local land use plans and zoning. Explain how the proposed activity conforms to local plans and zoning ordinances. Provide a copy of the page(s) of resource document(s), pertinent sections, and page(s). This only applies to projects where the CDBG funds will used for the actual construction, not acquisition.

N/A

A.9 Please describe the organization in terms of its administrative capacity and its qualifying experience and length of experience with activities or projects similar to the proposed Activity. *Include purpose, goals, programs, activities,* clients, and accomplishments, if any, in the area of activity for which funding is requested. Give examples of and list experience.

See attachment

A.10 : Briefly describe your organizations experience in government contract administration, and knowledge of federal regulations governing acquisition, procurement, equal employment opportunity, and labor standards.

See attachement

B. National Objective Compliance

1. Benefits Low/ Moderate Income persons/households by:	3,200
Area Benefit (eligible area) (LMA)	
Limited Clientele (LMC)	
Housing Activities (LMH)	
Job Creation or Retention (LMJ)	

B.2 Is the service area city wide: (X) yes ( )no
If no, fill out B.3.

B.3 If an activity is based on an area benefit, identify the Census Tract(s) and Block Group(s) that will be served. Make sure to read the Overview for a clear understanding of the requirements of an area benefit. Attach a map of the area.

Census Tract	Block Group	Total Population	Low/Mod Income Population	% Low/ Mod Income
Total				

B.4 Explain fully how the proposed project meets the CDBG National Objective selected above. Provide substantiating documentation supporting the claims. Refer to Overview for more detail.

See attachment

C. Consolidated Plan Compliance

The City of Santa Fe provides guidance in its 2013-2017 Consolidated Plan on funding uses, whether Federal, State, City, or Private. In accordance with federal regulations, each project must be consistent with the priorities outlined in the City's Consolidated Plan. (See Consolidated Plan on City website) Mark the **one priority** that the proposed project will meet.

P-25 Priority Needs

Check	Priority Need Name	Priority Level	Population Served	Goals Addressed
	Rental Vouchers	High	Extremely low-income renters; people at risk of being homeless; persons with disabilities; homeless youth; veterans; elderly; families in transition; persons with HIV/AIDS and their families; public housing residents; mentally ill; chronic substance abusers; victims of domestic violence	Reduced rate of cost burden and corresponding drop in poverty rate for homeless households and those in danger of becoming homeless. *(Increase Opportunities for At Risk Populations);* Inventory of rental units and vouchers expanded to meet increased demand *(Increase Affordable Housing Opportunities)*
	Emergency Shelter (note could be classified as Public Service which is restricted in allocation amount)	High	Extremely low-income residents; chronic homeless; homeless youth; veterans; families in transition; mentally ill; chronic substance abusers; victims of domestic violence	Reduced rate of cost burden and corresponding drop in poverty rate for homeless households and those in danger of becoming homeless. *(Increase Opportunities for At Risk Populations)*
X	Support Services for Homeless or People at Risk of Homelessness (note could be classified as Public Service which is restricted in allocation amount)	High	Extremely low-income renters; people at risk of being homeless; persons with disabilities; homeless youth; veterans; elderly; families in transition; persons with HIV/AIDS and their families; public housing residents; mentally ill; chronic substance abusers; victims of domestic violence	Reduced rate of cost burden and corresponding drop in poverty rate for homeless households and those in danger of becoming homeless. *(Increase Opportunities for At Risk Populations)*
	Refinancing Services and Support for Current Homeowners	High	Low-income homeowners; homeowners in risk of foreclosure; homeowners in substandard housing	Reduced rate of cost burden and corresponding drop in poverty rate for homeless households and those in danger of becoming homeless. *(Increase Opportunities for At Risk Populations);* Increased homeownership opportunities and support for long term affordability and accessibility for current homeowners. *(Increase Affordable Housing Opportunities)*

Priority Needs (cont.)

Check	Priority Need Name	Priority Level	Population Served	Goals Addressed
	Homeowner Rehabilitation Programs, Energy-efficiency Upgrades, Accessibility Retrofits	High	Low- and moderate-income homeowners; residents in redeveloping or transitioning neighborhoods; homeowners living in aging or substandard housing stock; seniors who need to "age in place;" people with disabilities	Increased homeownership opportunities and support for long term affordability and accessibility for current homeowners. *(Increase Affordable Housing Opportunities);* Housing opportunities reflect emerging needs, changing demographics and are aligned with redevelopment projects, economic development objectives and sustainability goals *(Address Emerging and Current Needs and Changing Demographics)*
	Construction of affordably-priced homes for homeownership	Low	Low- and moderate-income homebuyers and current renters; local workforce	Increased homeownership opportunities and support for long term affordability and accessibility for current homeowners. *(Increase Affordable Housing Opportunities)*
	Fair Housing Outreach	High	Low- and moderate-income renters; low-income landlords; persons with disabilities; Spanish speakers; large families; general public	Housing opportunities reflect emerging needs, changing demographics and are aligned with redevelopment projects, economic development objectives and sustainability goals *(Address Emerging and Current Needs and Changing Demographics)*
	Diversity of Housing Types	Low	Low- and moderate-income renters; seniors; small households; entrepreneurs; aging veterans; entrepreneurs and other self-employed	Housing opportunities reflect emerging needs, changing demographics and are aligned with redevelopment projects, economic development objectives and sustainability goals *(Address Emerging and Current Needs and Changing Demographics)*
	Non-Housing Community Facilities and Services	High	Low- and moderate-income residents; residents in redeveloping or transitioning neighborhoods; youth	Housing opportunities reflect emerging needs, changing demographics and are aligned with redevelopment projects, economic development objectives and sustainability goals *(Address Emerging and Current Needs and Changing Demographics)*

Priority Needs (cont.)

Check	Priority Need Name	Priority Level	Population Served	*Goals Addressed*
	Provision of Rental Units and Support Services for LI/ VLI Renters	High	Low- and very low-income renters; persons transitioning out of homelessness; renters in need of support services; public housing residents	Inventory of rental units and vouchers expanded to meet increased demand *(Increase Affordable Housing Opportunities);* Housing opportunities reflect emerging needs, changing demographics and are aligned with redevelopment projects, economic development objectives and sustainability goals *(Address Emerging and Current Needs and Changing Demographics)*
	Rental Rehabilitation	Low	Low- and moderate-income renters; low-income landlords; residents of low- income neighborhoods that are redeveloping or in transition; public housing residents	Inventory of rental units and vouchers expanded to meet increased demand *(Increase Affordable Housing Opportunities);* Housing opportunities reflect emerging needs, changing demographics and are aligned with redevelopment projects, economic development objectives and sustainability goals *(Address Emerging and Current Needs and Changing Demographics)*
	Down Payment Assistance	High	Low- and moderate-income residents who are "buyer ready"; first responders (fire, police, etc.)	Increased homeownership opportunities and support for long term affordability and accessibility for current homeowners. *(Increase Affordable Housing Opportunities)*
	Homebuyer Training & Counseling	High	Low- and moderate-income homebuyers; current renters	Increased homeownership opportunities and support for long term affordability and accessibility for current homeowners. *(Increase Affordable Housing Opportunities)*

D. Budget

D1. Describe the Proposed Budget for this Activity. Please explain all budgeted expenses including contractual services, personnel services, commodities, and capital outlay. Also explain what the CDBG funds will be used for. Also explain the effect of not receiving any or only a portion of a CDBG allocation has on the project budget.

The proposed budget includes $10,000 for the following items: food, meal supplies, and restroom/cleaning supplies

$55,000 in the budget includes the personnel costs for the Night staff.

D.2 Please complete the following table to identify the funding sources and amounts. Indicate total project cost that incorporates the total CDBG request and what funds or services, if any, the sponsor and/or other agencies will contribute. Also enter other ***committed*** funding sources (committed funds are funds available or will be available to fund the Activity during the CDBG Fiscal Year). Please be as accurate as possible. Should your organization be awarded funding, a revised budget (as needed) will become an Addendum to the CDBG Contract.

Type of funding	Source/ amount	Source/ amount	Source/ amount	Totals
Requested CDBG amount				$ 65,000
Other HUD funds i.e. HOME, Section 108	MFA/HUD	MFA/HUD	MFA/HUD	$ 54,775
Other Federal Funds	FEMA	FEMA	FEMA	$ 14,667
City Funding i.e. Youth and Family, Human Services	Y&F	Y&F	Y&F	$ 200,000
State funding, i.e. MFA				$
Other i.e. in- kind, private funds	Donations	Donations	Donations	$ 169,075

Total of all funding sources	Donations and Grants	**$** 503,517

D.3 If you are proposing to utilize CDBG funds to pay for staff costs, please list *each position title and the percentage of their salary and benefits that will be* funded by CDBG. Depending on the Activity, listing this information does not guarantee the position will be funded by CDBG as it may not be eligible.

PERSONNEL Position Title	**New (Y/N)**	**% salary & benefits paid for with CDBG**
Night Staff	N	50%

E. Performance Measurement System/Work Plan

CDBG/ Work Plan - FY 2017-2018

Provide the performance measurement goals, objectives and outcomes for your proposed CDBG project. Please refer to Exhibit B at the end of this document. Based on these measurements, attach a Work Plan that describes the goals, objectives and outcomes in greater detail and be:

(B) Specific
(C) Measurable
(D) Achievable
(E) Results-orientated
(F) Time bound

F. Submittal Requirements: Required Attachments

Please attach one (1) unbound copy of the following items <u>in the following order:</u>

X Transmittal Letter

X On your organization's letterhead, prepare a brief letter outlining the following:

- A brief summary of your proposed project;
- Funding amount requested; and
- Name, telephone number and address of a contact person(s)

X Board of Directors' Authorization to Request Funds

X *Work Plan (as noted above)*

X Certificate of Non-profit Incorporation

X IRS documentation showing qualification as a nonprofit corporation under Section 501(c) (3), and most recently submitted Federal Tax Return (Form 990 or 990EZ) or other financial statement.

X Organization Chart

X Copy of Agency's most Recent Independent Audit

X Agency's accounting and procurement policies

X Confidentiality and Disclosure of Information

Section A: Activity to be funded

A1.

The Interfaith Community Shelter (ICS) is largely a volunteer agency consisting of 40+ faith and community groups with more than 2000 volunteers. ICS's mission is to provide safe, hospitable shelter, food and clothing to men women and children experiencing homelessness in the city of Santa Fe, to promote self-reliance by providing a point of entry to other services necessary to make the transition from homelessness to stable housing. The primary reason ICS's seasonal night shelter came into existence was to prevent death due to hypothermia. In similar vein, the reason ICS has now decided to keep the shelter open as a Women's Summer Safe Haven (WSSH) during the months the seasonal night shelter is closed is to provide women with a safe place to be as an alternative to camping alone or partnering with a man for protection. In both these scenarios, the women served by the Interfaith Community Shelter are frequently at -risk of manipulation (providing sexual favors and/or violence). Toward the end of the summer of 2015, two women, who were guests in the seasonal night shelter, were beaten by their partners, another who was a victim of domestic violence, died of an overdose in a motel room, and the death of another woman at a homeless campsite within the city has yet to be determined to be accidental or homicidal death. In response, last year the Board of Directors fund raised additional monies necessary to keep the shelter open during the summer months for women and children experiencing homelessness in Santa Fe. The WSSH opens on the evening of the first Saturday in May, the day the seasonal night shelter closes, and remains open until mid-October, when the seasonal night shelter re-opens for any man, woman and/child who is experiencing homelessness. The Women's Safe Haven Summer project fully meets the CDBB National Objective 1). Benefit to low and moderate income (LMI) persons or households and Objective 3). Address and urgent community need that threatens the health and welfare of residents.

A2.

The need for the Women's Summer Safe Haven is to keep women safe during the time when our seasonal shelter is closed. There is a gap in services and our WWSH will fill the gap in the city of Santa Fe and help protect our women. Based on first year's statistics, ICS expects to serve 20-30 women per night in the Women's Summer Safe Haven. Beyond safety and security, the WSSH offers opportunity for community, socialization, reduction of stress and anxiety. It creates a sense of normalcy and continuity in addition to shelter, food and full access to the array of services provided by ICS's fourteen Partner Providers in the Day Services Program. Last year, ICS served 1,263 discrete individuals for 19,101 bed nights, including 308 women. Most of the women served are between 45-65 years of age, with chronic long standing mental/behavioral health issues. ICS is the only "come as you are" or "minimal barrier" shelter in Northern New Mexico, which means ICS accepts everyone, including those who are inebriated, and their pets. The only criterion for entry into the Women's Safe Haven Summer Program is the guest is willingness to abide by the rules. The Summer Safe Haven will be open from May-October and will be open from 4-7 pm. There will be a day staff person to assist women remaining on the property once the partner providers have left for the day. An evening Program Manager is on duty from 7 pm to 10 pm to supervise, assist and support the night staff with registering guests. Two night staff, one female and one female, feed, register and support the women in the program from 7:30 pm until 7:30 am the following morning. Women enter the program anytime between 7:30 pm and 10 pm, and are discharged at 7:30 am the following morning. The Executive Director is responsible is for the daily operation of all of ICS's

programming, the implementation of plans and policies established by the Board, the active engagement. Last year, ICS's population demographics were as follows: 40% Hispanics, 31% White/Anglo; 14% Native America; 3% African American; 1% Asian, and 11% Other. The largest challenge to New Mexico and Santa Fe community is the number of individuals and families living in poverty: More than 20% of the residents of New Mexico and 17.3% of Santa Fe's population of 70,297. The city of Santa Fe estimates that there are more than 1,000 homeless students in the Santa Fe Public School system. In recently released report by the US Department of Housing and Urban Development *(HUD), New Mexico had the fifth largest increase of homeless veterans in the United States, 30.9%.* The last HUD Point in time survey 1,171 increase of homeless individuals as follows: 619 in shelters, 408 in transitional housing and 144 sleeping outside or in a place not meant for human habitation. The survey does not count those individuals in motels, "doubling-up" or "couch surfing". But by far the most reliable metric is the number of chronically homeless individuals served last by ICS; 1,263 discrete individuals for 19,101 bed nights. As stated above, the majority of women served by ICS's having chronic mental/behavioral health issues that prevent them from gaining entry into the other programs sheltering women in Santa Fe. This is consistent with "The Services Paradox and Assumed Functionality" of the social services system where the individuals most in need of help are the lease likely to be offered help due to artificial barriers created by the service system, i.e., those offered services must be clean and present reasonably well; sober and/or substance free; capable of attending group and/or therapy on a regularly scheduled basis; employable; in possession of legal documentation (like a child's birth certificate), etc. Last year, ICS served 308 women. The majority ranged in age from 45-65 years old. Most were incapable of complying with the rules and requirements necessary to access services, even those services specifically designed for individuals who are homeless and/or dealing with a mental health and /or substance issue. Keeping the shelter open year-round as a Women's Summer Safe Haven, so these women can be off the street and in a safe and sheltered environment was the next step in the continuing evolution of the Interfaith Community Shelter.

A3.

Staffing for the Women's Summer Safe Haven will consists of a day staff person form 4-7 pm, to assist the women remaining on the property once the partner providers have left for the day. An evening Program Manager in on duty from 7 pm to 10 pm to supervise, assist and support the night staff with registering guests. Two night staff, one female and one make, feed, register and support the women in the program from 7:30 pm until 7:30 am the following am the following morning. The Executive Director is responsible for the daily operation of all of ICS's programming, implementation of plans and policies established by the Board of Directors, active engagement of volunteers, a liaison to partner providers and the community, and represents the interest of the ICS's consumer on a local state and *national level. In ICS's strategic plan of the organization it is a goal* to enhance the volunteer program and increase hosts and the core teams. ICS will need to enhance training and consistency along with support of our faith leaders in Santa Fe. Many of our outreach and recruitment activities will happen throughout the faith communities and our supporting partners.

A4.

The population that will be served are women in the Summer Safe Haven Program. It will serve between 20-30 women per night with approximately 3200 women total over the summer. Along with safety, security and a sense of normalcy and continuity in addition to food, clothing, shelter and access to our Partnership Programs. ICS has fourteen Partnership Providers that will continue to educate our providers and our community on our services. 40+ faith and community groups currently help serve and volunteer to make the Interfaith Community Shelter run on a daily basis. Our Board of Directors is committed to recruitment of new groups and making sure we retain the current groups to make our organization run.

A9.

The Interfaith Community Shelter is dedicated to those least able to help themselves by offering culturally sensitive, comprehensive services to all who are experiencing homelessness in the city of Santa Fe. As stated above, ICS is the only shelter in Northern New Mexico to accept everyone, regardless of condition or circumstances. In addition, ICS operates in accordance with the US Department of Health and Human Services (USD HHS) strategic plan entitled "Ending Chronic Homelessness; Strategies for Action." The general premise of the plan is that homelessness is a complex social problem and ending homelessness requires collaboration between various providers of homeless services. ICS operates Resource Days every Tuesday, Wednesday, and Friday, year round. By creating a "one-stop shop", ICS has created a delivery system that affords those who are homeless the best possible opportunity to seamlessly access services they need to make the transition to stable housing. ICS's Partner Providers include, but are not limited to: The Veterans Administration (housing and case management), Healthcare for the Homeless (health/dental care and Medicaid enrollment), Life Link (mental health/substance abuse counseling and /or long-tern housing), Santa Fe Community Services (harm reduction and acu-detox), ST. Elizabeth's (state-id's), The Food Depot (SNAP) Congressman Ben Ray Lujan's Constituent Liaison (assistance with federal benefits), Goodwill Industries (employment assistance), Southwest Care (HIV/AIDS, Hep-C testing), Santo Domingo Pueblo Traditional Support Worker/Spiritual Leader (counseling for pueblo residents so they can return home), Street Homeless Animal Project (pet care), Youth Shelter's Street Outreach Program (serving the needs of the guests 18-22), Legal Aid and Homeless Court. In addition ICS provides free lunch, clothing, showers, haircuts, and art group, and case management. Last year, ICS served 56,460 meals and distributed 36,320 items of clothing. 2000 volunteers are helping the only 3 paid staff members making ICS and the Women's Safe Haven Summer Program operate.

A10.

The Interfaith Community Shelter has a current working knowledge of government contracts on the local, state, and federal level. We currently manage several governmental contacts and are in good standing. The Interfaith Community Shelter abides by all procurement, equal employment, and labor laws.

B4.

The Women's Safe Haven Summer project fully meets the CDBB National Objective 1). Benefit to low and moderate income (LMI) persons or households and Objective 3). Address and urgent community *need that threatens the health and welfare of residents. The Interfaith Community Shelter (ICS)* is largely a volunteer agency consisting of 40+ faith and community groups with more than 2000 volunteers. ICS's mission is to provide safe, hospitable shelter, food and clothing to men women and children experiencing homelessness in the city of Santa Fe, to promote self-reliance by providing a point of entry to other services necessary to make the transition from homelessness to stable housing. The primary reason ICS's seasonal night shelter came into existence was to prevent death due to hypothermia. In similar vein, the reason ICS has now decided to keep the shelter open as a Women's Summer Safe Haven (WSSH) during the months the seasonal night shelter is closed is to provide women with a safe place to be as an alternative to camping alone or partnering with a man for protection. In both these scenarios, the women served by the Interfaith Community Shelter are frequently at -risk of manipulation (providing sexual favors and/or violence). The WSSH opens on the evening of the first Saturday in May, the day the seasonal night shelter closes, and remains open until mid-October, when the seasonal night shelter re-opens for any man, woman and/*child who is experiencing homelessness.* The population that will be served are women in the Summer Safe Haven Program. It will serve between 20-30 women per night along with safety, security and a sense of normalcy and continuity in addition to food, clothing, shelter and access to our Partnership Programs. ICS has fourteen Partnership Providers that will continue to educate our providers and our community on our services. Last year, ICS served 1,263 discrete individuals for 19,101 bed nights, including 308 women. Most of the women served are between 45-65 years of age, with chronic long standing mental/behavioral health issues. ICS is the only "come as you are" or "minimal barrier" shelter in Northern New Mexico, which means ICS accepts everyone, including those who are inebriated, and their pets. The only criterion for entry into the Women's Safe Haven Summer Program is the guest is willingness to abide by the rules. The Women's Safe Have Summer Project meets the CDBG National Objectives by: 1). Provides a service gap in the Santa Fe community for women, 2). benefiting our residents who are low and moderate income (LMI) persons or households and 3). address and urgent community need that threatens the health or welfare of residents. It is imperative that we provide this project to protect our women's safety and wellness. The violence and domestic violence could have been prevented if these services were provided in our community. The Summer Safe Haven Program can provide safety and fill the gap.

E. Performance Measurement System /Work Plan

(B). Specific Providing homeless women a safe place to go May-October

(C). Measurable 20-30 women per night

(D). Achievable Goal based on first years number.

(E). Results Successful program is providing homeless women with safety in our community while also addressing anxiety, reduction of stress, providing a sense of normalcy, a place of community, food and shelter.

(F). Time Bound Open May-October when our shelter closes for season to women/children.

Exhibit B. Work Plan Explanation

Objectives-

1. **Create Suitable Living Environments (SL)-** relates to activities that are designed to benefit communities, families, or individuals by addressing issues in their living environment. This objective relates to activities that are intended to address a wide range of issues faced by low- and moderate-income persons, from physical problems with their environment, such as poor quality infrastructure, to social issues such as crime prevention, literacy, or elderly health services.

What is the purpose of the activity?

What is the larger community need that I am seeking to address?

The purpose and goal is to provide women and children experiencing homelessness in the City of Santa Fe a safe haven during the months the seasonal night shelter is closed, as a safe alternative to camping alone or partnering up with a man for protection. To provide services to women and children with a full array of our fourteen provider Day Services Program.

The larger community need that I am seeking to address is homelessness of women and children along with safety, domestic violence and preventing further violent crime to women.

The Interfaith Community Shelter will be providing these individuals with safety, hospitable shelter, food, and clothing.

Outcomes-

1. **Availability/accessibility-** applies to activities that make services, infrastructure, public, services, public facilities, housing, or shelter available or accessible to low-and moderate-income (LMI) people, including persons with disabilities. In this category, accessibility does not refer only to physical barriers, but also to making the basics of daily living available and accessible to LMI people where they live.

What type of change or result am I seeking?

What is the expected result of my activity?

The Expected result we are seeking for the Summer Safe Haven Program is that the women and children will be provided with shelter, safety, and security as well as being offered the opportunity for community, socialization, reduction of stress and anxiety, a sense of normalcy and continuity, and the provision of services necessary to stabilize their lives and make the transition from homelessness to permanent housing.

All of the women served will be registered in the Interfaith Community database. The program expects to serve 20-30 women per night for approximately 3200 bed nights of service. Funding by CDBG is approximately 43% of the total operating cost of the Women's Summer Safe Haven Program. The number of women referred to ICS's Day Services Program Partner Providers will be kept as well as the number housed and /or placed in Continuum Care.

Indicators-

Common Indicators that indicate that all sub recipients are required to report are:

- Activity of money leveraged from other Federal, state, local, and private sources per activity
- Number of persons by households, businesses, units or beds assisted, as appropriate
- Income levels of persons by households by <30%, 30-49%, 50-79% and ≥80% of area median income (AMI)
- Race, ethnicity and disability data when programs directly benefit persons or households

****Public Services**

1. Federal Grants: FEMA (Emergency Homeless Assistance)
   State Grants:
   Local Grants: City of Santa Fe Youth and Family Division,
   Private Sources: Daniels Fund, Christus, Catholic Foundation, Poverty & Outreach of Episcopal Dioceses and Individual donations
2. 3,200 approximate Women will partake in the Women Safe Haven Program
3. This is a city wide project, but serves the Extremely Low Income ≤30% AMI
4. ICS's population last year was 40% Hispanic; 31% White/Anglo; 14% Native American; 3% African American; 1% Asian; and 11% Other

CITY OF SANTA FE
COMMUNITY DEVELOPMENT BLOCK GRANT (CDBG)
PROPOSAL SCORE SHEET / Bid Number '17/22/RFP

Name of Applicant/Project: Youth Shelters (CDBG)

Amount Requested: $ 20,551.00

Evaluation Criteria	Weighted Value	Evaluation Points 1 thru 5	Total Score	Max Score
Activity to be funded • Why needed? Does it address a gap? • Steps/phases to complete the activity • Who is served? • #s proposed to be served	20	X 5	100	100
National Objective Compliance • Benefits low/moderate income persons/households? • Prevents slum/blight • Does the activity serve residents Citywide or a Low to Moderate Income (LMI) Area (i.e. Census Tract)?	20	X 5	100	100
Consolidated Plan Compliance • Does the application demonstrate that it meets Consolidated Plan priorities?	10	X 5	50	50
Budget • Is proposed budget realistic? • Are other funding sources secured?	10	X 4	40	50
Performance Measurement/Work Plan • Are performance measurements, outcomes and proposed outcomes well presented? Realistic? Well-supported in the application? • Does the applicant have the administrative capacity to carry out the activity to be funded?	20	X 5	100	100
		Total Points	390.	400

CDC Evaluator Name Signature Date 02/14/17

CITY OF SANTA FE (CSF)
NON-DISCLOSURE AND CONFLICT OF INTEREST STATEMENT

REQUEST FOR PROPOSAL #'17/22/P

EVALUATOR NAME: John A. Padilla.

CSF policy is to prevent personal or organizational conflict of interest, or the appearance of such conflict of interest, in the award and administration of CSF contracts and Purchase Orders.

I, John A. Padilla., the undersigned, hereby certify that the following statements are true and correct and that I understand and agree to be bound by commitments contained herein.

I am acting at the request of CSF as a participant in the evaluation of *offers/ proposals* received in response to the *Request for Offers/ Request for Proposals,* entitled and/ or numbered I am acting of my own accord and not acting under duress. I am not currently employed by, nor am I receiving any compensation from, nor have I been the recipient of any present or future economic opportunity, employment, gift, loan, gratuity, special discount, trip, favor, or service in connection with any *offer/ proposal* or involved *Offeror/Proposer* in return for favorable consideration. I have no preconceived position on the relative merits of any of the *offers/ proposals* nor have I established a personal preference or position on the worth or standing of any *Offeror/ Proposer* participating in this action. CSF policy is to prevent personal or organizational conflict of interest, or the appearance of such conflict of interest, in the award and administration of CSF contracts, including, but not limited to contracts for professional services, agreements with consultants and Purchase Orders.

I hereby certify that to the best of my knowledge and belief, no conflict of interest exists that may diminish my capacity to perform an impartial, technically sound, objective review of this proposal(s) or otherwise result in a biased opinion or unfair competitive advantage.
I agree not to disclose or otherwise divulge any information pertaining to the contents, status, or ranking of any *offer/ proposal* to anyone other than the team leader or other evaluation team members. I understand the terms and "disclose or otherwise divulge" to include, but are not limited to, reproduction of any part or any portion of any *offer/ proposal,* or removal of same from designated areas without prior authorization from the *evaluation team leader. I agree* to perform any and all evaluations of said *offers/ proposals* in an unbiased manner, to the best of my ability, and with the best interest of CSF paramount in all decisions.
I agree to return to CSF Purchasing Department all copies of proposals, as well as any abstracts, upon completion of the evaluation.

02/14/17

SIGNATURE AND DATE:

Cover Page

City of Santa Fe Community Development Block Grant Program FY 2017-2018	
Name of Nonprofit Organization:	Youth Shelters and Family Services
Name of Executive Director:	David Block
Name of Board President:	Donna Bailey
Name, Contact Information (Address, Phone, and Email) of Submitting Request (Fiscal Agent if appropriate):	David Block, Executive Director, Youth Shelters and Family Services, P.O. Box 28279, Santa Fe, NM 87592-8279; 505-983-0586; dblock@youthshelters.org Person
Amount Requested:	$20,551
Program Name or Service being Requested for funding:	Street Outreach Program
Brief Program or Service Description: CDBG funding will make it possible for us to serve more homeless youth through our Street Outreach Program. This will allow a larger number of young people to receive the services they need to leave the streets and achieve safety and stability.	
Check which Category Describes your organization: 8. ✓ Private Non-Profit 9. For Profit 10. Public Agency 11. Government Agency	
DUNS or CAGE #	795320761
Business Registration #	17-00038708
Tax ID #	85-0324625
State CRS #	02010414006
Check One:	☑ Previous Recipient ☐ New Applicant
Funding Categories to be Addressed (Circle one): ☐ Housing ☐ Public Facility ☑ Public Service	

Project Proposal Summary
(If funded, the following will be written into the contract Scope of Services with Accomplishment Levels along with details provided in Section A)

Activity Name	Street Outreach Program
Brief Summary of the activity	We will serve at least 625 homeless, runaway and in-crisis youth through our Street Outreach Program this coming year, an increase of 25 young people (minimum). This will be accomplished with the same staffing and funding level as our current CDBG grant. The demand for our services has been far greater than expected, and it is imperative that we are able to assist the additional youth seeking help.

Amount of CDBG funding requested for Activity	$20,551
Total budget of Activity	$186,000

To the best of my knowledge and belief, all data in this application is true and correct. If funded, I certify that the Applicant Organization is willing and able to adhere to the polices and procedures specified by the City of Santa Fe and all applicable program regulations of the US Department of Housing and Urban Development. Further, I understand there is not an agreement until the City of Santa Fe and the individual authorized to execute contracts on behalf of the Applicant Organization has signed the contract.

Authorized Signature *(sign in **blue ink**)*	Executive Director Title	January 31, 2017 Date

CDBG funds can be used for specific Eligible Activities as outlined in the Overview. Select one type of Eligible Activity category that best describes your Project.

Type of Eligible Activity (check one)

Activities Related to Housing	
Other Real Property Activities	
Public Facilities/Improvements	
Public Service	✓

Section A: Activity to be funded

A1. Briefly describe the Activity you are requesting to fund with CDBG. This will help determine eligibility.

This request is for a $20,551 grant to maintain our street outreach services at the same level and serve a greater number of youth. Last year, CDBG funding enabled us to hire an additional Street Outreach Worker for 25 hours a week. As a result of more street outreach hours, which also made extended hours at our Drop-in Center possible, we have served far more youth than expected. We projected an increase of 100-150 youth for a total of 550-600 served this year; as of December 31, we had already served 586 youth, and that number is expected to increase in the last two quarters of the funding period.

A2. Why is this Activity needed? Does it address a gap? Describe the degree of need, or the severity of a problem including cause, extent, location, frequency and duration that will be addressed by the project. Provide a description of service gaps the activity fills in the community. Additionally, supply data, such as demographics, reports and/or other information supporting your information and proving the need exists. **(Attach additional pages, if necessary)**

We estimate that each night, there are as many as 100 youth in Santa Fe who are homeless. There is almost always severe family disruption due to problems such as abuse, neglect, addiction. Some run away thinking they will be safer on the streets. Others were thrown-out due to being gay, pregnant, or simply not wanted. These unaccompanied youth, some minors, are on their own. We are seeing the number of homeless youth increasing, both on the streets and in our Drop-In Center. They need our help to begin building a different life. Our services provide them with the knowledge and skills they need to succeed; without our services, many of them have little chance of doing so. We are the only agency in Santa Fe addressing their needs with comprehensive services.

A.3 If applicable, what steps or phases will be taken to complete the Activity (provision of services, engineering/design, advertising, bidding, contract award, construction, etc.)?
Our Street Outreach Program is fully implemented. In order to continue the program without cutting street outreach and Drop-In Center hours, we need to receive CDBG funding for FY17-18. For the same amount, we can reach more youth with the same staffing: two Street Outreach Workers at 25 hours each weekly; a full-time Service Coordinator; and a full-time Program Director.

A.4 Describe the population that the Activity will serve and how this population will be served. Describe the outreach and recruitment activities which will be conducted to make the proposed activity services known and accessible to the targeted population. Please include where these outreach and recruitment activities will take place.

Many of these youth camp in the mountains, live in cars, or sleep in abandoned buildings. A great number depend on our services for food, water, clothing, toiletries and comprehensive support so they can move forward in life. Our Street Outreach Program has two components: street-based outreach and a Drop-In Center. Both serve youth up to age 21. Street-based outreach happens six days a week, generally in the afternoons and early evenings. Locations include Santa Fe Plaza, Cathedral Park, Pete's Place, skate parks and other places where youth congregate. Our Drop-In Center is now open every day. Young people who are newly homeless usually learn about our resources from other homeless youth or homeless adults.

A.5 Estimate the number of total persons / households that will benefit from the CDBG funded portion of this Activity: (Fill in Households OR Persons depending on the type of Activity you are providing).

Total number of clients you anticipate serving:		
Households:	OR	Persons: 625

A.6 Use the following Table 1 to break out the number of persons you anticipate serving at the low (30-50% AMI) and very low-income (< 30% AMI) levels and the type of client (Refer to overview of CDBG program for the most recent income amounts). Along with income, please anticipate the number of clients that are severely disabled adults, homeless persons, abused children, battered spouses, and illiterate adults, persons with AIDS, migrant farm workers, and elderly. (All of these clients fall under the presumed benefit categories as defined by CDBG and therefore, all under low or extremely low income). This would apply mainly to Public Service or Public Facilities/Improvements Activities.

Extremely Low Income (<30% AMI)	Low Income (31-50%)	Moderate Income 51-80%	Illiterate adults	Abused children	Severely Disabled Persons	Migrant Farm Workers	Elderly	Persons with AIDS	Homeless Persons
625	0	0	50	20	0	0	0	5	625

Table 1

A.7 Use the following Table 2 to breakout the number of households you anticipate serving at the income levels listed. (Refer to the 2016 AMI table on pg. 18 for the most recent income amounts). This would apply mainly to CDBG funding for housing projects such as Down Payment Assistance and Rehabilitation Activities.

Extremely Low Income (<30% AMI)	Low Income (31-50%)	Moderate Income (51-80%)	Non-low Moderate Income (81-100%)	Female Head of Household
625	0	0	0	0

Table 2

A.8 CDBG funded construction activities must be in compliance with local land use plans and zoning. Explain how the proposed activity conforms to local plans and zoning ordinances. Provide a copy of the page(s) of resource document(s), pertinent sections, and page(s). This only applies to projects where the CDBG funds will used for the actual construction, not acquisition.

N/A

A.9 Please describe the organization in terms of its administrative capacity and its qualifying experience and length of experience with activities or projects similar to the proposed Activity. Include purpose, goals, programs, activities, clients, and accomplishments, if any, in the area of activity for which funding is requested. Give examples of and list experience.

Youth Shelters and Family Services has been serving homeless, runaway and in-crisis youth since 1980. Our objective is for them to obtain safe and stable housing. In 1995, we began distributing sandwiches, clothing, tents, sleeping bags, toiletries and resource information to youth on the streets. That was the beginning of our Street Outreach Program. Today, we have five programs and a focused initiative that form a comprehensive continuum of services: **Youth Emergency Shelter,** a 24-hour safe haven for youth in crisis, ages 10-17, where they can sleep in a stable environment, eat three nutritious meals a day, obtain clothing, and receive counseling and support; **Transitional Living Program,** a supervised apartment setting for youth, ages 17-24, who *are in school, job training, or working as they transition to independence;* ***Street Outreach Program,*** which provides food, clothing, hygiene supplies, and support to youth up to age 21 through street-based services and a Drop-In Center; **Community Counseling Center,** which provides professional counseling for youth in every program, their families, and community members; **Access! Training and Education Community Collaborative,** a program that provides workforce, mentoring, and education opportunities for youth, ages 14-24, most of whom have had juvenile justice involvement; **Pregnant and Parenting Youth Initiative,** which provides safety, stability, and wellness for young families through access to pre- and post-natal care, education and other essential support.

A.10 Briefly describe your organizations experience in government contract administration, and knowledge of federal regulations governing acquisition, procurement, equal employment opportunity, and labor standards.

Youth Shelters and Family Services has extensive experience in government contract administration dating back at least 20 years. The agency is in compliance with federal regulations governing acquisition, procurement, equal employment opportunity, and labor standards. All fiscal records are maintained in accordance with generally accepted accounting principles (GAAP) and are in compliance with federal, state, and local legal and reporting requirements.

B. National Objective Compliance

1. Benefits Low/ Moderate Income persons/households by:	
Area Benefit (eligible area) (LMA)	
Limited Clientele (LMC)	X
Housing Activities (LMH)	
Job Creation or Retention (LMJ)	

B.2 Is the service area city wide: (X) yes ( )no
If no, fill out B.3.

B.3 If an activity is based on an area benefit, identify the Census Tract(s) and Block Group(s) that will be served. Make sure to read the Overview for a clear understanding of the requirements of an area benefit. Attach a map of the area.

Census Tract	Block Group	Total Population	Low/Mod Income Population	% Low/ Mod Income
Total				

B.4 Explain fully how the proposed project meets the CDBG National Objective selected above. Provide substantiating documentation supporting the claims. Refer to Overview for more detail.

Our public service project meets the CDBG National Objective to assist extremely low income persons. Since 100% of the served through our Street Outreach Program are homeless or nearly homeless, and according to our intake forms have extremely low or no income, they are Limited Clientele. (Nearly homeless means without a fixed address. They may be "couch surfing" among friends or staying in another temporary, unstable living situation, such as a motel).

CDBG funding will enable us to provide a greater number of homeless youth with access to basic necessities needed to survive, such as food, water, warm clothing and blankets. Street Outreach is often a gateway to other services in our continuum of support, such as our transitional living apartments.

We will address emergency needs and provide long-term solutions so homeless youth can leave the streets. They will be able to receive referrals for permanent housing, healthcare, mental health services, and substance abuse treatment as needed. Those resources would not otherwise be available to them.

This project meets the National Objective to Create a Suitable Living Environment as it will increase opportunities for at risk populations. We will help more homeless youth in our community access opportunities needed to escape long-term poverty.

C. Consolidated Plan Compliance

The City of Santa Fe provides guidance in its 2013-2017 Consolidated Plan on funding uses, whether Federal, State, City, or Private. In accordance with federal regulations, each project must be consistent with the priorities outlined in the City's Consolidated Plan. (See Consolidated Plan on City website) Mark the **one priority** that the proposed project will meet.

P-25 Priority Needs

Check	Priority Need Name	Priority Level	Population Served	Goals Addressed
	Rental Vouchers	High	Extremely low-income renters; people at risk of being homeless; persons with disabilities; homeless youth; veterans; elderly; families in transition; persons with HIV/AIDS and their families; public housing residents; mentally ill; chronic substance abusers; victims of domestic violence	Reduced rate of cost burden and corresponding drop in poverty rate for homeless households and those in danger of becoming homeless. *(Increase Opportunities for At Risk Populations);* Inventory of rental units and vouchers expanded to meet increased demand *(Increase Affordable Housing Opportunities)*
	Emergency Shelter *(note could be classified* as Public Service which is restricted in allocation amount)	High	Extremely low-income residents; chronic homeless; homeless youth; veterans; families in transition; mentally ill; chronic substance abusers; victims of domestic violence	Reduced rate of cost *burden and corresponding drop in* poverty rate for homeless households and those in danger of becoming homeless. *(Increase Opportunities for At Risk Populations)*
X	Support Services for Homeless or People at Risk of Homelessness (note could be classified as Public Service which is restricted in allocation amount)	High	Extremely low-income renters; people at risk of being homeless; persons with disabilities; homeless youth; veterans; elderly; families in transition; persons with HIV/AIDS and their families; public housing residents; mentally ill; chronic substance abusers; victims of domestic violence	Reduced rate of cost burden and corresponding drop in poverty rate for homeless households and those in danger of becoming homeless. *(Increase Opportunities for At Risk Populations)*
	Refinancing Services and Support for Current Homeowners	High	Low-income homeowners; homeowners in risk of foreclosure; homeowners in substandard housing	Reduced rate of cost burden and corresponding drop in poverty rate for homeless households and those in danger of becoming homeless. *(Increase Opportunities for At Risk Populations);* Increased homeownership opportunities and support for long term affordability and accessibility for current homeowners. *(Increase Affordable Housing Opportunities)*

Priority Needs (cont.)

Check	Priority Need Name	Priority Level	Population Served	Goals Addressed
	Homeowner Rehabilitation Programs, Energy-efficiency Upgrades, Accessibility Retrofits	High	Low- and moderate-income homeowners; residents in redeveloping or transitioning neighborhoods; homeowners living in aging or substandard housing stock; seniors who need to "age in place;" people with disabilities	Increased homeownership opportunities and support for long term affordability and accessibility for current homeowners. *(Increase Affordable Housing Opportunities);* Housing opportunities reflect emerging needs, changing demographics and are aligned with redevelopment projects, economic development objectives and sustainability goals *(Address Emerging and Current Needs and Changing Demographics)*
	Construction of affordably-priced homes for homeownership	Low	Low- and moderate-income homebuyers and current renters; local workforce	Increased homeownership opportunities and support for long term affordability and accessibility for current homeowners. *(Increase Affordable Housing Opportunities)*
	Fair Housing Outreach	High	Low- and moderate-income renters; low-income landlords; persons with disabilities; Spanish speakers; large families; general public	Housing opportunities reflect emerging needs, changing demographics and are aligned with redevelopment projects, economic development objectives and sustainability goals *(Address Emerging and Current Needs and Changing Demographics)*
	Diversity of Housing Types	Low	Low- and moderate-income renters; seniors; small households; entrepreneurs; aging veterans; entrepreneurs and other self-employed	Housing opportunities reflect emerging needs, changing demographics and are aligned with redevelopment projects, economic development objectives and sustainability goals *(Address Emerging and Current Needs and Changing Demographics)*
	Non-Housing Community Facilities and Services	High	Low- and moderate-income residents; residents in redeveloping or transitioning neighborhoods; youth	Housing opportunities reflect emerging needs, changing demographics and are aligned with redevelopment projects, economic development objectives and sustainability goals *(Address Emerging and Current Needs and Changing Demographics)*

Priority Needs (cont.)

Check	Priority Need Name	Priority Level	Population Served	Goals Addressed
	Provision of Rental Units and Support Services for LI/ VLI Renters	High	Low- and very low-income renters; persons transitioning out of homelessness; renters in need of support services; public housing residents	Inventory of rental units and vouchers expanded to meet increased demand *(Increase Affordable Housing Opportunities);* Housing opportunities reflect emerging needs, changing demographics and are aligned with redevelopment projects, economic development objectives and sustainability goals *(Address Emerging and Current Needs and Changing Demographics)*
	Rental Rehabilitation	Low	Low- and moderate-income renters; low-income landlords; residents of low- income neighborhoods that are redeveloping or in transition; public housing residents	Inventory of rental units and vouchers expanded to meet increased demand *(Increase Affordable Housing Opportunities);* Housing opportunities reflect emerging needs, changing demographics and are aligned with redevelopment projects, economic development objectives and sustainability goals *(Address Emerging and Current Needs and Changing Demographics)*
	Down Payment Assistance	High	Low- and moderate-income residents who are "buyer ready"; first responders (fire, police, etc.)	Increased homeownership opportunities and support for long term affordability and accessibility for current homeowners. *(Increase Affordable Housing Opportunities)*
	Homebuyer Training & Counseling	High	Low- and moderate-income homebuyers; current renters	Increased homeownership opportunities and support for long term affordability and accessibility for current homeowners. *(Increase Affordable Housing Opportunities)*

D. Budget

D1. Describe the Proposed Budget for this Activity. Please explain all budgeted expenses including contractual services, personnel services, commodities, and capital outlay. Also explain what the CDBG funds will be used for. Also explain the effect of not receiving any or only a portion of a CDBG allocation has on the project budget.

The budget for our Street Outreach Program is $186,000. This includes personnel, facilities rental for our Drop-In Center, and service delivery costs such as case management. We are requesting $20,551 in CDBG funding to maintain existing staffing and service hours, which will enable us to reach additional homeless youth.

If we do not receive CDBG funding, or are awarded less, we will examine other options, including scaling the project accordingly. We will also work diligently to make-up the funding from other sources. Delivering services to more youth in need is a current priority of the program.

D.2 Please complete the following table to identify the funding sources and amounts. Indicate total project cost that incorporates the total CDBG request and what funds or services, if any, the sponsor and/or other agencies will contribute. Also enter other ***committed*** funding sources (committed funds are funds available or will be available to fund the Activity during the CDBG Fiscal Year). Please be as accurate as possible. Should your organization be awarded funding, a revised budget (as needed) will become an Addendum to the CDBG Contract.

Type of funding	Source/ amount	Source/ amount	Source/ amount	Totals
Requested CDBG amount				$20,551
Other HUD funds i.e. HOME, Section 108				$0
Other Federal Funds				$0
City Funding i.e. Youth and Family, Human Services	Children and Youth Commission			$57,400
State funding, i.e. MFA				$0

Other i.e. in- kind, private funds	Foundations and private restricted grants: $80,000	$10,000: in-kind gifts (tents, sleeping bags, food, water)	$18,049 allocated unrestricted grants, donations	**$108,049**

Total of all funding sources		**$186,000**

D.3 If you are proposing to utilize CDBG funds to pay for staff costs, please list each position title and the percentage of their salary and benefits that will be funded by CDBG. Depending on the Activity, listing this information does not guarantee the position will be funded by CDBG as it may not be eligible.

PERSONNEL Position Title	**New (Y/N)**	**% salary & benefits paid for with CDBG**
Salary: Program Director	N	(5-10% of FTE for 12 months)
Salary: Outreach Worker	N	(90-100% of .625 FTE for 12 months)

E. Performance Measurement System/Work Plan

CDBG/ Work Plan - FY 2017-2018

Provide the performance measurement goals, objectives and outcomes for your proposed CDBG project. Please refer to Exhibit B at the end of this document. Based on these measurements, attach a Work Plan that describes the goals, objectives and outcomes in greater detail and be:

(B) Specific
(C) Measurable
(D) Achievable
(E) Results-orientated
(F) Time bound

F. Submittal Requirements: Required Attachments

Please attach one (1) unbound copy of the following items <u>in the following order:</u>

X Transmittal Letter

On your organization's letterhead, prepare a brief letter outlining the following:

- A brief summary of your proposed project;
- Funding amount requested; and
- Name, telephone number and address of a contact person(s)

X Board of Directors' Authorization to Request Funds

X Work Plan (as noted above)

X Certificate of Non-profit Incorporation

X IRS documentation showing qualification as a nonprofit corporation under Section 501(c) (3), and most recently submitted Federal Tax Return (Form 990 or 990EZ) or other financial statement.

X Organization Chart

X Copy of Agency's most Recent Independent Audit

X Agency's accounting and procurement policies

X Confidentiality and Disclosure of Information

CITY OF SANTA FE
COMMUNITY DEVELOPMENT BLOCK GRANT (CDBG)
PROPOSAL SCORE SHEET / Bid Number '17/22/RFP

Name of Applicant/Project: _____

Amount Requested: $_____

Evaluation Criteria	Weighted Value	Evaluation Points 1 thru 5	Total Score	Max Score
Activity to be funded • Why needed? Does it address a gap? • Steps/phases to complete the activity • Who is served? • #s proposed to be served	20	X _____		100
National Objective Compliance • Benefits low/moderate income persons/households? • Prevents slum/blight • Does the activity serve residents Citywide or a Low to Moderate Income (LMI) Area (i.e. Census Tract)?	20	X _____		100
Consolidated Plan Compliance • Does the application demonstrate that it meets Consolidated Plan priorities?	10	X _____		50
Budget • Is proposed budget realistic? • Are other funding sources secured?	10	X _____		50
Performance Measurement/Work Plan • Are performance measurements, outcomes and proposed outcomes well presented? Realistic? Well-supported in the application? • Does the applicant have the administrative capacity to carry out the activity to be funded?	20	X _____		100
		Total Points		**400**

CITY OF SANTA FE
COMMUNITY DEVELOPMENT BLOCK GRANT (CDBG)
PROPOSAL SCORE SHEET / Bid Number '17/22/RFP

Name of Applicant/Project: St. Elizabeth - Casa Corrillos (CDBG)

Amount Requested: $ 43,700.00

Evaluation Criteria	Weighted Value	Evaluation Points 1 thru 5	Total Score	Max Score
Activity to be funded • Why needed? Does it address a gap? • Steps/phases to complete the activity • Who is served? • #s proposed to be served	20	X 2	40	100
National Objective Compliance • Benefits low/moderate income persons/households? • Prevents slum/blight • Does the activity serve residents Citywide or a Low to Moderate Income (LMI) Area (i.e. Census Tract)?	20	X 3	60	100
Consolidated Plan Compliance • Does the application demonstrate that it meets Consolidated Plan priorities?	10	X 3	30	50
Budget • Is proposed budget realistic? • Are other funding sources secured?	10	X 2	20	50
Performance Measurement/Work Plan • Are performance measurements, outcomes and proposed outcomes well presented? Realistic? Well-supported in the application? • Does the applicant have the administrative capacity to carry out the activity to be funded?	20	X 3	60	100
		Total Points	210	**400**

CDC Evaluator Name _____ Signature _____ Date 02/14/17

CITY OF SANTA FE (CSF)
NON-DISCLOSURE AND CONFLICT OF INTEREST STATEMENT

REQUEST FOR PROPOSAL #'17/22/P

EVALUATOR NAME: John A. Padilla.

CSF policy is to prevent personal or organizational conflict of interest, or the appearance of such conflict of interest, in the award and administration of CSF contracts and Purchase Orders.

I, John A. Padilla., the undersigned, hereby certify that the following statements are true and correct and that I understand and agree to be bound by commitments contained herein.

I am acting at the request of CSF as a participant in the evaluation of *offers/ proposals* received in response to the *Request for Offers/ Request for Proposals,* entitled and/ or numbered
I am acting of my own accord and not acting under duress. I am not currently employed by, nor am I receiving any compensation from, nor have I been the recipient of any present or future economic opportunity, employment, gift, loan, gratuity, special discount, trip, favor, or service in connection with any *offer/ proposal* or involved *Offeror/Proposer* in return for favorable consideration. I have no preconceived position on the relative merits of any of the *offers/ proposals* nor have I established a personal preference or position on the worth or standing of any *Offeror/ Proposer* participating in this action. CSF policy is to prevent personal or organizational conflict of interest, or the appearance of such conflict of interest, in the award and administration of CSF contracts, including, but not limited to contracts for professional services, agreements with consultants and Purchase Orders.

I hereby certify that to the best of my knowledge and belief, no conflict of interest exists that may diminish my capacity to perform an impartial, technically sound, objective review of this proposal(s) or otherwise result in a biased opinion or unfair competitive advantage.
I agree not to disclose or otherwise divulge any information pertaining to the contents, status, or ranking of any *offer/ proposal* to anyone other than the team leader or other evaluation team members. I understand the terms and "disclose or otherwise divulge" to include, but are not limited to, reproduction of any part or any portion of any *offer/ proposal,* or removal of same from designated areas without prior authorization from the evaluation team leader. I agree to perform any and all evaluations of said *offers/ proposals* in an unbiased manner, to the best of my ability, and with the best interest of CSF paramount in all decisions.
I agree to return to CSF Purchasing Department all copies of proposals, as well as any abstracts, upon completion of the evaluation.

SIGNATURE AND DATE: 02/14/17

Cover Page

City of Santa Fe Community Development Block Grant Program FY 2017-2018	
Name of Nonprofit Organization:	St. Elizabeth Shelter
Name of Executive Director:	Deborah Tang
Name of Board President:	Sam Baca
Name, Contact Information (Address, Phone, and Email) of Person Submitting Request (Fiscal Agent if appropriate):	Jim Podesta 804 Alarid St.. Santa Fe, NM 87505 982-6611 x 105 development@steshelter.org
Amount Requested:	$43,750
Program Name or Service being requested for Funding:	Casa Cerrillos Supportive Housing
Brief Program or Service Description:	Casa Cerrillos provides permanent housing for homeless individuals with disabilities along with a wide range of supportive services designed to help them maintain their housing and independence.
Check which Category Describes your organization: 8. ✓ Private Non-Profit 9. For Profit 10. Public Agency 11. Government Agency	
DUNS or CAGE #	612433912
Business Registration #	16-00074247
Tax ID #	85-1347650
State CRS #	02-059151-009
Check One:	☒ Previous Recipient ☐ New Applicant
Funding Categories to be Addressed (Circle one):	☐ Housing ☑ Public Facility ☐ Public Service

Project Proposal Summary
(If funded, the following will be written into the contract Scope of Services with Accomplishment Levels along with details provided in Section A)

Activity Name	Casa Cerrillos Attic & Ventilation Renovation
Brief Summary of the activity	Repair five remaining original attic units to improve ventilation and maintain structural integrity of the building.

Amount of CDBG funding requested for Activity	$43,750
Total budget of Activity	$43,750

To the best of my knowledge and belief, all data in this application is true and correct. If funded, I certify that the Applicant Organization is willing and able to adhere to the polices and procedures specified by the City of Santa Fe and all applicable program regulations of the US Department of Housing and Urban Development. Further, I understand there is not an agreement until the City of Santa Fe and the individual authorized to execute contracts on behalf of the Applicant Organization has signed the contract.

Deborah Tang — Exec. Director — 1/31/17

Authorized Signature *(sign in blue ink)* — Title — Date

CDBG funds can be used for specific *Eligible Activities as outlined in the Overview.* Select one type of Eligible Activity category that best describes your Project.

Type of Eligible Activity (check one)

Activities Related to Housing	
Other Real Property Activities	
Public Facilities/Improvements	X
Public Service	

Section A: Activity to be funded

A1. Briefly describe the Activity you are requesting to fund with CDBG. This will help determine eligibility.

Casa Cerrillos is a two-story, two-building, 28-unit apartment complex that provides permanent housing along with supportive services for homeless individuals with disabilities. There is an attic space designed to provide ventilation above the second floors of each building and below the roof - six spaces in all - that are in a rapidly deteriorating structural condition and no longer provide ventilation to the units below. We have repaired one of the units and now seek funding for the remaining five others.

A2. Why is this Activity needed? Does it address a gap? Describe the degree of need, or the severity of a problem including cause, extent, location, frequency and duration that will be addressed by the project. Provide a description of service gaps the activity fills in the community. Additionally, supply data, such as demographics, reports and/or other information supporting your information and proving the need exists. **(Attach additional pages, if necessary)**

The complex was built in the 1950s and the attic spaces are deteriorating. The ventilation grates are clogged, leading to water vapor buildup. We repaired one of the six spaces to clean the grates and found it had interior structural damage as well, necessitating new interior framing and roof supports. The cost was far above what was anticipated and beyond our ongoing budget challenges. But realizing the need to proceed with this renovation to preserve and maintain the property for its homeless tenants, we request CDBG funding. The complex is much needed as two-thirds of the 2,000 homeless individuals we serve each year have a disability.

A.3 If applicable, what steps or phases will be taken to complete the Activity (provision of services, engineering/design, advertising, bidding, contract award, construction, etc.)?

The original contractor used for the one unit advised us as to the state of damage and advised repairing the remaining spaces. We had him and two other firms examine the spaces and provide the enclosed bids. If funding is obtained, we will select a contractor and proceed with the renovation in July 2017, completing it by autumn.

A.4 Describe the population that the Activity will serve and how this population will be served. Describe the outreach and recruitment activities which will be conducted to make the proposed activity services known and accessible to the targeted population. Please include where these outreach and recruitment activities will take place.

Casa Cerrillos provides 28 apartments to homeless individuals with disabilities, has a 100% occupancy rate with a waiting list and is well known among other homeless-serving organizations in the community. Last year, it housed 40 people with 8,562 bed nights and 5,896 units of case management. Six of the 12 people leaving during the year moved into housing of their own,with two going to psychiatric or drug-abuse facilities. Two others died in place. The residents are very health challenged with 76% presenting three or more diagnosed physical or mental health conditions. Each resident creates an Individual Service Plan to address the issues leading to their becoming homeless and/or health challenges. The goal is for them to maintain their housing there or elsewhere while improving their health and quality of life.

A.5 Estimate the number of total persons / households that will benefit from the CDBG funded portion of this Activity: (Fill in Households OR Persons depending on the type of Activity you are providing).

Total number of clients you anticipate serving:		
Households: 40	**OR**	Persons: 40

A.6 Use the following Table 1 to break out the number of persons you anticipate serving at the low (30-50% AMI) and very low-income (< 30% AMI) levels and the type of client (Refer to overview of CDBG program for the most recent income amounts). Along with income, please anticipate the number of clients that are severely disabled adults, homeless persons, abused children, battered spouses, and illiterate adults, persons with AIDS, migrant farm workers, and elderly. (All of these clients fall under the presumed benefit categories as defined by CDBG and therefore, all under low or extremely low income). This would apply mainly to Public Service or Public Facilities/Improvements Activities.

Extremely Low Income (<30% AMI)	Low Income (31-50%)	Moderate Income 51-80%	Illiterate adults	Abused children	Severely Disabled Persons	Migrant Farm Workers	Elderly	Persons with AIDS	Homeless Persons
36	4		1		40				40

Table 1

A.7 Use the following Table 2 to breakout the number of households you anticipate serving at the income levels listed. (Refer to the 2016 AMI table on pg. 18 for the most recent income amounts). This would apply mainly to CDBG funding for housing projects such as Down Payment Assistance and Rehabilitation Activities.

Extremely Low Income (<30% AMI)	Low Income (31-50%)	Moderate Income (51-80%)	Non-low Moderate Income (81-100%)	Female Head of Household
36	4			17

Table 2

A.8 CDBG funded construction activities must be in compliance with local land use plans and zoning. Explain how the proposed activity conforms to local plans and zoning ordinances. Provide a copy of the page(s) of resource document(s), pertinent sections, and page(s). This only applies to projects where the CDBG funds will used for the actual construction, not acquisition.

Casa Cerrillos is already zoned for current use and the renovation will not affect this.

A.9 Please describe the organization in terms of its administrative capacity and its qualifying experience and length of experience with activities or projects similar to the proposed Activity. Include purpose, goals, programs, activities, clients, and accomplishments, if any, in the area of activity for which funding is requested. Give examples of and list experience.

St. Elizabeth Shelter has been providing services to homeless individuals since 1986, and currrent administrative staff have been in place for 11 years. We operate and maintain five separate housing facilities - two emergency shelters and three longer-term programs (like Casa Cerrillos) - all requiring ongoing repair and renovation, while assisting 2,000 people every year. We work together with our guests to help them address issues leading to their homelessness, obtain income and find housing.

A.10 : Briefly describe your organizations experience in government contract administration, and knowledge of federal regulations governing acquisition, procurement, equal employment opportunity, and labor standards.

We have successfully obtained and administered at least five CDBG contracts in recent years and are fully aware of federal regulations, including Davis Bacon, regarding such projects. St. Elizabeth also receives three HUD, two NM Mortgage Finance Authority and Santa Fe City grants, all having similar reporting and monitoring standards, for which we have met and surpassed all inspections and audits.

B. National Objective Compliance

1. Benefits Low/ Moderate Income persons/households by:	
Area Benefit (eligible area) (LMA)	
Limited Clientele (LMC)	X
Housing Activities (LMH)	
Job Creation or Retention (LMJ)	

B.2 Is the service area city wide: (✓) yes ( )no
If no, fill out B.3.

B.3 If an activity is based on an area benefit, identify the Census Tract(s) and Block Group(s) that will be served. Make sure to read the Overview for a clear understanding of the requirements of an area benefit. Attach a map of the area.

Census Tract	Block Group	Total Population	Low/Mod Income Population	% Low/ Mod Income
Total				

B.4 Explain fully how the proposed project meets the CDBG National Objective selected above. Provide substantiating documentation supporting the claims. Refer to Overview for more detail.

The proposed project will help maintain Casa Cerrillos so it can continue meeting the housing needs of the area's homeless adults with disabilities while providing them with needed supportive services to help them obtain income and/or entitled benefits, better address their healthcare issues, maintain housing and improve their quality of life.

C. Consolidated Plan Compliance

The City of Santa Fe provides guidance in its 2013-2017 Consolidated Plan on funding uses, whether Federal, State, City, or Private. In accordance with federal regulations, each project must be consistent with the priorities outlined in the City's Consolidated Plan. (See Consolidated Plan on City website) Mark the **one priority** that the proposed project will meet.

P-25 Priority Needs

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✓	Emergency Shelter (note could be classified as Public Service which is restricted in allocation amount)	High	Extremely low-income residents; chronic homeless; homeless youth; veterans; families in transition; mentally ill; chronic substance abusers; victims of domestic violence	Reduced rate of cost burden and corresponding drop in poverty rate for homeless households and those in danger of becoming homeless. *(Increase Opportunities for At Risk Populations)*
	Support Services for Homeless or People at Risk of Homelessness (note could be classified as Public Service which is restricted in allocation amount)	High	Extremely low-income renters; people at risk of being homeless; persons with disabilities; homeless youth; veterans; elderly; families in transition; persons with HIV/AIDS and their families; public housing residents; mentally ill; chronic substance abusers; victims of domestic violence	Reduced rate of cost burden and corresponding drop in poverty rate for homeless households and those in danger of becoming homeless. *(Increase Opportunities for At Risk Populations)*
	Refinancing Services and Support for Current Homeowners	High	Low-income homeowners; homeowners in risk of foreclosure; homeowners in substandard housing	Reduced rate of cost burden and corresponding drop in poverty rate for homeless households and those in danger of becoming homeless. *(Increase Opportunities for At Risk Populations);* Increased homeownership opportunities and support for long term affordability and accessibility for current homeowners. *(Increase Affordable Housing Opportunities)*

Priority Needs (cont.)

Check	Priority Need Name	Priority Level	Population Served	Goals Addressed
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	Construction of affordably-priced homes for homeownership	Low	Low- and moderate-income homebuyers and current renters; local workforce	Increased homeownership opportunities and support for long term affordability and accessibility for current homeowners. *(Increase Affordable Housing Opportunities)*
	Fair Housing Outreach	High	Low- and moderate-income renters; low-income landlords; persons with disabilities; Spanish speakers; large families; general public	Housing opportunities reflect emerging needs, changing demographics and are aligned with redevelopment projects, economic development objectives and sustainability goals *(Address Emerging and Current Needs and Changing Demographics)*
	Diversity of Housing Types	Low	Low- and moderate-income renters; seniors; small households; entrepreneurs; aging veterans; entrepreneurs and other self-employed	Housing opportunities reflect emerging needs, changing demographics and are aligned with redevelopment projects, economic development objectives and sustainability goals *(Address Emerging and Current Needs and Changing Demographics)*
	Non-Housing Community Facilities and Services	High	Low- and moderate-income residents; residents in redeveloping or transitioning neighborhoods; youth	Housing opportunities reflect emerging needs, changing demographics and are aligned with redevelopment projects, economic development objectives and sustainability goals *(Address Emerging and Current Needs and Changing Demographics)*

Priority Needs (cont.)

Check	Priority Need Name	Priority Level	Population Served	Goals Addressed
	Provision of Rental Units and Support Services for LI/ VLI Renters	High	Low- and very low-income renters; persons transitioning out of homelessness; renters in need of support services; public housing residents	Inventory of rental units and vouchers expanded to meet increased demand *(Increase Affordable Housing Opportunities);* Housing opportunities reflect emerging needs, changing demographics and are aligned with redevelopment projects, economic development objectives and sustainability goals *(Address Emerging and Current Needs and Changing Demographics)*
	Rental Rehabilitation	Low	Low- and moderate-income renters; low-income landlords; residents of low- income neighborhoods that are redeveloping or in transition; public housing residents	Inventory of rental units and vouchers expanded to meet increased demand *(Increase Affordable Housing Opportunities);* Housing opportunities reflect emerging needs, changing demographics and are aligned with redevelopment projects, economic development objectives and sustainability goals *(Address Emerging and Current Needs and Changing Demographics)*
	Down Payment Assistance	High	Low- and moderate-income residents who are "buyer ready"; first responders (fire, police, etc.)	Increased homeownership opportunities and support for long term affordability and accessibility for current homeowners. *(Increase Affordable Housing Opportunities)*
	Homebuyer Training & Counseling	High	Low- and moderate-income homebuyers; current renters	Increased homeownership opportunities and support for long term affordability and accessibility for current homeowners. *(Increase Affordable Housing Opportunities)*

D. Budget

D1. Describe the Proposed Budget for this Activity. Please explain *all budgeted* expenses including contractual services, personnel services, commodities, and capital outlay. Also explain what the CDBG funds will be used for. Also explain the effect of not receiving any or only a portion of a CDBG allocation has on the project budget.

Construction costs (5 attic units @ $8,750/unit) come to $43,750 and CDBG funding is requested for this. We will repair as many units as the CDBG allocation allows as capital funding for this and all St. Elizabeth programs is severely limited. But if a substantial proportion of funds are allocated, our board will authorize additional operational funds for completion.

D.2 Please complete the following table to identify the funding sources and amounts. Indicate total project cost that incorporates the total CDBG request and what funds or services, if any, the sponsor and/or other agencies will contribute. Also enter other ***committed*** funding sources (committed funds are funds available or will be available to fund the Activity during the CDBG Fiscal Year). Please be as accurate as possible. Should your organization be awarded funding, a revised budget (as needed) will become an Addendum to the CDBG Contract.

Type of funding	Source/ amount	Source/ amount	Source/ amount	Totals
Requested CDBG amount				$ 43,750
Other HUD funds i.e. HOME, Section 108				$
Other Federal Funds				$
City Funding i.e. Youth and Family, Human Services				$
State funding, i.e. MFA				$
Other i.e. in- kind, private funds				$

Total of all funding sources		**$** 43,750

D.3 If you are proposing to utilize CDBG funds to pay for staff costs, please list each position title and the percentage of their salary and benefits that will be funded by CDBG. Depending on the Activity, listing this information does not guarantee the position will be funded by CDBG as it may not be eligible.

PERSONNEL Position Title	**New (Y/N)**	**% salary & benefits paid for with CDBG**

E. Performance Measurement System/Work Plan

CDBG/ Work Plan - FY 2017-2018

<u>Provide the performance measurement goals, objectives and outcomes</u> for your proposed CDBG project. Please refer to Exhibit B at the end of this document. Based on these measurements, attach a Work Plan that describes the goals, objectives and outcomes in greater detail and be:

(B) Specific
(C) Measurable
(D) Achievable
(E) Results-orientated
(F) Time bound

ST. ELIZABETH SHELTER
CASA CERRILLOS ATTIC REPAIR
CDBG WORK PLAN 2017-2018

St. Elizabeth Shelter's mission is to provide needed programs and services to homeless men, women and children from Santa Fe and Northern New Mexico. **Our goal is to move as many people as possible from homelessness into housing** as numerous studies document the deleterious effects of living on the streets and the lifestyle improvements – greater stability and security, reduced healthcare issues, less incidence and interaction with law enforcement, and overall reduced societal costs – when housed. Last year, 57 percent of those leaving one of our five residential programs – 361 individuals – successfully achieved this outcome.

One of the more challenging homeless cohorts is those with disabilities and often co-occurring alcohol and/or substance abuse. This is the population that Casa Cerrillos is designed to specifically serve. The 28-unit apartment complex provides safe housing with significantly below market rents along with a wide range of supportive services for a community of individuals sharing similar difficulties.

But the complex is more than 50 years old and requires ongoing maintenance and repair. It has two separate two-story buildings each with attic space above the second floor for ventilation. Over time, the ventilation units have become clogged and blocked and the actual space compromised by water damage. We have repaired one of the six attic units and need to continue with the remaining five. Since **our objective is to continue providing decent housing for homeless individuals**, repairing the attics will maintain the structural integrity of the complex as well as provide better living conditions for the residents directly below. **The outcome will be continued availability and accessibility of this housing for homeless individuals with disabilities.**

Our plan is to secure CDBG funding, hire one of the three contractors who have examined the space and then complete the repairs. The project is specific since we know what needs to be done, on-site examinations have been completed and bids for repair secured. It will be measurable as repairs progress until work is completed. It is achievable since one of the six units already has been repaired and the rest can be as well if CDBG funding is awarded at the requested level or at a significant percentage of the total needed. It is results-oriented as it will provide a fully repaired space that will maintain the building's integrity for many more years. Finally, it is time-bound as it will begin in the summer once funding is available and proceed quickly to minimize disruption to the residents living below.

Southwest Plastering Co., Inc.

Michael A. Roybal • President • 2925 Rufina St., Santa Fe, NM 87507
License No. 058364 •Telephone (505) 438-6599 • Fax (505) 438-4247

To: St. Elizabeth Shelter

Email: director@steshelter.org
Phone: (505)982-6611

Job Site: Casa Cerrillos
3811 ½ Cerrillos Rd.
Santa Fe, NM 87507

Date: January 27, 2017

PROPOSAL/CONTRACT SPECIFICATIONS

General Description: Install proper venting at all units. The existing vents are too small and some units only have one vent. Two large vents will be installed at each unit in the portal ceiling that vents into the units. Replace framing as need and open up the drywall walls in the attic areas to allow for proper air flow.

Contract Total	**$8,750.00**
30% down	**$2,625.00**

OWNER / CONTRACTOR

Agree to pay billed incremental amounts based upon completed work. Agree to pay bills within ten working days of invoice receipt. Failure to pay will result in the additional charge of 2% per month of the unpaid balance plus attorney fees and the cost of collection of the unpaid balance.

SOUTHWEST PLASTERING

Southwest Plastering Company agrees to furnish all labor and materials for the completion of the specified work. All insurance's are provided by Southwest Plastering Company insurance plans. We will supply an outside toilet and maintain a clean work site area, as well as take care NOT to damage any plants, landscaping, and/or artwork. All windows and wood work is masked with either paper or plastic and kept clean. Proposal/Contract amounts not valid after 30 days.

Southwest Plastering Co.

St. Elizabeth Shelter

Santa Fe Style Builders, LLC.
2925 Rufina St., Santa Fe, NM 87507 • License No. 92756
Telephone (505) 438-6138 • Fax (505) 438-4247

To: St. Elizabeth Shelter

Email: director@steshelter.org
Phone: (505)982-6611

Job Site: Casa Cerrillos
3811 ½ Cerrillos Rd.
Santa Fe, NM 87507

Date: January 27, 2017

PROPOSAL/CONTRACT SPECIFICATIONS

General Description: Vent all units with a double vent system to insure proper air convection. Replace rotten framing as needed.

Contract Subtotal	$9,150.00
Tax (8.3125%)	760.59
Contract Total	**$9,910.59**
30% down	**$2,973.18**

OWNER / CONTRACTOR

Agree to pay billed incremental amounts based upon completed work. Agree to pay bills within ten working days of invoice receipt. Failure to pay will result in the additional charge of 2% per month of the unpaid balance plus attorney fees and the cost of collection of the unpaid balance.

SANTA FE STYLE BUILDERS

Santa Fe Style Builders agrees to furnish all labor and materials for the completion of the specified work. All insurance's are provided by Santa Fe Style Builders Company insurance plans.
We will supply an outside toilet and maintain a clean work site area, as well as take care NOT to damage any plants, landscaping, and/or artwork. All windows and wood work is masked with either paper or plastic and kept clean. Proposal/Contract amounts not valid after 30 days.

Santa Fe Style Builders, LLC.

St. Elizabeth Shelter

ATC
Construction, LLC
Anthony Tapia
Lic. No. 81459
702 Don Felix St.
Santa Fe, NM 87501
(505) 989-7053
(505) 690-3718

To: St. Elizabeth Shelter
3811 ½ Cerrillos Rd.
Santa Fe, NM 87507

Date: January 27, 2017

Email: director@steshelter.org

PROPOSAL

Description: Install new vents at all apartments. Each apartment will take two vents larger than the existing ones. Repair framing as needed.

Subtotal	$9,925.00
Tax 8.3125%	825.02
Total	**$10,750.02**

Anthony Tapia

St. Elizabeth Shelter

F. Submittal Requirements: Required Attachments

Please attach one (1) unbound copy of the following items <u>in the following order:</u>

X Transmittal Letter

X On your organization's letterhead, prepare a brief letter outlining the following:

- A brief summary of your proposed project;
- Funding amount requested; and
- Name, telephone number and address of a contact person(s)

X Board of Directors' Authorization to Request Funds

X Work Plan (as noted above)

X Certificate of Non-profit Incorporation

X IRS documentation showing qualification as a nonprofit corporation under Section 501(c) (3), and most recently submitted Federal Tax Return (Form 990 or 990EZ) or other financial statement.

X Organization Chart

X Copy of Agency's most Recent Independent Audit

X Agency's accounting and procurement policies

X Confidentiality and Disclosure of Information

CITY OF SANTA FE
AFFORDABLE HOUSING TRUST FUND (AHTF)
PROPOSAL SCORE SHEET / Bid Number '17/TBD/RFP

Name of Applicant/Project: St. Elizabeth · Sivingo (AHTF.)
Amount Requested: $ 63,870

CRITERIA	Weighted Value	Evaluation Points (1-5)	Total Points	Max. Score
Funding • Leverage amounts from other sources • Operating budget shows evidence of sufficient revenue to administer the proposed program • Secured matching resources	20%	3	60	100
Need/Benefit & Project Feasibility Data driven analysis that shows: • The proposal is responsive to current and future market demand • Income mix, if applicable • Site control • Realistic time frame for completion of funded project/program activities	40%	2	80	200
Affordability • The proposal meets the Affordability Requirements serving households of up to 120% AMI	20%	4	80	100
Demonstrated Capability – Organizational Management • Staff • Organizational Experience • Expertise in type(s) of housing or service(s) proposed • Demonstrated Financial Soundness	20%	3	60	100
TOTAL	100%		280	500

EVALUATION POINTS: 1 -- Lowest 5 – Highest

02/14/15.

CDC Evaluator Name Signature Date

CITY OF SANTA FE (CSF)
NON-DISCLOSURE AND CONFLICT OF INTEREST STATEMENT

REQUEST FOR PROPOSAL #'17/28/P

EVALUATOR NAME: John A. Padilla.

CSF policy is to prevent personal or organizational conflict of interest, or the appearance of such conflict of interest, in the award and administration of CSF contracts and Purchase Orders.

I, John A. Padilla., the undersigned, hereby certify that the following statements are true and correct and that I understand and agree to be bound by commitments contained herein.

I am acting at the request of CSF as a participant in the evaluation of *offers/ proposals* received in response to the *Request for Offers/ Request for Proposals,* entitled and/ or numbered
I am acting of my own accord and not acting under duress. I am not currently employed by, nor am I receiving any compensation from, nor have I been the recipient of any present or future economic opportunity, employment, gift, loan, gratuity, special discount, trip, favor, or service in connection with any *offer/ proposal* or involved *Offeror/Proposer* in return for favorable consideration. I have no preconceived position on the relative merits of any of the *offers/ proposals* nor have I established a personal preference or position on the worth or standing of any *Offeror/ Proposer* participating in this action. CSF policy is to prevent personal or organizational conflict of interest, or the appearance of such conflict of interest, in the award and administration of CSF contracts, including, but not limited to contracts for professional services, agreements with consultants and Purchase Orders.

I hereby certify that to the best of my knowledge and belief, no conflict of interest exists that may diminish my capacity to perform an impartial, *technically sound, objective* review of this proposal(s) or otherwise result in a biased opinion or unfair competitive advantage.
I agree not to disclose or otherwise divulge any information pertaining to the contents, status, or ranking of any *offer/ proposal* to anyone other than the team leader or other evaluation team members. I understand the terms and "disclose or otherwise divulge" to include, but are not limited to, reproduction of any part or any portion of any *offer/ proposal,* or removal of same from designated areas without prior authorization from the evaluation team leader. I agree to perform any and all evaluations of said *offers/ proposals* in an unbiased manner, to the best of my ability, and with the best interest of CSF paramount in all decisions.
I agree to return to CSF Purchasing Department all copies of proposals, as well as any abstracts, upon completion of the evaluation.

02/14/17

SIGNATURE AND DATE:

2017-2018 AHTF APPLICATION

General Information

Applicant Name(s): St. Elizabeth Shelter
Address: 804 Alarid St

Federal Tax ID #: 85-0347650
City Business Reg. #: 16-00029484
CRS#: 02-059151-009
City/State/Zip Code: Santa Fe, NM 87505
Telephone: 505-982-6611
Project Contact: Jim Podesta
Email Address: development@steshelter.org

Amount of Allocation Requested: $ 63,840

Type of Applicant:

☐ Partnership ☐ Corporation ☒ Non-Profit* ☐ Other

* Non-profit must provide proof of non-profit status. This proof includes submittal of current registration as charitable organization with the NM Attorney General's Office, covering the most recent Fiscal Year, or proof of exemption. Information can be obtained online at https://secure.nmag.gov/coros/. Verification should be in the form of the first page of the "NM Charitable Organization Statement."

Project Name: Siringo Senior Housing Program Bathroom Remodel
Project Address (if applicable): 1905 Siringo Road
City/State/Zip Code: Santa Fe, NM 87505

Priority Project

Select one of the categories your project falls under:

☐ **Rental Vouchers** - Provide supported rental vouchers (includes access to counseling, health services, case management, and other services) to renters earning less than 50%AMI;

☒ **Emergency Shelters including permanent supported shelter housing** - Development, construction, and preservation of shelter/permanent supported rental facilities, including infrastructure improvements;

☐ **Provision of Rental Units and Support Services for Low Income (up to 50% AMI) and Extremely Low Income Renters (less than 30% AMI)** - Acquisition, conversion, preservation and new construction of tiered income multi-family rental properties; including infrastructure or one-time emergency rental assistance;

☐ **Down payment Assistance/Increase of Ownership Opportunities** - Down payment assistance in the form of soft-second mortgage that "buys down" principal amount of loan to lower monthly payment; Acquisition, conversion, preservation and new construction of homeownership housing;

☐ **Homeowner Rehabilitation Programs, Energy Efficiency Upgrades, Accessibility Retrofits** - Aacquisition, conversion, and preservation of affordable housing that accommodates needs of current householders.

Project Description:

Please provide a narrative of your project. Specifically who will be served, anticipated outcomes, etc. (If needed continue on a separate sheet)

St. Elizabeth's Siringo Senior Housing Program provides 8 apartments along with a wide range of supportive services for formerly homeless seniors 55 and older. Below-market rents are set at one-third of each resident's monthly income. All residents are very low income, have disabilities and work closely with the on-site program manager to address the issues that led to their becoming homeless - alcohol and/or substance abuse, behavioral health, poor life skills, etc - in order to maintain their housing and independence. All feel comfortable there after many years or a life being homeless and view it as their final residence. Several have died in place there over the past few years. Since they are handicapped seniors, we intend to age-appropriately renovate the bathrooms to make their lives easier by removing the bathtubs, installing walk-in showers, add strategically placed grab-bars and retile the floors.

1. Funding:

How will the AHTF allocation be used for this project? What additional funding sources are secured or will be secured upon receipt of allocation? The City of Santa Fe requires financing from other sources to be committed prior to the release of funds from the AHTF.

St. Elizabeth serves more than 2,000 homeless individuals per year, including providing emergency shelter and supportive services to more than 650 without any charge, along with transitional and permanent housing to more than 100 at a very below-market rent (one-third of monthly income). Doing so requires an annual operating budget of nearly $1.6 million, which is an ongoing challenge to raise since 70% of the annual income needed must come from private philanthropic donations. This makes added capital projects beyond our ability to fully finance. So we would use AHTF funding to finance the bulk of this project with additional funding needed to complete it coming from charitable donations from private sources.

Leveraging/Matching Requirement:

$3 to $1 Leveraging: for every $1 allocated through the AHTF, at least $3 from other sources will be expected (leveraged funds can include long term mortgages, other sources of grants, owner equity, proceeds from Low Income Housing Tax Credits, or the current value of land); organizational resources should be used to provide $1 of match (See Exhibit A for example)

Briefly Describe:

St. Elizabeth will leverage the $372,338 value of the 9-unit Siringo property. Matching funds will come from $2,100 in direct contributions, as well as from staff costs to manage project, client rental assistance and the program's operating costs such as supportive services, maintenance, utilities, insurance, etc..

Project Budget and/or Development Pro-Forma: demonstrate use of leveraged and matching funds as well as evidence that operating budget is sufficient to administer the proposed program/project (please attach documents as well as give brief overview below)

Three construction bids for the project are enclosed with $65,940 being the lowest bid: this includes $63,840 for the bathroom renovations and $2,100 for grab-bar installations (projected 3/unit). The attached program budget and matching/leverage form provide specifics.

2. Need/Benefit & Project Feasibility:

Demonstrate, using data-based analysis, that there is a clear connection between the proposed project/program and adopted Priority(s), and evidence that the proposed project/program meets current and future market demands. Provide narrative below (use additional sheets as necessary):

The 8 apartments at Siringo are 100% occupied with a significant waiting list. As mentioned, most residents view this as their final home, and there is a great demand for this housing. Nationally, seniors comprise 31% of the homeless population and most have disabilities or permanent health problems often due to their long time spent living on the streets. Our residents reflect this reality. The Siringo program, with its on-site manager and supportive services, provides a safe and secure space to comfortably age in place. The renovated bathrooms will enable most residents to successfully remain living there into the forseable future if they wish.

What is the timeline for the project?

The renovation would start in summer 2017 once funding becomes available and completed by autumn. If the renovations make bathrooms temporarily unusable, the program manager will find alternative space with another resident or in his own unit for this short period.

Site Information (if applicable)

If your proposed project include acquisition, conversion, preservation and new construction of homeownership or rental housing, please provide the following information.

Site control is or will be in the form of*: ☐ Deed ☐ Option

☐ Lease (Term ____ Years) ☐ Purchase Contract ☐ Other (explain)

* If project is recommended for funding, proof of site control must be provided before funds are disbursed.

Expiration Date of Contract, Option, or Lease _____ (month/year)

Site Description:

Area of Site: _____ acres or _____square feet

Is site zoned for your development? ☐ Yes ☐ No Zoning_____

If no, is site currently in the process of re-zoning?

☐ Yes ☐ No Re-Zoning_____

When is zoning issue to be resolved? _____ (month/year)

Has the City approved the site plan and/or plat? ☐ Yes ☐ No

If yes, provide a copy of the site plan/plat.

Are there any other development reviews and approvals required? ☐ Yes ☐ No

If yes, explain:

_____

_____

_____

_____

List any required reports or studies underway or completed such as soils report, environmental assessment, traffic study)

_____

_____

_____

_____

Has the City issued the building permit? ☐ Yes ☐ No

Are all utilities presently available to the site? ☐ Yes ☐ No

If no, which utilities need to be brought to the site? _____

Who has responsibility of bringing utilities to site? _____

3. Affordability:

Outline the affordability time period for this project based on the following: (i.e. loans to $14,999 – 5 years, $15,000 to $40,000 – 10 years, 40,001-$100,000 – 15 years and over $100,000 – 20 years)

_____

_____

4. Demonstrated Capability - Organizational Capacity

Describe the expertise of your organization and past projects to provide the type of housing or programs proposed for funding:

St. Elizabeth Shelter has been in operation since 1986 providing homeless services for thousands of individuals. Our goal is to place our guests into permanent housing in the community or at our two permanent housing units, and we have more than a 60% success rate at doing so. We have administered several AHTF and CDBG projects in the past decade to renovate and maintain these units, and all have been completed on time with the current project still in construction. Our staff fully understands the various technical aspects and reporting requirements of these grants.

Describe your staffing and attach resumes of key personnel:

Deborah Tang, executive director, has held this position for 11 years and previously directed two domestic-violence shelters. Michael Bartlett, business manager who will oversee the project, also has been at St. Elizabeth for 11 years and during his tenure the organization has always had an unqualified audit with no irregularities or concerns. Sam Chavez has been program manager at Siringo for 11 years and receives high marks from the residents for his work and concern for their welfare. The program is a subcontractor on a City of Santa Fe Shelter + Care grant and has received favorable annual reviews for its performance and record-keeping.

Demonstrate Financial Soundness. Please submit the following documentation:

- Audited Financial Statements for 2015 and 2014.
- Current Statement of Assets & Liability

SUBMITTAL REQUIREMENTS

Please attach one (1) unbound copy of the following items in the following order:

X Audited Financial Statements for 2015 and 2014

X Current statement of Assets & Liability

X Project budget

X Leverage calculations

X List of current board members

X Fiscal Policies and Procedures

____Letter of compliance demonstrating cleared findings; or progress towards clearing findings

Southwest Plastering Co., Inc.

Michael A. Roybal • President • 2925 Rufina St., Santa Fe, NM 87507
License No. 058364 •Telephone (505) 438-6599 • Fax (505) 438-4247

To: St. Elizabeth Shelter

Email: director@steshelter.org
Phone: (505)982-6611

Job Site: Siringo
1905 Siringo Rd.
Santa Fe, NM 87505

Date: January 26, 2017

PROPOSAL/CONTRACT SPECIFICATIONS

General Description: Interior bathroom removal and replacement of bath tubs to shower stalls. Work to include the following:

1. Remove existing plumbing fixtures and fiberglass tub.
2. Clean up exiting floor and frame walls to except the installation of the new shower.
3. Install new rough-in plumbing for new fixtures.
4. Install new framing for pony wall and seat.
5. Install new cement board.
6. Install new shower pan.
7. Install water seal mastic over the cement board for the adhering of the new tile.
8. Install new tile, grout and seal.
9. Install new plumbing fixtures.
10. Install shower glass above the new pony wall/seat and glass door.
11. The existing toilet will be removed during this process and then the same toilet will be reinstalled.

12. New linoleum tile will be installed in the entire bathroom. This is because the existing linoleum is in bad condition and will be damaged even more during the new shower build. Average cost materials paid for by SWP.
13. Plumbing fixtures will be average cost Kohler brand paid for by SWP.
14. Tile will be average cost ceramic tiles pain for by SWP.
15. All Labor and material is included in this proposal.
16. Install strategically placed grab bars (*not included in total*) $87.50 per bar

Contract Total	**$7,980.00**
30% down	**$2,394.00**

Note: Price is for one unit.

OWNER / CONTRACTOR

Agree to pay billed incremental amounts based upon completed work. Agree to pay bills within ten working days of invoice receipt. Failure to pay will result in the additional charge of 2% per month of the unpaid balance plus attorney fees and the cost of collection of the unpaid balance.

SOUTHWEST PLASTERING

Southwest Plastering Company agrees to furnish all labor and materials for the completion of the specified work. All insurance's are provided by Southwest Plastering Company insurance plans. We will supply an outside toilet and maintain a clean work site area, as well as take care NOT to damage any plants, landscaping, and/or artwork. All windows and wood work is masked with either paper or plastic and kept clean. Proposal/Contract amounts not valid after 30 days.

Southwest Plastering Co. St. Elizabeth Shelter

Santa Fe Style Builders, LLC.
2925 Rufina St., Santa Fe, NM 87507 • License No. 92756
Telephone (505) 438-6138 • Fax (505) 438-4247

To: St. Elizabeth Shelter

Email: director@steshelter.org
Phone: (505)982-6611

Job Site: Siringo
1905 Siringo Rd.
Santa Fe, NM 87505

Date: January 26, 2017

PROPOSAL/CONTRACT SPECIFICATIONS

General Description: Bathroom Shower remodel

1. Demolition of existing bath tub.
2. Install new tile shower with seat and glass door unit.
3. Install new plumbing fixtures from Home Depot.

Contract Subtotal	$9,740.00
Tax (8.3125%)	809.64
Contract Total	**$10,549.64**
30% down	**$3,164.89**

Note: Price is for one unit.

OWNER / CONTRACTOR

Agree to pay billed incremental amounts based upon completed work. Agree to pay bills within ten working days of invoice receipt. Failure to pay will result in the additional charge of 2% per month of the unpaid balance plus attorney fees and the cost of collection of the unpaid balance.

SANTA FE STYLE BUILDERS

Santa Fe Style Builders agrees to furnish all labor and materials for the completion of the specified work. All insurance's are provided by Santa Fe Style Builders Company insurance plans.
We will supply an outside toilet and maintain a clean work site area, as well as take care NOT to damage any plants, landscaping, and/or artwork. All windows and wood work is masked with either paper or plastic and kept clean. Proposal/Contract amounts not valid after 30 days.

Santa Fe Style Builders, LLC.

St. Elizabeth Shelter

ATC
Construction, LLC
702 Don Felix St.
Santa Fe, NM 87501

Anthony Tapia
Lic. No. 81459

(505) 989-7053
(505) 690-3718

To: St. Elizabeth Shelter
1905 Siringo Road
Santa Fe, NM 87505

Date: January 26, 2017

Email: director@steshelter.org

PROPOSAL

Description: Tub and Shower Replacement

1. Remove tub and walls to replace tile.
2. Durock on walls for Tile
3. Shower pan with liner and curb
4. Tile replacement

A. ATC not responsible for plumbing.
B. Owner supplies tile.
C. ATC responsible for all other materials.

Price for one unit:

Subtotal	$8,650.00
Tax 8.3125%	719.03
Total	**$9,369.03**

Anthony Tapia

St. Elizabeth Shelter

Internal Revenue Service

Date: October 20, 2005

Department of the Treasury
P. O. Box 2508
Cincinnati, OH 45201

SAINT ELIZABETH SHELTER
CORPORATION
804 ALARID ST
SANTA FE NM 87505-3040 044

Person to Contact:
John C. Crawford 31-08343
Customer Service Representative
Toll Free Telephone Number:
877-829-5500
Fax Number:
513-263-3756
Federal Identification Number:
85-0347650

Dear Sir or Madam:

This is in response to your request of October 20, 2005, regarding your organization's tax-exempt status.

In August 1986 we issued a determination letter that recognized your organization as exempt from federal income tax. Our records indicate that your organization is currently exempt under section 501(c)(3) of the Internal Revenue Code.

Our records indicate that your organization is also classified as a public charity under sections 509(a)(1) and 170(b)(1)(A)(vi) of the Internal Revenue Code.

Our records indicate that contributions to your organization are deductible under section 170 of the Code, and that you are qualified to receive tax deductible bequests, devises, transfers or gifts under section 2055, 2106 or 2522 of the Internal Revenue Code.

If you have any questions, please call us at the telephone number shown in the heading of this letter.

Sincerely,

Janna K. Skufca

Janna K. Skufca, Director, TE/GE
Customer Account Services

Attorney General of New Mexico

Hector Balderas
Attorney General

Registry of Charitable Organizations
111 Lomas Blvd. NW, Suite 300
Albuquerque, NM 87102

(505) 222-9000
Fax: (505) 222-9006

NM Charitable Organization Registration Statement

Registration Tax Year
2015
Fiscal Year Period
7/1/2015 - 6/30/2016

Registration Status: **Registration Submitted**
Status Date: **January 12, 2017**
Registration Number: **20153831701234328**

Charity Name: **St. Elizabeth Shelter Corporation**
FEIN: **85-0347650**
Website Address: www.steshelter.org
E-Mail Address: info@steshelter.org
Fiscal Year End Month: 06 *Day:* 30
Incorporated: Yes *State:* NM *Date:* 2/10/1986
Organization Type:
Establish Date:

Other Names for Charity: No other names for charity.

Primary Address: 804 Alarid St.
Santa Fe, NM 87505

Mailing Address: 804 Alarid St.
Santa Fe, NM 87505

Other Addresses: *No Other Addresses*

Phone Numbers: 505-982-6611 (Telephone)
505-982-5347 (Fax)

NTEE Classifications: L41 Homeless Shelters

DEBORAH TANG

2186 Camino San Andres
Santa Fe, NM 87505

(505) 204-0422
S.S.# 468-64-5903
director@steshelter.org

Work Experience

Executive Director, St. Elizabeth Shelter **11/05 to present**
Supervise and manage all aspects of only year-round, full-service homeless shelter in Santa Fe and Northern New Mexico. It operates five separate facilities – two emergency shelters and three longer-term supportive housing units - and serves more than 2,000 people every year on a $1.45-million budget. *During my tenure, the organization* opened Casa Familia, an emergency shelter for single women and families, a medical respite program to care for homeless individuals too sick to live on the streets but not ill enough to be placed or remain in a hospital, a weekly Homeless Legal Clinic, and created a monthly Homeless Court in conjunction with Santa Fe Municipal Judge Ann Yalman.

Community Outreach Services Director, Open Hands **7/2005 to 11/2005**
Supervised all aspects of community outreach programs including CSBG allocation for rent, mortgage and utilities, home-safety modifications for disabled individuals and a medical-equipment loan bank.

Program Director, Empowering Our Communities in NM **3/2005 to 7/2005**
Created regional economic development plans for a project funded by US Department of Labor Workforce Investment Act.

Executive Director, Haven House **7/2003 to 3/2005**
Supervised all aspects of domestic violence shelter, including services and batterer intervention program serving Sandoval County. Worked with local, regional, state and national entities to enhance victim safety. Created 52-week offender program in collaboration with law enforcement, judges, community and probation and parole.

Executive Director, Navajo United Methodist Center **7/1998 to 10/2003**
Management of all program and organizational components for transitional living domestic violence shelter as well as summer work camp program. Responsible for staff and board administrative management, fundraising and public relations, facilities management program development and evaluation. Created numerous new programs including an organic community garden.

Executive Director, Start Up **2/1997 to 7/1998**
Management of entrepreneurship training and support program (micro-loans) in low income community of East Palo Alto, California. Program components included entrepreneurial training in Spanish and English, one-to-one business consulting and a loan fund. Established a community board, developed detailed operating and fundraising plans, created a graduate tracking system and engaged community participants including Stanford Graduate School of Business volunteers and Silicon Valley companies.

Loan Fund Administrator, WESST Corp **5/1995 to 2/1997**
Manager of statewide and City of Albuquerque micro-loan portfolio for low-income start-up businesses. Conducted entrepreneurial, budget and confidence-building trainings, outreach and follow-up support to loan fund applicants.

Research Investigator, Community Reinvestment Task Force (CREDIT) 1995-1996
Directed research and produced report on small business lending through surveys and focus group meetings in the Albuquerque Metropolitan Redevelopment (pocket of poverty) Areas

Education

Master's Degree – Community and Regional Planning – School of Architecture
University of New Mexico Graduated May, 1995

Master's Degree – Latin American Studies – Latin American Studies Dept.,
University of New Mexico Graduated May, 1995

Bachelor of Arts – Oregon State University
Major: Political Science **Minor**: Peace Studies Graduated May, 1991

Skills

Three years Spanish language training, 12 years accounting experience, multi-cultural education trainer, re-evaluation counselor. Adjunct faculty at San Juan College.

Professional Participation

Co-Chair and Secretary, New Mexico Coalition to End Homelessness (2003-2016)
Co-Chair, Coalition to Stop Violence against Native Women (2003 to 2006)
New Mexico Coalition Against Domestic Violence – member (1996-2005)
Santa Fe Affordable Housing Alliance- current member
Board Vice President, Empowering Our Communities in NM (2005)
Partnership Chair, San Juan County Partnership
President, Tres Rios Habitat for Humanity
Recipient, Oregon State Honors Program and Minority Achievement Scholarship

References

Elizabeth Reynolds
Director
Healthcare for the Homeless
(505) 988-1742
E_reynolds@lfmctr.org

Hank Hughes
Executive Director
New Mexico Coalition to End Homelessness
(505) 982-9000
Hank-H@nmceh.org

Michael W. Bartlett

23 Churchill Road Santa Fe, NM 87508

505.471.3650 Voice michael@coremichael.com

Resumé

3/99 to Present **Self Employed**

Business Consulting/Management and Accounting Services

Providing most of the services cited below to corporations, non-profit, and sole proprietorships. Companies in Santa Fe include: Santa Fe Stages (1999 through 2003), The Antiquities Shows (2000 to 2006) and St Elizabeth Shelter from 2005 to present.

6/96 to 3/99 **White Star Software, Incorporated**

Business Manager for software training, consulting and publication business

Direct reporting to corporate president. All aspects of A/R, A/P, P/R, & G/L utilizing QuickBooks accounting software. Manages 10 independent contractors in various contracting positions around the world. Contract negotiations with vendors in numerous countries. Magazine advertising and marketing brochure editing, layout and production. Semi-monthly newsletter and publication editing, layout and production. Sole signatory besides owners on checking accounts, taxes, and business contracts. Reconciliation and maintenance of 7 bank accounts. Website design, layout and maintenance.

10/90 to 6/96 **Golden State Audiology Associates, A Professional Corporation**

Business Manager for health related business with 8 offices and 27 employees

Direct reporting to corporate president. Supervised 25 employees. All aspects of A/R, A/P, P/R, & G/L utilizing Accpac accounting software. Interviewing, hiring, firing, training, reviewing, and disciplinary action of all employees. Newsprint, television and yellow page advertising layout and content. Overhaul and maintenance of employee manual. Sole signatory besides owner on checking accounts, taxes, and business contracts.

5/85 to 10/90 **Dragginwood and the Magic Crystals, Inc.**

Personnel and Office Manager for a retail business with two outlets

Direct reporting to corporate president. Supervised seven employees. Employee interviewing, hiring, training, and scheduling. Weekly deposits from both stores. P/R and A/P. Inventory control and budget as prescribed by projections, disbursements, and monthly income. Layout, design, and content of radio and print advertising. Purchasing agent. Retail sales. Creation of window and floor displays. Catalogue initiation, organization, layout, and production. Primarily responsible to maintain and manage business for an absentee owner. I continued doing the accounting for this business until 2007.

1983-1989 **Patricia Miller, D.D.S. and Anthony Viola, D.D.S.**

Dental Assistant and General Bookkeeping

Direct reporting to owners. Safeguard system of accounting. A/R and collections. Daily deposits. Insurance and patient billing. General chairside assisting. Originally full-time, then part-time/on call.

References available upon request

Samuel Chavez
1905 Siringo Road
Santa Fe, NM 87505
505-577-7518
schavez99@ hotmail.com

Work Experience

2005 – Present

Program Manger, Siringo Senior Supportive Living Program
St. Elizabeth Shelter

Direct permanent supportive housing program for formerly homeless seniors in 8-apartment complex near Santa Fe High School. Provide case management, counseling, life skills and other needed services to program residents, all of whom have a disability. Provide referrals, as appropriate, for residents to other community agencies specializing in the services needed such as physical or mental health, alcohol and/or substance abuse. Help residents attain entitled benefits. Enter all resident's demographic information in HUD's HMIS nationwide data system. Maintain documentation for program's Shelter + Care grant through City of Santa Fe. Provide many other duties as needed such as transportation, shopping, building maintenance, etc.

2016 – Present

Third Grade Teacher
Santa Fe Public Schools

Provide classroom instruction for third graders, prepare testing and grading, provide age-appropriate socialization skills and monitor behavior.

2002 – 2016

Third Grade Teacher
Española Public Schools

Provide classroom instruction for third graders, prepare testing and grading, provide age-appropriate socialization skills and monitor behavior.

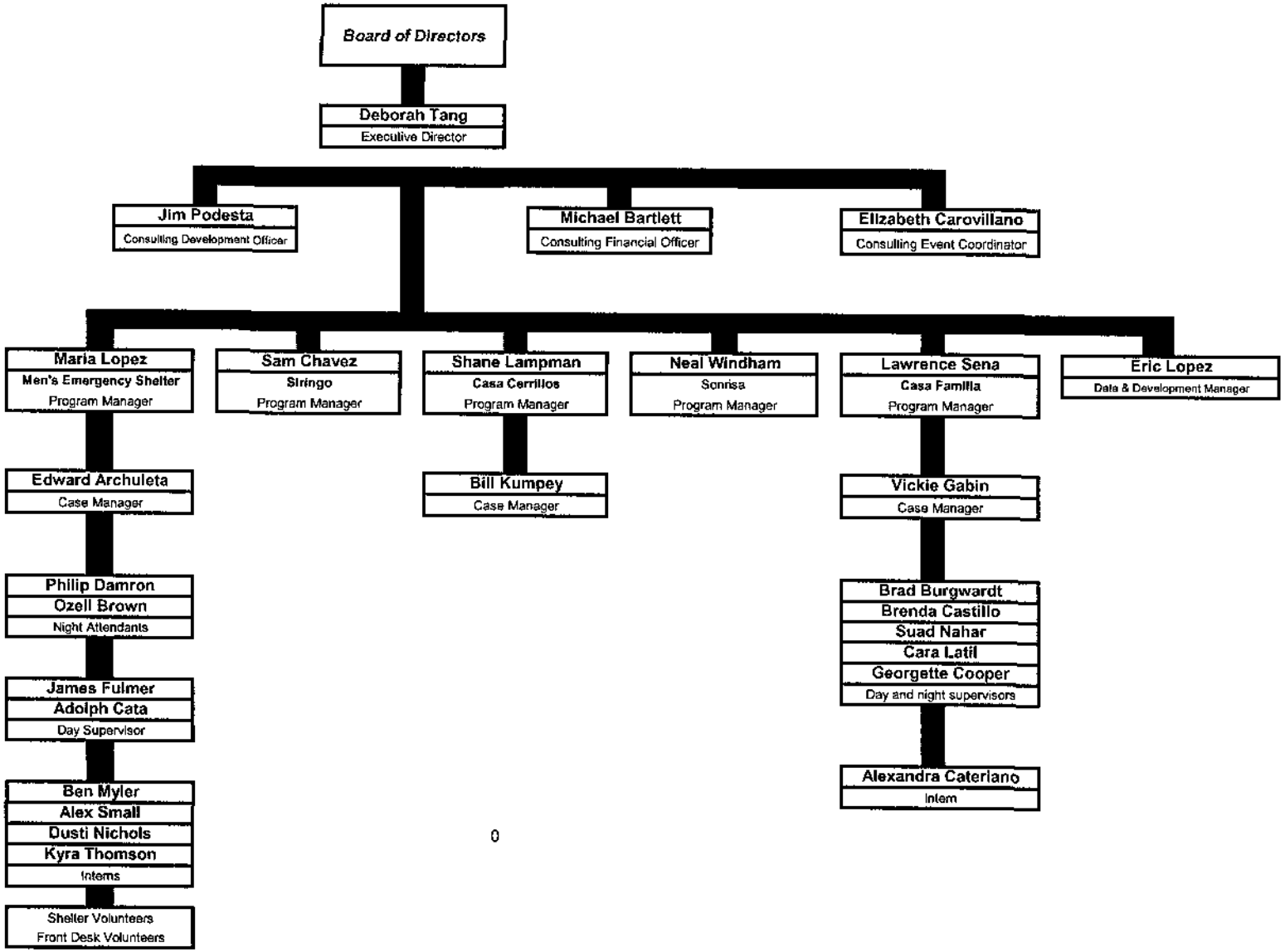
Education

2001

B.A. Education, College of Santa Fe

St. Elizabeth Shelter Organizational Chart

Revised: 1/27/17



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CITY OF SANTA FE
COMMUNITY DEVELOPMENT BLOCK GRANT (CDBG)
PROPOSAL SCORE SHEET / Bid Number '17/22/RFP

Name of Applicant/Project: YouthWorks · Facility - (CDBG)

Amount Requested: $ 65,000.00

Evaluation Criteria	Weighted Value	Evaluation Points 1 thru 5	Total Score	Max Score
Activity to be funded • Why needed? Does it address a gap? • Steps/phases to complete the activity • Who is served? • #s proposed to be served	20	X 4	80	100
National Objective Compliance • Benefits low/moderate income persons/households? • Prevents slum/blight • Does the activity serve residents Citywide or a Low to Moderate Income (LMI) Area (i.e. Census Tract)?	20	X 5	100	100
Consolidated Plan Compliance • Does the application demonstrate that it meets Consolidated Plan priorities?	10	X 4	40	50
Budget • Is proposed budget realistic? • Are other funding sources secured?	10	X 3	30	50
Performance Measurement/Work Plan • Are performance measurements, outcomes and proposed outcomes well presented? Realistic? Well-supported in the application? • Does the applicant have the administrative capacity to carry out the activity to be funded?	20	X 4	80	100
		Total Points	330	**400**

CDC Evaluator Name

Signature

02/14/17
Date

CITY OF SANTA FE (CSF)
NON-DISCLOSURE AND CONFLICT OF INTEREST STATEMENT

REQUEST FOR PROPOSAL #'17/28/P

EVALUATOR NAME: John A. Padilla

CSF policy is to prevent personal or organizational conflict of interest, or the appearance of such conflict of interest, in the award and administration of CSF contracts and Purchase Orders.

I, John A. Padilla, the undersigned, hereby certify that the following statements are true and correct and that I understand and agree to be bound by commitments contained herein.

I am acting at the request of CSF as a participant in the evaluation of *offers/ proposals* received in response to the *Request for Offers/ Request for Proposals,* entitled and/ or numbered I am acting of my own accord and not acting under duress. I am not currently employed by, nor am I receiving any compensation from, nor have I been the recipient of any present or future economic opportunity, employment, gift, loan, gratuity, special discount, trip, favor, or service in connection with any *offer/ proposal* or involved *Offeror/Proposer* in return for favorable consideration. I have no preconceived position on the relative merits of any of the *offers/ proposals* nor have I established a personal preference or position on the worth or standing of *any Offeror/ Proposer* participating in this action. CSF policy is to prevent personal or organizational conflict of interest, or the appearance of such conflict of interest, in the award and administration of CSF contracts, including, but not limited to contracts for professional services, agreements with consultants and Purchase Orders.

I hereby certify that to the best of my knowledge and belief, no conflict of interest exists that may diminish my capacity to perform an impartial, technically sound, objective review of this proposal(s) or otherwise result in a biased opinion or unfair competitive advantage.
I agree not to disclose or otherwise divulge any information pertaining to the contents, status, or ranking of any *offer/ proposal* to anyone other than the team leader or other evaluation team members. I understand the terms and "disclose or otherwise divulge" to include, but are not limited to, reproduction of any part or any portion of any *offer/ proposal,* or removal of same from designated areas without prior authorization from the evaluation team leader. I agree to perform any and all evaluations of said *offers/ proposals* in an unbiased manner, to the best of my ability, and with the best interest of CSF paramount in all decisions.
I agree to return to CSF Purchasing Department all copies of proposals, as well as any abstracts, upon completion of the evaluation!

04/14/17

SIGNATURE AND DATE:

Cover Page

City of Santa Fe Community Development Block Grant Program FY 2017-2018	
Name of Nonprofit Organization:	YouthWorks
Name of Executive Director:	Melynn Schuyler
Name of Board President:	Laine Renfro
Name, Contact Information (Address, Phone, and Email) of Person Submitting Request (Fiscal Agent if appropriate):	Melynn Schuyler, Executive Director YouthWorks 1000 Cordova Pl., #415 Santa Fe, NM 87505 505-989-1855, melynn@santafeyouthworks.org
Amount Requested:	$65,000.00
Program Name or Service being requested for Funding:	*Energy Efficiency & Health and Hygiene Facility* Upgrades: Solar Panel System and Private Youth Shower Room Installation

Brief Program or Service Description: CDBG funding is requested to meet the 1) Final phase of a multi-year energy efficiency facility upgrade plan and 2) to assist with the installation of a private shower room for participant use to meet health and hygiene needs in YouthWorks Workforce Development and Alternative Education Center. Project 1) A photovoltaic solar panel system installation is the last recommended upgrade for facility energy efficiency. Solar panel system installation will save nearly $3,000 a year in energy costs and will lower our ecological impact. Youth participants will be actively engaged in workshops with solar professionals to gain knowledge about the installation and use of solar for energy efficiency, and clean renewable energy. Project 2) Additionally, YouthWorks plans to install a much-needed private shower room in the facility to address youth participant' hygiene and health needs. Due to the rising numbers of youth and young adults facing housing insecurity that seek services at YouthWorks, the addition of a shower will improve workforce and education readiness as youth strive to reach their education and work goals.

Check which Category Describes your organization:

8. Private Non-Profit **X**
9. For Profit
10. Public Agency
11. Government Agency

DUNS or CAGE #	1337700532
Business Registration #	17-00091367
Tax ID #	85-0480524
State CRS #	02-471161-00-6

Check One: **X** Previous Recipient
☐ New Applicant

Funding Categories to be Addressed (Circle one):

☐ Housing
X Public Facility
☐ Public Service

Project Proposal Summary
(If funded, the following will be written into the contract Scope of Services with Accomplishment Levels along with details provided in Section A)

Activity Name	Energy Efficiency & Health and Hygiene Facility Upgrades : Solar Panel System and Private Youth Shower Room Installation
Brief Summary of the activity	

1. Installation of approximately 37 solar panels to reduce annual electricity bills by 96% at the current utility rate in the first year, replacing facility utility use with clean, renewable energy. Savings will grow as electric utility rates are expected to rise 5.00% a year.
2. Installation of a private shower room at YouthWorks Education and Training facility to enable access to health and hygiene for youth participants that face housing insecurity and homelessness.

Amount of CDBG funding requested for Activity	**$ 65,000.00**
Total budget of Activity	**$ 74,500.00**

To the best of my knowledge and belief, all data in this application is true and correct. If funded, I certify that the Applicant Organization is willing and able to adhere to the policies and procedures specified by the City of Santa Fe and all applicable program regulations of the US Department of Housing and Urban Development. Further, I understand there is not an agreement until the City of Santa Fe and the individual authorized to execute contracts on behalf of the Applicant Organization has signed the contract.

Authorized Signature *(sign in blue ink)* | Executive Director Title | 01/31/17 Date

CDBG funds can be used for specific Eligible Activities as outlined in the Overview. Select one type of Eligible Activity category that best describes your Project.

Type of Eligible Activity (check one)

Activities Related to Housing	
Other Real Property Activities	
Public Facilities/Improvements	X
Public Service	

Section A: Activity to be funded

A.1 Briefly describe the Activity you are requesting to fund with CDBG. This will help determine eligibility.

YouthWorks is requesting $65,000.00 to fund two nonprofit facility improvement projects.

YouthWorks proposes to install 37 solar panels on the nonprofit facility at 1504-1506 Cerrillos Road, Santa Fe, NM. The facility houses the YouthWorks Workforce Development and Alternative Education Center that serves over 1,200 youth and young adults per year. The installation of a photovoltaic solar panel system will complete the final phase of energy efficiency retrofits as called for by an independent DOE-certified energy audit completed 1/3/2014. YouthWorks has just completed, January 2017, a roof replacement project that improved insulation and energy efficiency and removed a very old dilapidated roof on the facility, and is now ready for solar panel system installation. The addition of the solar panels will save approximately $2,666 annually in the first year and will enable YouthWorks to use clean, renewable energy going forward in a sustainable manner for the future. Additional annual saving is expected as utility rates rise at an estimated rate of 5% a year. Concurrently, youth participants (20), will receive instruction by solar professionals in the installation and use of solar as a renewable energy source as a workforce training initiative and opportunity.

YouthWorks, as a nonprofit community-serving education and training center, has for years encountered a rising number of youth and young adults facing housing insecurity and homelessness. The needs are great, and in a concerted effort to assist participants seeking education and workforce attainment YouthWorks has determined that a simple facility adaptation/improvement can assist to facilitate job and career readiness. The addition of a private shower room at YouthWorks will improve the facility for participants needing assistance with health and hygiene as youth strive to reach their education and/or work goals and life stability.

A.2 Why is this Activity needed? Does it address a gap? Describe the degree of need, or the severity of a problem including cause, extent, location, frequency and duration that will be addressed by the project. Provide a description of service gaps the activity fills in the community. Additionally, supply data, such as demographics, reports and/or other information supporting your information and proving the need exists. **(Attach additional pages, if necessary)**

YouthWorks currently spends nearly $3,000 a year on utilities. Our 4,400 square foot nonprofit facility purchased in 2011, was originally built in the 1960's as two separate commercial units, had poorly designed heating and cooling which worked far below normal efficiency. In early 2014, YouthWorks had an energy audit conducted by an independent DOE-certified auditor. That audit identified a series of improvements and retrofits needed to improve energy efficiency and save utility costs while improving air quality and lowering our ecological impact. CDBG funds provided funding to complete the Phase I and II improvements identified in the Energy Audit. At the beginning of Phase I, YouthWorks energy costs were nearly $5,000 annually. Phase II has just been completed in January 2017, with a full roof tear-off of a dilapidated leaky roof, replaced with a new roof with utilizing state of the art insulating materials for energy efficiency. The Final Phase to install a solar panel system will further reduce electric cost by 96% in the first year, as

determined by solar professionals through three separate proposed bids, and allow YouthWorks to use clean, renewable energy.

This project offers a unique opportunity to lower operational overhead costs of this publicly-used facility, increase the sustainability of the organization, lower our impact on the environment, and deliver a viable plan for future facility operations through the use of clean energy. Furthermore, by engaging youth enrolled in YouthWorks construction-training workforce development program in concurrent solar energy-use workshops and instruction, youth will also receive training from solar professionals regarding solar energy benefits and workforce career training needed to enter this alternative energy field. We will lower costs and provide a rare opportunity for real-world energy efficiency retrofit training. Ultimately, these investments in energy efficiency will also serve as a permanent teaching tool for future YouthWorks construction training cohorts.

YouthWorks is measuring an increase in the numbers of youth and young adults facing housing insecurity and homelessness. The addition of a private participant shower at YouthWorks will address health and hygiene needs and improve workforce and education readiness as youth strive to reach their education and/or work goals which will ultimately assist to alleviate their precarious housing issues.

In January of 2017, in an effort to address the conditions for youth and young adults facing homelessness The Collaborative Shelter Working Group (CSWG), comprised of representatives from YouthWorks ,SFPS Adelante Program, Youth Shelters and Family Services (YSFS) Transitional Living Program, YSFS Street Outreach, Santa Fe Birth to Career Collaborative sponsored by SF Community Foundation and concerned community members launched and emergency shelter, named ShelterNow!, a shelter for young adults ages 18-24. The shelter is currently housed a various Interfaith Council churches and rotates to a new congregation facility each week. CSWG members are working to wrap additional services around each youth that presents need for housing. Case management needs of youth include food, clothing, hygiene, legal and benefits assistance, education and workforce training and job placement assistance. ShelterNow! can accommodate 25 young adults per night, and has raised emergency funding to operate approximately 12 weeks. At this time YSFS Street Outreach is the only facility available for showering and hygiene, and for those up to age 22 only. YouthWorks is requesting CDBG funding to install a private shower room at the YouthWorks Workforce Development and Alternative Education Center to meet further community-need, the project will remodel an existing space within the facility that has plumbing access.

(See attached US DOE Certified Energy Audit and Monthly Energy Consumption Data)

A.3 If applicable, what steps or phases will be taken to complete the Activity (provision of services, engineering/design, advertising, bidding, contract award, construction, etc.)?

The photovoltaic solar panel system project will commence with retaining a qualified full service design-build solar company. Three bids have been received from local solar installation companies. The company awarded the bid will be responsible for design, permitting, and installation. The solar installation company will also work with YouthWorks construction manager and educational staff to involve youth in instructional projects that demonstrate the trades' knowledge, energy usage and renewable energy systems that solar panels utilize. YouthWorks will utilize only GB-98 general

contracting licensed professionals to manage the shower installation project and to coordinate the plumbing subcontractor and build-out requirements. Companies chosen for both projects will optimally be thoroughly familiar with the specific crosscutting federal requirements triggered by CDBG funding including the Davis-Bacon Labor Standards, Section 3 Equal Opportunity and procurement requirements as well as City of Santa Fe Code and building permits.

A.4 Describe the population that the Activity will serve and how this population will be served. Describe the outreach and recruitment activities which will be conducted to make the proposed activity services known and accessible to the targeted population. Please include where these outreach and recruitment activities will take place.

Of the 1,200 youth YouthWorks engages each year, more than 350 fully participate in all of YouthWorks services over the course of the year, taking advantage of our full suite of education, job *training, and job placement services.* YouthWorks serves youth and young adults from Northern New Mexico with the majority from Santa Fe County. YouthWorks has a broad referral network and uses social media to inform youth of our services. But, the "youth to youth" is our best referral network. YouthWorks service population is unique among Santa Fe non-profits. Our program participants range from age 14 to 24. Typical demographics of our service population are 90% Hispanic, 97% low-income, 35% with some form of disability, 60% homeless or housing insecure during the cold weather months and 20% in the summer season, and 24% female headed households. These youth have literally no other place to turn for support and assistance. Many have been involved with the criminal justice system and have dropped out, or been forced out of public school. Because of their backgrounds, nearly all lack other meaningful opportunities for education, job training and basic life supports.

A.5 Estimate the number of total persons / households that will benefit from the CDBG funded portion of this Activity: (Fill in Households OR Persons depending on the type of Activity you are providing).

Total number of clients you anticipate serving:		
Households:	**OR**	Persons: 500

A.6 Use the following Table 1 to break out the number of persons you anticipate serving at the low (30-50% AMI) and very low-income (< 30% AMI) levels and the type of client (Refer to overview of CDBG program for the most recent income amounts). Along with income, please anticipate the number of clients that are severely disabled adults, homeless persons, abused children, battered spouses, and illiterate adults, persons with AIDS, migrant farm workers, and elderly. (All of these clients fall under the presumed benefit categories as defined by CDBG and therefore, all under low or extremely low income). This would apply mainly to Public Service or Public Facilities/Improvements Activities.

Extremely Low Income (<30% AMI)	Low Income (31-50%)	Moderate Income 51-80%	Illiterate adults	Abused children	Severely Disabled Persons	Migrant Farm Workers	Elderly	Persons with AIDS	Homeless Persons
200	300		125	240	30				250

Table 1

A.7 Use the following Table 2 to breakout the number of households you <u>anticipate</u> serving at the income levels listed. (Refer to the 2016 AMI table on pg. 18 for the most recent income amounts). This would apply mainly to CDBG funding for housing projects such as Down Payment Assistance and Rehabilitation Activities.

Extremely Low Income (<30% AMI)	Low Income (31-50%)	Moderate Income (51-80%)	Non-low Moderate Income (81-100%)	Female Head of Household

Table 2

A.8 CDBG funded construction activities must be in compliance with local land use plans and zoning. Explain how the proposed activity conforms to local plans and zoning ordinances. Provide a copy of the page(s) of resource document(s), pertinent sections, and page(s). This only applies to projects where the CDBG funds will used for the actual construction, not acquisition.

This project does not include a change of use from currently allowed zoning. All construction permits will be obtained through the city. This activity directly supports stated goals of the Sustainable Santa Fe Plan, including strategy 5.1 reducing Santa Fe's demand for energy and strategy 5.5 establishing a loan fund for energy efficiency retrofits.

A.9 Please describe the organization in terms of its administrative capacity and its qualifying experience and length of experience with activities or projects similar to the proposed Activity. Include purpose, goals, programs, activities, clients, and accomplishments, if any, in the area of activity for which funding is requested. Give examples of and list experience.

YouthWorks was formed in 2001 to address the lack of meaningful alternative education and employment opportunities for disconnected youth in Santa Fe, while also providing harm prevention

education and counseling services to the large numbers of youth in need. The organization began by launching education and employment training through the creation of the Santa Fe Youth Corps program, with funding by the NM Youth Conservation Corps. This was coupled with Life Skills Training and Counseling for youth in the Santa Fe Public Schools through partnership with the School District and the City of Santa Fe. YouthWorks has grown since its inception to have many partners and create many collaborations in the community and statewide. Since 2001, YouthWorks has served thousands of youth while expanding youth development opportunities that include high impact interventions, youth advocacy, alternative education, leadership training and employment connections for youth and young adults, critically improving the health of the community and the positive youth outcomes. In a given year the organization regularly oversees more than 20 contracts and grants on the local, state, and federal level, as well as managing over 300-500 youth student/trainee/employees.

A.10 Briefly describe your organizations experience in government contract administration, and knowledge of federal regulations governing acquisition, procurement, equal employment opportunity, and laborstandards.

YouthWorks has a 15-year history of effectively managing multiple contracts from the City of Santa Fe, the State of New Mexico, as well as the federal government, including a reporting and monitoring-intensive YouthBuild program funded through the Department of Labor Employment and Training Administration. The organization has existing comprehensive record keeping, reporting and monitoring structures in place for these programs and do not anticipate having to increase any of the aspects of program administration for this new program. Our accountant and bookkeeper has direct experience with Davis-Bacon Labor Standards requirements and reporting and is prepared to ensure that this project is conducted with full compliance. YouthWorks has consistently received clean financial audits with no findings, demonstrating the organization's strong management and sound fiscal oversight.

B. National Objective Compliance

1. Benefits Low/ Moderate Income persons/households by:	
Area Benefit (eligible area) (LMA)	X
Limited Clientele (LMC)	
Housing Activities (LMH)	
Job Creation or Retention (LMJ)	

B.2 Is the service area city wide: (X) yes ( )no If no, fill out B.3.

B.3 If an activity is based on an area benefit, identify the Census Tract(s) and Block Group(s) that will be served. Make sure to read the Overview for a clear understanding of the requirements of an area benefit. Attach a map of the area.

Census Tract	Block Group	Total Population	Low/Mod Income Population	% Low/ Mod Income
10.02				69.75%*
Total				

***verified in EGIS CPD Mapping Tool, population information not available.**

B.4 Explain fully how the proposed project meets the CDBG National Objective selected above. Provide substantiating documentation supporting the claims. Refer to Overview for more detail.

This project meets the CDBG National Objective by providing a public service based on an area benefit to a majority low and moderate-income (LMI) census tract. YouthWorks activities qualify as a public service because they are open and available to the public during regular business hours, and are a qualified 501(c)3 non-profit charitable organization. The YouthWorks facility is located in Census Tract 10.02 which is 69.75% LMI based on a search of eligible LMI census tracts in the HUD CPD Mapping Tool database. Furthermore, the proposed activities qualify as an eligible activity under the CDBG category of "Public Facilities and Improvements" which "may include design features that promote energy efficiency and architectural design features and treatments intended to enhance aesthetic qualities of facilities".

C. Consolidated Plan Compliance

The City of Santa Fe provides guidance in its 2013-2017 Consolidated Plan on funding uses, whether Federal, State, City, or Private. In accordance with federal regulations, each project must be consistent with the priorities outlined in the City's Consolidated Plan. (See Consolidated Plan on City website) Mark the **one priority** that the proposed project will meet.

P-25 Priority Needs

Check	Priority Need Name	Priority Level	Population Served	Goals Addressed
	Rental Vouchers	High	Extremely low-income renters; people at risk of being homeless; persons with disabilities; homeless youth; veterans; elderly; families in transition; persons with HIV/AIDS and their families; public housing residents; mentally ill; chronic substance abusers; victims of domestic violence	Reduced rate of cost burden and corresponding drop in poverty rate for homeless households and those in danger of becoming homeless. *(Increase Opportunities for At Risk Populations);* Inventory of rental units and vouchers expanded to meet increased demand *(Increase Affordable Housing Opportunities)*
	Emergency Shelter (note could be classified as Public Service which is restricted in allocation amount)	High	Extremely low-income residents; chronic homeless; homeless youth; veterans; families in transition; mentally ill; chronic substance abusers; victims of domestic violence	Reduced rate of cost burden and corresponding drop in poverty rate for homeless households and those in danger of becoming homeless. *(Increase Opportunities for At Risk Populations)*
	Support Services for Homeless or People at Risk of Homelessness (note could be classified as Public Service which is restricted in allocation amount)	High	Extremely low-income renters; people at risk of being homeless; persons with disabilities; homeless youth; veterans; elderly; families in transition; persons with HIV/AIDS and their families; public housing residents; mentally ill; chronic substance abusers; victims of domestic violence	Reduced rate of cost burden and corresponding drop in poverty rate for homeless households and those in danger of becoming homeless. *(Increase Opportunities for At Risk Populations)*
	Refinancing Services and Support for Current Homeowners	High	Low-income homeowners; homeowners in risk of foreclosure; homeowners in substandard housing	Reduced rate of cost burden and corresponding drop in poverty rate for homeless households and those in danger of becoming homeless. *(Increase Opportunities for At Risk Populations);* Increased homeownership opportunities and support for long term affordability and accessibility for current homeowners. *(Increase Affordable Housing Opportunities)*

Priority Needs (cont.)

Check	Priority Need Name	Priority Level	Population Served	Goals Addressed
	Homeowner Rehabilitation Programs, Energy-efficiency Upgrades, Accessibility Retrofits	High	Low- and moderate-income homeowners; residents in redeveloping or transitioning neighborhoods; homeowners living in aging or substandard housing stock; seniors who need to "age in place;" people with disabilities	Increased homeownership opportunities and support for long term affordability and accessibility for current homeowners. *(Increase Affordable Housing Opportunities);* Housing opportunities reflect emerging needs, changing demographics and are aligned with redevelopment projects, economic development objectives and sustainability goals *(Address Emerging and Current Needs and Changing Demographics)*
	Construction of affordably-priced homes for homeownership	Low	Low- and moderate-income homebuyers and current renters; local workforce	Increased homeownership opportunities and support for long term affordability and accessibility for current homeowners. *(Increase Affordable Housing Opportunities)*
	Fair Housing Outreach	High	Low- and moderate-income renters; low-income landlords; persons with disabilities; Spanish speakers; large families; general public	Housing opportunities reflect emerging needs, changing demographics and are aligned with redevelopment projects, economic development objectives and sustainability goals *(Address Emerging and Current Needs and Changing Demographics)*
	Diversity of Housing Types	Low	Low- and moderate-income renters; seniors; small households; entrepreneurs; aging veterans; entrepreneurs and other self-employed	Housing opportunities reflect emerging needs, changing demographics and are aligned with redevelopment projects, economic development objectives and sustainability goals *(Address Emerging and Current Needs and Changing Demographics)*
X	Non-Housing Community Facilities and Services	High	Low- and moderate-income residents; residents in redeveloping or transitioning neighborhoods; youth	Housing opportunities reflect emerging needs, changing demographics and are aligned with redevelopment projects, economic development objectives and sustainability goals *(Address Emerging and Current Needs and Changing Demographics)*

Priority Needs (cont.)

Check	Priority Need Name	Priority Level	Population Served	Goals Addressed
	Provision of Rental Units and Support Services for LI/ VLI Renters	High	Low- and very low-income renters; persons transitioning out of homelessness; renters in need of support services; public housing residents	Inventory of rental units and vouchers expanded to meet increased demand *(Increase Affordable Housing Opportunities);* Housing opportunities reflect emerging needs, changing demographics and are aligned with redevelopment projects, economic development objectives and sustainability goals *(Address Emerging and Current Needs and Changing Demographics)*
	Rental Rehabilitation	Low	Low- and moderate-income renters; low-income landlords; residents of low- income neighborhoods that are redeveloping or in transition; public housing residents	Inventory of rental units and vouchers expanded to meet increased demand *(Increase Affordable Housing Opportunities);* Housing opportunities reflect emerging needs, changing demographics and are aligned with redevelopment projects, economic development objectives and sustainability goals *(Address Emerging and Current Needs and Changing Demographics)*
	Down Payment Assistance	High	Low- and moderate-income residents who are "buyer ready"; first responders (fire, police, etc.)	Increased homeownership opportunities and support for long term affordability and accessibility for current homeowners. *(Increase Affordable Housing Opportunities)*
	Homebuyer Training & Counseling	High	Low- and moderate-income homebuyers; current renters	Increased homeownership opportunities and support for long term affordability and accessibility for current homeowners. *(Increase Affordable Housing Opportunities)*

D. Budget

D1. Describe the Proposed Budget for this Activity. Please explain all budgeted expenses including contractual services, personnel services, commodities, and capital outlay. Also explain what the CDBG funds will be used for. Also explain the effect of not receiving any or only a portion of a CDBG allocation has on the project budget.
See Attached Budget.

The requested budget is based on professional estimates of cost as outlined in the attached budget. These are not-to-exceed numbers and we hope to come in under budget, but given the applicability of Davis-Bacon Labor Standards and the potential for higher wages and costs associated with this requirement, we feel the established numbers are appropriate. All funding is for materials or contractors and no funding will be used for YouthWorks staff.

All energy efficiency retrofits are based on a sequential upgrade plan which prioritizes the highest return for investment energy savings. If less than complete funding is received we will undertake projects in order of priority.

Please complete the following table to identify the funding sources and amounts. Indicate total project cost that incorporates the total CDBG request and what funds or services, if any, the sponsor and/or other agencies will contribute. Also enter other ***committed*** funding sources (committed funds are funds available or will be available to fund the Activity during the CDBG Fiscal Year). Please be as accurate as possible. Should your organization be awarded funding, a revised budget (as needed) will become an Addendum to the CDBG Contract.

Type of funding	Source/ amount	Source/ amount	Source/ amount	Totals
Requested CDBG amount				**$65,000**
Other HUD funds i.e. HOME, Section 108				**$**
Other Federal Funds				**$**
City Funding i.e. Youth and Family, Human Services	City Youth and Family $4,000			**$ 4,000**
State funding, i.e. MFA				**$**
Other i.e. in- kind, private funds	private			**$ 5,500**
Total of all funding sources				**$ 74,500**

D.2 If you are proposing to utilize CDBG funds to pay for staff costs, please list each position title and the percentage of their salary and benefits that will be funded by CDBG. Depending on the Activity, listing this information does not guarantee the position will be funded by CDBG as it may not be eligible.

PERSONNEL Position Title	**New (Y/N)**	**% salary & benefits paid for with CDBG**
NA		

E. Performance Measurement System/Work Plan

CDBG/ Work Plan - FY 2017-2018

Provide the performance measurement goals, objectives and outcomes for your proposed CDBG project. Please refer to Exhibit B at the end of this document. Based on these measurements, attach a Work Plan that describes the goals, objectives and outcomes in greater detail and be:

(B) Specific
(C) Measurable
(D) Achievable
(E) *Results-orientated*
(F) Time bound

YouthWorks Energy Efficiency & Health and Hygiene Facility Upgrades: Solar Panel System and Private Youth Shower Room Installation

Work Plan

YouthWorks Energy Efficiency installation of solar panels and sanitation upgrade by installation of a shower at the YouthWorks Office and Education/Training facility will meet these specific, measurable, achievable, results-based objectives by delivering the program these steps according to this projected timeline:

Review bids from solar and general contractors (three each)	July 10, 2017
Hire General Contractor to complete shower installation and begin permit process	July 15, 2017
Subcontractors secured	August 1, 2017
Construction on shower begins	August 15, 2017
Complete shower installation	September 1, 2017
Hire Solar Contractor	September 1, 2015
Solar Contractor meets with YouthWorks Construction Manager to set schedule for youth education and training on solar installation	September 15, 2015
Complete Solar training and installation	January 30, 2018
Classroom training and projects on analysis of solar panel benefits to YouthWorks energy usage and utility cost savings	May 30, 2018

EXHIBIT A: Project Budget Addendum for YouthWorks – Energy Efficiency & Health and Hygiene Facility Upgrades: Solar Panel System and Private Youth Shower Room Installation

Per Section V.B. of the Professional Services Agreement and per 24 CFR 570.503(b)(1).

Type of funding	Source/ Amount	Source/ Amount	Source/ Amount	Totals
Final CDBG AMOUNT				**$ 65,000.**
Other HUD funds (i.e. HOME, Section 8)				**$**
Other Federal Funds				**$**
City Funding (i.e. Youth and Family, Human Services Divisions)	City Youth and Family - $4,000			**$ 4,000.**
State funds (i.e. MFA)				**$**
Other (i.e. in-kind, private funds)	Private funds for admin & teaching support-$5,500			**$ 5,500.**
Total of all funding sources				**$ 74,500.**

The following chart details how the secured funding amount will support the various aspects of YouthWorks – Energy Efficiency & Health and Hygiene Facility Upgrades: Solar Panel System and Private Youth Shower Room Installation

Cost	CDBG Allocation
Solar Panels - $59,400	$65,000.
Shower - $5,600	
Cost	Private Leveraged Funds
Private funds - $5,500	
City Youth & Family grant - $4,000	
Total : $74,500	

CITY OF SANTA FE
COMMUNITY DEVELOPMENT BLOCK GRANT (CDBG)
PROPOSAL SCORE SHEET / Bid Number '17/22/RFP

Name of Applicant/Project: YouthWorks

Amount Requested: $ 65,000.00

Evaluation Criteria	Weighted Value	Evaluation Points 1 thru 5	Total Score	Max Score
Activity to be funded • Why needed? Does it address a gap? • Steps/phases to complete the activity • Who is served? • #s proposed to be served	20	X _____	_____	100
National Objective Compliance • Benefits low/moderate income persons/households? • Prevents slum/blight • Does the activity serve residents Citywide or a Low to Moderate Income (LMI) Area (i.e. Census Tract)?	20	X _____	_____	100
Consolidated Plan Compliance • Does the application demonstrate that it meets Consolidated Plan priorities?	10	X _____	_____	50
Budget • Is proposed budget realistic? • Are other funding sources secured?	10	X _____	_____	50
Performance Measurement/Work Plan • Are performance measurements, outcomes and proposed outcomes well presented? Realistic? Well-supported in the application? • Does the applicant have the administrative capacity to carry out the activity to be funded?	20	X _____	_____	100
		Total Points		**400**

F. Submittal Requirements: Required Attachments

Please attach one (1) unbound copy of the following items <u>in the following order:</u>

_X_ Transmittal Letter

_X_ On your organization's letterhead, prepare a brief letter outlining the following:
- A brief summary of your proposed project;
- Funding amount requested; and
- Name, telephone number and address of a contact person(s)

_X_ Board of Directors' Authorization to Request Funds

_X_ Work Plan (as noted above)

_X_ Certificate of Non-profit Incorporation

_X_ IRS documentation showing qualification as a nonprofit corporation under Section 501(c) (3), and most recently submitted Federal Tax Return (Form 990 or 990EZ) or other financial statement.

_X_ Organization Chart

_X_ Copy of Agency's most Recent Independent Audit

_X_ Agency's accounting and procurement policies

_X_ Confidentiality and Disclosure of Information

_X_ US DOE Certified Energy Audit and Monthly Energy Consumption Data

CITY OF SANTA FE
AFFORDABLE HOUSING TRUST FUND (AHTF)
PROPOSAL SCORE SHEET / Bid Number '17/TBD/RFP

Name of Applicant/Project: Youthworks · Shelter Now (AHTF.)
Amount Requested: $ 51,800.00

CRITERIA	Weighted Value	Evaluation Points (1-5)	Total Points	Max. Score
Funding • Leverage amounts from other sources • Operating budget shows evidence of sufficient revenue to administer the proposed program • Secured matching resources	20%	4	80	100
Need/Benefit & Project Feasibility Data driven analysis that shows: • The proposal is responsive to current and future market demand • Income mix, if applicable • Site control • Realistic time frame for completion of funded project/program activities	40%	3	120	200
Affordability • The proposal meets the Affordability Requirements serving households of up to 120% AMI	20%	4	80	100
Demonstrated Capability – Organizational Management • Staff • Organizational Experience • Expertise in type(s) of housing or service(s) proposed • Demonstrated Financial Soundness	20%	4	80	100
TOTAL	100%		360.	500

EVALUATION POINTS: 1 -- Lowest 5 – Highest

[signature] 02/14/17

CDC Evaluator Name Signature Date

CITY OF SANTA FE (CSF)
NON-DISCLOSURE AND CONFLICT OF INTEREST STATEMENT

REQUEST FOR PROPOSAL #'17/22/P

EVALUATOR NAME: John A. Pavilla.

CSF policy is to prevent personal or organizational conflict of interest, or the appearance of such conflict of interest, in the award and administration of CSF contracts and Purchase Orders.

I, John A. Pavilla, the undersigned, hereby certify that the following statements are true and correct and that I understand and agree to be bound by commitments contained herein.

I am acting at the request of CSF as a participant in the evaluation of *offers/ proposals* received in response to the *Request for Offers/ Request for Proposals,* entitled and/ or numbered
I am acting of my own accord and not acting under duress. I am not currently employed by, nor am I receiving any compensation from, nor have I been the recipient of any present or future economic opportunity, employment, gift, loan, gratuity, special discount, trip, favor, or service in connection with any *offer/ proposal* or involved *Offeror/Proposer* in return for favorable consideration. I have no preconceived position on the relative merits of any of the *offers/ proposals* nor have I established a personal preference or position on the worth or standing of any *Offeror/ Proposer* participating in this action. CSF policy is to prevent personal or organizational conflict of interest, or the appearance of such conflict of interest, in the award and administration of CSF contracts, including, but not limited to contracts for professional services, agreements with consultants and Purchase Orders.

I hereby certify that to the best of my knowledge and belief, no conflict of interest exists that may diminish my capacity to perform an impartial, technically sound, objective review of this proposal(s) or otherwise result in a biased opinion or unfair competitive advantage.
I agree not to disclose or otherwise divulge any information pertaining to the contents, status, or ranking of any *offer/ proposal* to anyone other than the team leader or other evaluation team members. I understand the terms and "disclose or otherwise divulge" to include, but are not limited to, reproduction of any part or any portion of any *offer/ proposal,* or removal of *same from* designated areas without prior authorization from the evaluation team leader. I agree to perform any and all evaluations of said *offers/ proposals* in an unbiased manner, to the best of my ability, and with the best interest of CSF paramount in all decisions.
I agree to return to CSF Purchasing Department all copies of proposals, as well as any abstracts, upon completion of the evaluation.

02/14/17

SIGNATURE AND DATE:

2017-2018 AHTF APPLICATION

General Information

Applicant Name(s): YouthWorks

Address: 1000 Cordova Pl., #415

Federal Tax ID #: 85-0480524

City Business Reg. #: 17-00091367

CRS#: 02-471161-00-6

City/State/Zip Code: Santa Fe, NM 87505

Telephone: 505-989-1855

Project Contact: Melynn Schuyler

Email Address: melynn@santafeyouthworks.org

Amount of Allocation Requested: $ $51,800.

Type of Applicant:

☐ Partnership ☐ Corporation ☒ Non-Profit* ☐ Other

* Non-profit must provide proof of non-profit status. This proof includes submittal of current registration as charitable organization with the NM Attorney General's Office, covering the most recent Fiscal Year, or proof of exemption. Information can be obtained online at https://secure.nmag.gov/coros/. Verification should be in the form of the first page of the "NM Charitable Organization Statement."

Project Name: ShelterNow!

Project Address (if applicable):

City/State/Zip Code: Santa Fe, NM 87505

Priority Project

Select one of the categories your project falls under:

☐ **Rental Vouchers** - Provide supported rental vouchers (includes access to counseling, health services, case management, and other services) to renters earning less than 50%AMI;

☒ **Emergency Shelters including permanent supported shelter housing** - Development, construction, and preservation of shelter/permanent supported rental facilities, including infrastructure improvements;

☐ **Provision of Rental Units and Support Services for Low Income (up to 50% AMI) and Extremely Low Income Renters (less than 30% AMI)** - Acquisition, conversion, preservation and new construction of tiered income multi-family rental properties; including infrastructure or one-time emergency rental assistance;

☐ **Down payment Assistance/Increase of Ownership Opportunities** - Down payment assistance in the form of soft-second mortgage that "buys down" principal amount of loan to lower monthly payment; Acquisition, conversion, preservation and new construction of homeownership housing;

☐ **Homeowner Rehabilitation Programs, Energy Efficiency Upgrades, Accessibility Retrofits** - Aacquisition, conversion, and preservation of *affordable housing that accommodates needs of current householders.*

* families and Tiny Homes *

Project Description:

Please provide a narrative of your project. Specifically who will be served, anticipated outcomes, etc. (If needed continue on a separate sheet)

ShelterNow! is a collaboration of youth-serving organizations that have joined forces to address the gap in housing availability and homelessness for young adults ages 18-24. It was formed from a working group of concerned organizations that work daily to serve the highest need youth and young adults in Santa Fe. Over the past two years, Santa Fe's community of youth *providers have been searching for an appropriate, effective way to temporarily house* unaccompanied and dislocated youth in need of shelter during the cold winter months. Santa Fe's Adelante Homeless Youth & Children Task Force has been exploring this issue through a working group, based upon agency-reported evidence and direct observations that up to 200 youth ages 18-24 have been disconnected from school, stable housing, consistent work and the many traditional systemic services/benefits. Currently there is no developmentally appropriate shelter for young adults ages 18-24 in the Santa Fe area. Youth have described trading sex or drugs or being trafficked and forced into prostitution for a warm place to sleep, or

18/18-24 yrs

they have no other option than sleeping outdoors, in parked cars or in a variety of unsafe, unhealthy settings during the severe winter months.

This situation has been an "emergency" for many years, since no homeless service provider has funding and/or a mission to serve this particular age group with temporary shelter. Several days before the collaborative organizations were closing for the December 2016 holiday break an opportunity arose to address the issue this winter. The Collaborative Shelter Working Group (CSWG) seized the moment. The CSWG is comprised of representatives from SFPS Adelante Program, YouthWorks, Youth Shelters and Family Services (YSFS) Transitional Living Program, YSFS Street Outreach, Santa Fe Birth to Career Collaborative sponsored by SF Community Foundation and Concerned Community Members.

The CSWG received an unsolicited call from the Kind World Foundation, who had read an article about one of our unaccompanied homeless youth who was 18 and hoping to graduate school this year. The Foundation was concerned that this student and many others are left to couch surf from home to home or live outdoors, especially during the winter months. Since the Adelante Homeless Youth & Children Task Force had a group already troubleshooting this issue, jumped at the opportunity and worked during the holidays to meet the Foundations' challenge to raise match funds and initiate an emergency shelter by January 15, 2017.

With the generous interim financial support recently garnered through foundations and private donors in response to the crisis, we must take advantage of this opportunity to finally bring a solution to this housing crisis faced by the community. We are determined to bring community awareness to the issue and take action to address the needs of a population that is often ignored, labeled as "adults," even though they are truly in a transitional, fragile stage of life, trying to hold onto jobs and go to school while homeless, in a city with few available, affordable housing options.

After years of grappling with how to solve this crisis, the working group was presented with a true opportunity to address this issue when the Kind World Foundation offered us a grant of $50,000 and challenged us to raise the remaining needed funds and get the shelter running as soon as possible. As the cold weather was upon us, it was crucial that we launch the shelter quickly. By January 15, 2017, an additional $25,000 had been raised by the Collaborative Shelter Working Group from private donors and local foundations to meet the emergency match, the response from funders and donors was immediate, and ShelterNow!, as the project was named, was nearly ready. The CSWG was also reaching out to any and all potential facilities, schools, the city, other nonprofits and churches to determine a location to house the shelter, the pilot project was funded but had nowhere to launch. The Interfaith Leadership Alliance (ILA) and their Social Justice Committee swiftly came to the rescue with news of the pilot program and need since ShelterNow! needed to begin operations quickly due to the freezing temperatures. The ILA agreed to house ShelterNow! from January 16, 2017 to May 1, 2017, with shelter housing at faith facilities rotating on a weekly basis between four Interfaith member churches and synagogues.

The shelter was launched on January 16, 2107. ShelterNow! is coordinated by a shelter manager who will conduct community outreach, fundraising, case management and warm

hand-offs for referrals, scheduling, staff supervision and professional development, and will collect and maintain data for continuous program adaptation and improvement. With a rotating schedule of approximately 6-7 overnight shelter staff, ShelterNow! is equipped to serve up to 25 youth participants daily. Youth Shelters and Family Services (YSFS) have provided staff training d technical assistance, and YSFS Street Outreach has assisted with youth referrals, daily showers and assistance with snacks and a place to do laundry; Adelante has helped with securing supplies, locating outside support and recruiting staff and other resources; and YouthWorks is taking the lead as fiscal agent and coordination and scheduling of staffing, employment and payroll of staff, evening meals, transportation, insurance and day-time case management. The CSWG is working together and remains committed to its collaboration to address this crisis now, and is strategizing to design a sustainable plan for future operations in order to finally alleviate the issue for young adults seeking stability.

1. Funding:

How will the AHTF allocation be used for this project? What additional funding sources are secured or will be secured upon receipt of allocation? The City of Santa Fe requires financing from other sources to be committed prior to the release of funds from the AHTF.

AHTF funding will provide a per youth/per day subsidy emergency shelter voucher. This voucher will allow ShelterNow! to expand the number of weeks of service from its current 12 weeks to 20 weeks and the support services during operation next winter. The Collaborative Shelter Working Group will ask Kind World Foundation to support ShelterNow! with a $50,000 grant again at the end of 2017 for future operations, and will seek other foundation and donor support for 2017-18, with the knowledge that a permanent solution is being sought. ShelterNow! plans to provide the shelter from December 2017 through April 2018. The Collaborative Shelter Working Group will continue to provide training, supplies, wraparound services, and staffing and administrative support and interagency referrals and resource provision to meet the needs of the project. Combining resources is a logical solution to address a need that has affected us all in our daily social services work.

Leveraging/Matching Requirement:

$3 to $1 Leveraging: for every $1 allocated through the AHTF, at least $3 from other sources will be expected (leveraged funds can include long term mortgages, other sources of grants, owner equity, proceeds from Low Income Housing Tax Credits, or the current value of land); organizational resources should be used to provide $1 of match (See Exhibit A for example)

Briefly Describe: YouthWorks, as the fiscal umbrella for the CSWG is seeking an AHTF funding allocation of $51,800 for Emergency Shelter category funding. The AHTF Request will be matched with funding requests also proposed to the Kind World

Foundation and additional local and national funders, as well as our donor base. The sub-recipient Match is projected at $75,000 for the five month operating budget. Additionally, The Collaborative Shelter Working Group organizations will provide leverage in the amount of $85,600 in organizational resources to cover case management, education support or job training/placement; food; transportation; staff training and insurance and fiscal oversight.

Project Budget and/or Development Pro-Forma: demonstrate use of leveraged and matching funds as well as evidence that operating budget is sufficient to administer the proposed program/project (please attach documents as well as give brief overview below)

Sub-recipient Budget – with Matching and Leveraging

4 staff from partner agencies provide Admin., screening, and oversight 36 hrs./wk X Avg salary of $30.00/hr X 20 wks	$21,600.	$21,600.	Leverage
Sub-recipient's – Match from Kind World Foundation ($50,000) and other grant applications and private donations ($25,000)	$75,000.	$75,000.	Sub-recipient Match
In-kind supplies purchased or donated by partner organization, i.e. sleeping bags, storage bins, back packs, hygiene supplies, laundry and meals	$40,000.	$40,000.	Leverage
Workforce/education/training/case management staff provided by 3 partner agencies: $24.00/hr X 50 hrs/wk X 20 wks	$24,000.	$24,000.	Leverage
Per Day/Youth emergency shelter daily operations and support based on 10 youth X 20 wks X 7 days/week X $37/day	$51,800.	$51,800	AHTF

AHTF Grant Request	$51,800	Ratio
Total Leverage	$85,600	
Total Sub-recipient Match	$75,000	
Total Sub-recipient Match	$160,600	$3.10 to $1

2. Need/Benefit & Project Feasibility:

Demonstrate, using data-based analysis, that there is a clear connection between the proposed project/program and adopted Priority(s), and evidence that the proposed project/program meets current and future market demands. Provide narrative below (use additional sheets as necessary):

Shelter Now! clearly ties to the **Emergency Shelters including permanent supported shelter housing Priority**. The AHTF request will provide support for facility rental to operate for five months in 2017-2018.

Santa Fe's Adelante Homeless Youth & Children Task Force has been troubleshooting this critical housing issue through a working group, based upon anecdotal evidence, program data from multiple organizations, City of Santa Fe Task Force work and observations that up to 200 youth age 18-25 have been disconnected from school, stable housing, consistent work and many traditional services/benefits.

Some reasons for lack of access to safe shelter are:

- Age and Family Configuration limits – Youth Emergency Shelter accepts from age 10-17 and Casa Familia, St. Elizabeth's and Interfaith Shelter house older adults or families, making them developmentally inappropriate for youth or younger adults.
- Young adults, ages 18-24 report fear of chronically homeless, substance-using older adults in the shelters as well as the fear of theft of their limited personal belongings. As a result, this population often chooses to sleep in unsafe cold, outdoor locations in order to avoid the dangers they fear at the Pete's Place shelter.
- If the youth is part of a couple, they must stay in different/separate places. This occurs during a time when, developmentally, they may be trying to form family and logistically, they are searching for supportive people in their lives.
- There are no developmentally appropriate shelters for youth with a baby or toddler.
- The youth may have behavioral health issues preventing him/her from accessing shelter and stable housing.

Youth have described trading sex or drugs for a warm place to sleep, being trafficked and forced into prostitution, or sleeping outdoors or in parked cars, and in a variety of unsafe, unhealthy, potentially life-threatening settings during the winter months.

This situation has been an "emergency" for many years, since no homeless provider has funding and/or a mission to serve this *particular age group with temporary* shelter. With the generous financial support offered to us through foundations and private donors, and with the momentum that this this opportunity has brought, it is important to grasp the immediacy of this crisis now and plan for the future. Community awareness has been raised with the advent of the launch of ShelterNow!, through fundraising Interfaith Leadership Alliance partnership, bringing congregations together to assist with sharing their resources for young participants who require attention to reach stability. Now is the time to continue to address the needs of a population that is often ignored, as our society labels them "adults," and unduly expects them to overcome the housing obstacles that are insurmountable in a city with an affordable housing crisis..

What is the timeline for the project?

The shelter will open on December 1, 2017 and close on April 20, 2018. Operations will run 7 nights per week from 7:30 pm to 7:30 am, with agency-based supportive services available during the day time to assist with job search, placement, case management and other necessary inputs to bring stability to each participant's case.

Site Information (if applicable) ***NA***

If your proposed project include acquisition, conversion, preservation and new construction of homeownership or rental housing, please provide the following information.

Site control is or will be in the form of*: ☐ Deed ☐ Option

☐ Lease (Term_____Years) ☐ Purchase Contract ☐ Other (explain)

_____

* If project is recommended for funding, proof of site control must be provided before funds are disbursed.

Expiration Date of Contract, Option, or Lease

(month/year) **Site Description:**

Area of Site:_____acres or_____square feet

Is site zoned for your development? ☐ Yes ☐ No Zoning_

_____ If no, is site currently in the process of re-zoning?

Yes ☐ ☐No Re-Zoning_____

When is zoning issue to be resolved?_____(month/year)

Has the City approved the site plan and/or plat?☐ Yes ☐ No If yes, provide a copy of the site plan/plat.

Are there any other development reviews and approvals required? ☐ Yes☐ No

If yes, explain:

_____

_____

_____

_____

List any required reports or studies underway or completed such as soils report, environmental assessment, traffic study) ***NA***

_____

_____

_____

_____

Has the City issued the building permit? ☐ Yes ☐

☐ No Are all☐

utilities presently available to the site? Yes

No

If no, which utilities need to be brought to the site? _____

3. Affordability: NA

Outline the affordability time period for this project based on the following: (i.e. loans to $14,999 – 5 years, $15,000 to $40,000 – 10 years, 40,001-$100,000 – 15 years and over $100,000 – 20 years)

_____

_____

4. Demonstrated Capability - Organizational Capacity

Describe the expertise of your organization and past projects to provide the type of housing or programs proposed for funding:

YouthWorks as fiscal and administrative organization for the project has extensive City, State and Federal reporting and programming experience. Since 2001, YouthWorks has served thousands of youth while expanding youth development opportunities that include high impact interventions, youth advocacy, alternative education, leadership training and employment connections for youth and young adults, critically improving the health of the community and the positive youth outcomes. In a given year the organization regularly oversees more than 20 contracts and grants on the local, state, and federal level, as well as managing over 300-500 youth student/trainee/employees and maintains a staff of fifteen employees and contractors. The Collaborative Shelter Working Group has over 50 years' experience working in Santa Fe with youth in crisis, homeless or housing insecure.

Describe your staffing and attach resumes of key personnel:

YouthWorks is the serving as the fiscal and administrative lead for ShelterNow! Heather Vigil and Melynn Schuyler are lead operations administrators for YouthWorks. Madigan Chandler, Youth Shelters and Family Services, is lead trainer and will provide ongoing technical assistance. Paige, Kitson with Youth Shelters's Street Outreach program coordinates snacks, hygiene

supplies, laundry facilities and shower space. Todd Pigg and Abaris De Los Santos, YouthWorks Teachers, will lead wrap-around education programming as needed. Devin Baldwin, YouthWorks Workforce Coordinator, will lead job readiness, training, and placement programming.

Demonstrate Financial Soundness. Please submit the following documentation:

- Audited Financial Statements for 2015 and 2014.
- Current Statement of Assets & Liability (2016 audit)

CITY OF SANTA FE
COMMUNITY DEVELOPMENT BLOCK GRANT (CDBG)
PROPOSAL SCORE SHEET / Bid Number '17/22/RFP

Name of Applicant/Project: SF. Recovery Center. (CDBG)

Amount Requested: $ 50,000.00

Evaluation Criteria	Weighted Value	Evaluation Points 1 thru 5	Total Score	Max Score
Activity to be funded • Why needed? Does it address a gap? • Steps/phases to complete the activity • Who is served? • #s proposed to be served	20	X 4	80	100
National Objective Compliance • Benefits low/moderate income persons/households? • Prevents slum/blight • Does the activity serve residents Citywide or a Low to Moderate Income (LMI) Area (i.e. Census Tract)?	20	X 3	60	100
Consolidated Plan Compliance • Does the application demonstrate that it meets Consolidated Plan priorities?	10	X 4	40	50
Budget • Is proposed budget realistic? • Are other funding sources secured?	10	X 3	30	50
Performance Measurement/Work Plan • Are performance measurements, outcomes and proposed outcomes well presented? Realistic? Well-supported in the application? • Does the applicant have the administrative capacity to carry out the activity to be funded?	20	X 3	60	100
		Total Points	270.	**400**

CDC Evaluator Name — Signature — 02/14/17 Date

CITY OF SANTA FE (CSF)
NON-DISCLOSURE AND CONFLICT OF INTEREST STATEMENT

REQUEST FOR PROPOSAL #'17/22/P

EVALUATOR NAME: John A. Padilla.

CSF policy is to prevent personal or organizational conflict of interest, or the appearance of such conflict of interest, in the award and administration of CSF contracts and Purchase Orders.

I, John A. Padilla., the undersigned, hereby certify that the following statements are true and correct and that I understand and agree to be bound by commitments contained herein.

I am acting at the request of CSF as a participant in the evaluation of *offers/ proposals* received in response to the *Request for Offers/ Request for Proposals,* entitled and/ or numbered
I am acting of my own accord and not acting under duress. I am not currently employed by, nor am I receiving any compensation from, nor have I been the recipient of any present or future economic opportunity, employment, gift, loan, gratuity, special discount, trip, favor, or service in connection with any *offer/ proposal* or involved *Offeror/Proposer* in return for favorable consideration. I have no preconceived position on the relative merits of any of the *offers/ proposals* nor have I established a personal preference or position on the worth or standing of any *Offeror/ Proposer* participating in this action. CSF policy is to prevent personal or organizational conflict of interest, or the appearance of such conflict of interest, in the award and administration of CSF contracts, including, but not limited to contracts for professional services, agreements with consultants and Purchase Orders.

I hereby certify that to the best of my knowledge and belief, no conflict of interest exists that may diminish my capacity to perform an impartial, technically sound, objective review of this proposal(s) or otherwise result in a biased opinion or unfair competitive advantage.
I agree not to disclose or otherwise divulge any information pertaining to the contents, status, or ranking of any *offer/ proposal* to anyone other than the team leader or other evaluation team members. I understand the terms and "disclose or otherwise divulge" to include, but are not limited to, reproduction of any part or any portion of any *offer/ proposal,* or removal of same from designated areas without prior authorization from the evaluation team leader. I agree to perform any and all evaluations of said *offers/ proposals* in an unbiased manner, to the best of my ability, and with the best interest of CSF paramount in all decisions.
I agree to return to CSF Purchasing Department all copies of proposals, as well as any abstracts, upon completion of the evaluation!

02/14/17.

SIGNATURE AND DATE:

Husky Refrigeration HVAC & Mechanical
4519 Contenta Ridge Rd
Santa Fe, NM 87507
(505)920-5698
huskyrefrigeration505@gmail.com
http://Huskymechanicalnm.com

ADDRESS
Santa Fe Recovery Center
4100 Lucia Lane
Santa Fe, NM 87507

ESTIMATE # 1272
DATE 01/25/2017

Services Raise 4 furnaces inside mechanical room. We will have to get removed Refrigerant from each unit, we will recover Refrigerant p, cut off refrigeration line set, to remove entire AC coil and furnace. We will remove gas line, drain line, cut off supply duct work to raise entire unit, once units are remove we will install a 2" filter rack to be able to access filters a lot easier. Once furnace and AC coil are put back in place, we will re due 5" flue pipe, drain line, supply duct work, weld refrigeration lines back an, pulled vacuum and each unit, recharged was unit with new Refrigerant as recommended charge for each unit. And test for proper operation.	1	1,728.00	1,728.00T
Part R22 Refrigerant 24 lbs $720.00 Copper fittings 3/8" & 7/8" qty 4 of each $46.00 Weld and vacuum $65.00 Recover refrigerant and dispose $85.00 Sheet metal $85.00 Duct seal, screws, tape, $34.00 2" filter rack qty 4 $444.00 Please note, if customer wants to re uses same Refrigerant price estimate will be $720.00 less, we highly recommend using new Refrigerant and recharged, as name plate requires.	1	1,394.00	1,394.00T

SUBTOTAL	3,122.00
TAX (8.3125%)	259.52
TOTAL	**$3,381.52**

Vinyl Tile		229 Sq Ft		$1,072.65
Line #	**Materials**	**Assigned Rooms**		**Pricing**
1	IMAGE UNAVAILABLE SKU: 107-971 / 12012 Allure Cherry $1.69 / Sq Ft **Support Materials:** Quarter Round: Unfinished	Home Office Other 1(OFFICE-STORE ROOM)	158 Sq Ft 70 Sq Ft	Materials*: $459.60 Labor**: $613.05

Asbestos Testing over 160 sf
Removal of vinyl $1.85 sf
Silumecoat $1.55 sf
Embossing $1.50 sf

Subtotal:$1,072.65

*Materials Included: Vinyl Tiles, Quarter round
**Labor Included: Delivery, Quarter round installation

Total Estimate (229 Sq Ft): $1,072.65

F PAID IN
MONTHS*

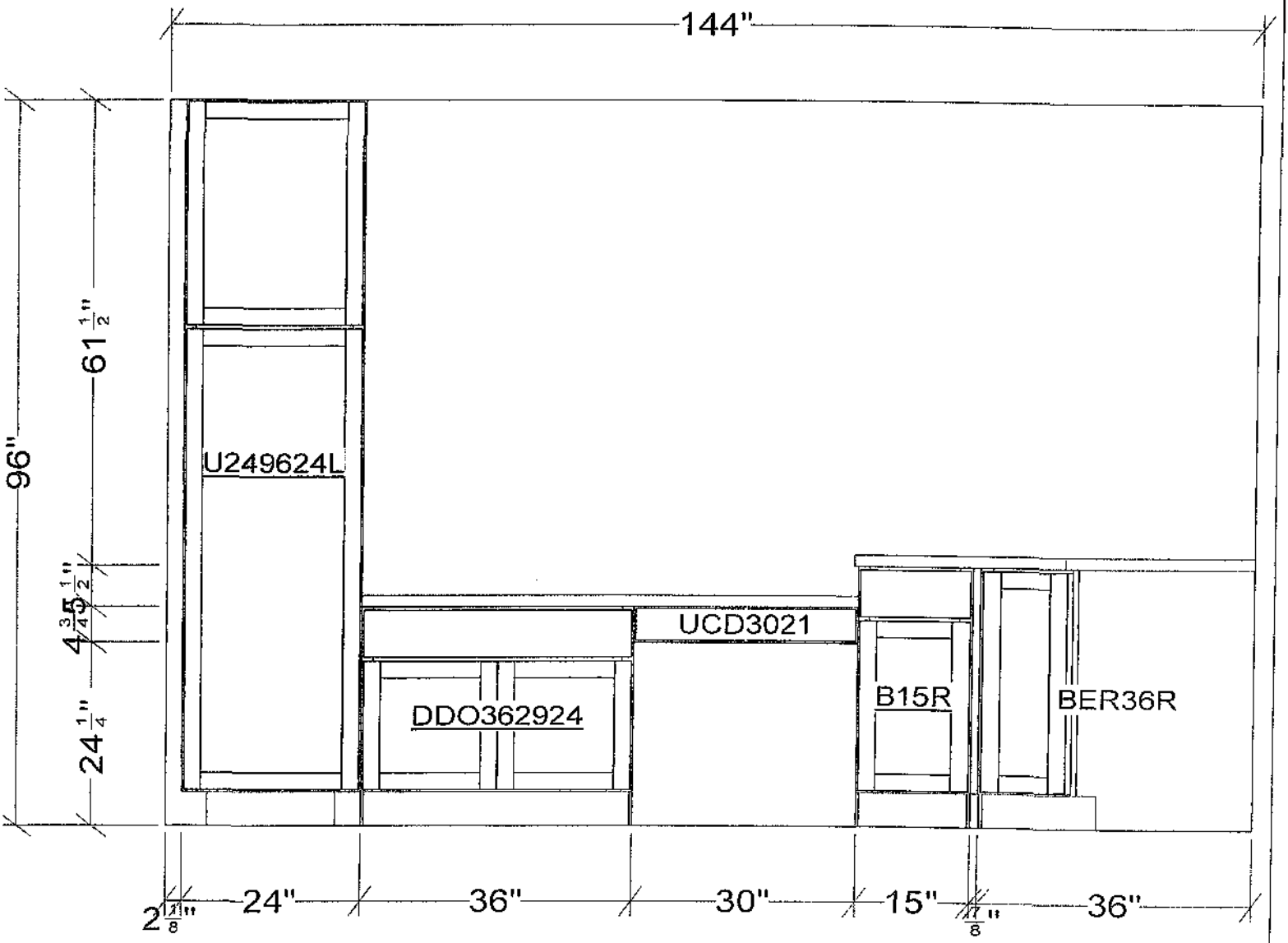
ll be charged to your account from the purchase
emiums for optional credit insurance) is not paid

ENTS
PER MONTH*

vould pay the purchase amount listed above

*With credit approval for qualifying purchases made on The Home Depot or EXPO Design Center Consumer Credit Card, 17.99% - 26.99% APR. Minimum interest charge: $2. See card agreement for details including APR applicable to you. Offer is only valid for consumer accounts. 6 months everyday credit offer is subject to change without notice. Minimum payments required. Offer only valid at homedepot.com and in The Home Depot retail stores. The suggested monthly payment stated is only an estimate based on listed purchase amount excluding sales tax, is rounded to the next highest dollar amount and does not include additional payments that may be required for an existing balance or future purchases. In order to pay your promotional balance by the end of the period, you may have to make a payment each month that is higher than your required minimum payment.

Pricing is an estimate only, final price is determined by the results of the measure and the final material selection. Additional charges may apply when the existing flooring is removed due to unforeseeable conditions (e.g. damage or deterioration). Please use this estimate as a guide to determine if the installation scope and materials are within your price range



All dimensions ,size designations given are subject to verification on job site and adjustment to fit job conditions.	THE HOME DEPOT	This is an original design and must not be released or copied unless applicable fee has been paid or job order placed.	Designed: 1/18/2017 Printed: 1/18/2017
11800813.kit		Et 1	Drawing #: 1 | No Scale.

QUOTE

Store 3501 EUBANK
200 EUBANK BLVD SE
ALBUQUERQUE, NM 87123

Phone: (505) 271-1900
Salesperson: LKI2EA
Reviewer: LKI2EA

 No. H3501-42607

QUOTE

SOLD TO

Name: **TAFOYA DUANE**
Phone 1: **(505) 344-3960**
Address: 1909 BRYN MAWR PL NE
Phone 2: (505) 803-2414
Company Name:
City: ALBUQUERQUE
Job Description: martha cabinets
State: NM Zip: 87106 County: BERNALILLO

2017-01-18 13:06
Prices Valid Thru: 01/18/2017

VENDOR DIRECT SHIP #1

MERCHANDISE AND SERVICE SUMMARY

We reserve the right to limit the quantities of merchandise sold to customers

TO: CUSTOMER

S/O - MERCHANDISE TO BE SHIPPED: S/O MARTHA STEWART LIVIN REF # S01 ESTIMATED ARRIVAL DATE: 02/22/2017

REF #	SKU	QTY	UM	DESCRIPTION	PI	TAX	PRICE EACH	EXTENSION
S0101	0000-824-509	1.00	EA	U249624L / U249624L UTILITY 24W 96H 24D LH / U249624L FSIDES:B HINGES:L	A		$986.77	$986.77
S0102	0000-824-509	1.00	EA	FPEB-T / FPEB-T FLUSH FURNITURE PLYWOOD ENDS / ATT:U249624L FPEB-T FSIDES:B	A	Y	$193.54	$193.54
S0103	0000-824-509	1.00	EA	DDO362924 / DDO362924 DESK DR DRW 36W 29H 24D / DDO362924 FSIDES:R HINGES:B	A	Y	$352.28	$352.28
S0104	0000-824-509	1.00	EA	FPEB-B / FPEB-B FLUSH FURNITURE PLYWOOD ENDS / ATT:DDO362924 FPEB-B FSIDES:B	A	Y	$123.47	$123.47
S0105	0000-824-509	2.00	EA	UCD3021 / UCD3021 UNDER COUNTER DRW 30W 21D / UCD3021 HINGES:B	A	Y	$182.10	$364.20
S0106	0000-824-509	1.00	EA	B15R / B15R BASE 15 DRW RH / B15R FSIDES:B HINGES:R	A	Y	$253.13	$253.13
S0107	0000-824-509	1.00	EA	FPEB-B / FPEB-B FLUSH FURNITURE PLYWOOD ENDS / ATT:B15R FPEB-B FSIDES:B	A	Y	$123.47	$123.47
S0108	0000-824-509	1.00	EA	BER36R / BER36R BASE EASY REACH 36 RH / BER36R FSIDES:L HINGES:R	A	Y	$496.24	$496.24
S0109	0000-824-509	1.00	EA	B18L / B18L BASE 18 DRW LH / B18L FSIDES:R HINGES:L	A	Y	$264.09	$264.09
S0110	0000-824-509	1.00	EA	FPEB-B / FPEB-B FLUSH FURNITURE PLYWOOD ENDS / ATT:B18L FPEB-B FSIDES:B	A	Y	$123.47	$123.47

*** CONTINUED ON NEXT PAGE ***

NOT VALID FOR MERCHANDISE CARRY OUT

VENDOR DIRECT SHIP #1
(Continued)

TO: CUSTOMER

S0111	0000-824-509	1.00	EA	DDO362924 / DDO362924 DESK DR DRW 36W 29H 24D / DDO362924 FSIDES:L HINGES:B	A	Y	$352.28	$352.28
S0112	0000-824-509	1.00	EA	FPEB-B / FPEB-B FLUSH FURNITURE PLYWOOD ENDS / ATT:DDO362924 FPEB-B FSIDES:B	A	Y	$123.47	$123.47
S0113	0000-824-509	1.00	EA	DDR242924 / DDR242924 DESK DRW BASE 24W 29H 24D / DDR242924 FSIDES:R HINGES:B	A	Y	$418.07	$418.07
S0114	0000-824-509	1.00	EA	FPEB-B / FPEB-B FLUSH FURNITURE PLYWOOD ENDS / ATT:DDR242924 FPEB-B FSIDES:B	A	Y	$123.47	$123.47
S0115	0000-824-509	9.00	EA	NONE-DR / NONE-DR { NO DOOR PULLS } / NONE-DR HINGES:L	A	Y	$0.00	$0.00
S0116	0000-824-509	13.00	EA	NONE-DW / NONE-DW { NO DRAWER PULLS } / NONE-DW HINGES:L	A	Y	$0.00	$0.00
S0117	0000-824-509	3.00	EA	TB8WD14 / TB8WD14 TOE BOARD .25 WOOD / TB8WD14	A	Y	$17.64	$52.92
S01FR	0000-506-658	1.00		S/O FREIGHT SKU	A	Y	$250.00	$250.00

VENDOR - SPECIAL INSTRUCTIONS: LINE: MARTHA DSTYLE:SELECTED DOOR STYLE USTYLE:MAIDS-LAM-SQ TSTYLE:STANDARDDF WOOD:STANDARD FINISH:SHARK HDW:NONE-DR DSGNR:lki2ea

VENDOR WILL SHIP MDSE TO: TAFOYA DUANE

ADDRESS: 1909 BRYN MAWR PL NE **CITY:** ALBUQUERQUE

STATE: NM **ZIP:** 87106 **COUNTY:** BERNALILLO **SALES TAX RATE:** 7.312 **MERCHANDISE TOTAL:** $4,600.87

PHONE: (505) 3443960 **ALTERNATE PHONE:** **PAGER:**

END OF VENDOR DIRECT SHIP

INSTALLATION #1

REF # I19

BASIC INSTALLATION LABOR:

SKU	DESCRIPTION	QTY	UM	TAX	PRICE EACH	EXTENSION
0000-948 -948	WILSONART F&I POSTFORM LAMINATE-NAT/	0.00	SF	Y	$0.01	$0.00

OPTIONAL LABOR SELECTED INCLUDES:

OPTION	DESCRIPTION	QTY	UM	TAX	PRICE EACH	EXTENSION
3	POST FORM DECK GROUP C/GOLDEN ROMANO, 35-MIRAGE	48.00	SF	Y	$31.00	$1,488.00

*** CONTINUED ON NEXT PAGE ***

INSTALLATION #1
(Continued)

REF #I19

5	POST FORM EDGES GROUP B/BULLNOSE	19.00	LF	Y	$6.00	$114.00

INSTALLATION SITE NAME: TAFOYA, DUANE

ADDRESS: 1909 BRYN MAWR PL NE

CITY: ALBUQUERQUE **STATE:** NM **ZIP:** 87106

COUNTY: BERNALILLO **SALES TAX RATE:** 7.312 **TAX:** Merchandise - Y **LABOR** - Y

PHONE: (505) 8032414 **ALTERNATE PHONE:** (505) 8032414

INSTALLER SPECIAL INSTRUCTIONS: golden romano desk application bullnose edge

INSTALL LABOR CHARGE:	$1,602.00
TRIP CHARGE:	$0.00
CREDIT FOR DEPOSIT/MEASURE:	$0.00
INSTALL TOTAL DUE:	$1,602.00

BASIC INSTALLATION LABOR INCLUDES:

* 1 YEAR LIMITED WARRANTY ON WORKMANSHIP
* IN HOME INSPECTION TO VERIFY LAYOUT, MEASUREMENTS, SPECIAL INSTALLATION REQUIREMENTS AND TEMPLATING
* DELIVERY WITHIN 30 MILE RADIUS OF STORE
* FAUCET HOLE DRILLING (UP TO 4 HOLES)
* TWO (2) MITERED CUTS (ONE MITRED CORNER AND ASSEMBLED)
* APPLIED END CAPS
* ONE SINK OR COOKTOP CUTOUT (TOPMOUNT) PER PROJECT
* CAULKING ALL CONTACT POINTS (WITH COLOR MATCHED CAULKING)
* SECURING PENINSULA, KITCHEN AND VANITY TOPS
* SOLID BUILD UP WITH PARTICLE BOARD AS NEEDED
* FINAL INSPECTION WITH CUSTOMER INCLUDING INSTRUCTIONS ON CARE AND/OR TEST PRODUCT TO ENSURE PROPER OPERATION
* FINAL CLEAN UP OF ALL DEBRIS RELATED TO INSTALLATION

UNLESS STATED ABOVE THIS INSTALLATION DOES NOT INCLUDE:

CUSTOM EDGES ON BACKSPLASH

CUT AROUND POSTS OR ODD SHAPES (OTHER THAN SQUARE/NOTCH CUT OUTS)

LAMINATE APPLIED TO WALL

REMOVAL OF LAMINATE COUNTERTOP FASTENED FROM TOP DOWN INTO CABINETS. THIS IS A SUPPLEMENTAL CHARGE TO THE REMOVAL CHARGE ENSURING APPROPRIATE PRECAUTIONS ARE TAKEN TO NOT DAMAGE THE CABINETS THAT ARE FASTENED TO.

REMOVAL OF NON-LAMINATE COUNTERTOP FASTENED FROM TOP DOWN INTO CABINETS. THIS IS A SUPPLEMENTAL CHARGE TO THE REMOVAL CHARGE ENSURING APPROPRIATE PRECAUTIONS ARE TAKEN TO NOT DAMAGE THE CABINETS THAT ARE FASTENED TO.

WINDOW SILLS, GARDEN WINDOWS AND PASS THROUGHS

WORK ON SUNDAYS OR HOLIDAYS

MILEAGE BEYOND 60 MILES FROM STORE ONE WAY

SPECIAL NOTES:

* CHILDREN AND PETS MUST BE KEPT AWAY FROM THE WORK AREA
* AN ADULT OVER 18 YEARS OF AGE WITH THE AUTHORITY TO MAKE DECISIONS ABOUT YOUR INSTALLATION MUST BE PRESENT DURING THE INSPECTION (WHEN APPLICABLE), DELIVERY AND INSTALLATION

CUSTOMER MUST HIRE THEIR OWN CONTRACTOR TO MAKE THE REPAIRS.

* ALL BREAKABLES AND/OR VALUABLE OBJECTS MUST BE REMOVED FROM THE WORK AREA PRIOR TO INSTALLATION
* ADDITIONAL CHARGES AT THE JOBSITE MAY BE NECESSARY TO

*** CONTINUED ON NEXT PAGE ***

INSTALLATION #1
(Continued)

REF #I19

* CANCELLING APPOINTMENTS WITH INSTALLERS OR MISSING SCHEDULED APPOINTMENTS MAY LEAD TO ADDITIONAL CHARGES
* REFER TO PRODUCT MANUAL FOR SPECIFIC WARRANTY AND MAINTENANCE INFORMATION.
* IF UNFORESEEN LABOR IS NEEDED TO REPAIR DAMAGE FROM WATER, TERMITES, ELECTRICAL OR PLUMBING PROBLEMS, THERE IS AN ADDED CHARGE WHICH MAY NOT BE AVAILABLE FROM HOME DEPOT SO THE COMPLETE THE JOB AND/OR BRING THE INSTALL INTO COMPLIANCE WITH LOCAL AND/OR STATE CODES
* THE INSTALLER MAY DECLINE TO INSTALL THE JOB IF IN THEIR PROFESSIONAL OPINION IT SEEMS UNSAFE, IN VIOLATION OF STATE OR LOCAL CODES OR CANNOT BE PERFORMED TO INDUSTRY STANDARDS

END OF INSTALL #1

INSTALLATION #2

REF # I21

BASIC INSTALLATION LABOR:

SKU	DESCRIPTION	QTY	UM	TAX	PRICE EACH	EXTENSION
0000-133-441	CORIAN SOLID SURFACE-NAT/	0.00	SF	Y	$0.01	$0.00

OPTIONAL LABOR SELECTED INCLUDES:

OPTION	DESCRIPTION	QTY	UM	TAX	PRICE EACH	EXTENSION
8	EDGE DETAIL - GROUP C/BULLNOSE	19.00	LF	Y	$16.00	$304.00
177	*PROMO 1/12-1/29/17 NATL* 10% OFF SPECIAL BUY- GP A-C COLORSW/ 25 SF MIN PURCHASE. ORDER MUST B PAID BY 1/29-ADJUSTMENTSBY 4/23. COMBINABLE W/NATL/RGNL OFFERS. STANDARD FABRICATN/ NSTALLATION CHARGES APPLY. NO CREDIT APPLIED IF OFFER REFUSD/SANDSTONE	48.00	SF	Y	$35.10	$1,684.80

INSTALLATION SITE NAME: TAFOYA, DUANE

ADDRESS: 1909 BRYN MAWR PL NE

CITY: ALBUQUERQUE **STATE:** NM **ZIP:** 87106

COUNTY: BERNALILLO **SALES TAX RATE:** 7.312 **TAX:** Merchandise - Y **LABOR** - Y

PHONE: (505) 8032414 **ALTERNATE PHONE:** (505) 8032414

INSTALL LABOR CHARGE:	$1,988.80
TRIP CHARGE:	$0.00
CREDIT FOR DEPOSIT/MEASURE:	$0.00
INSTALL TOTAL DUE:	$1,988.80

INSTALLER SPECIAL INSTRUCTIONS: sandstone bullnose edge office application

BASIC INSTALLATION LABOR INCLUDES:

* IN HOME INSPECTION TO VERIFY LAYOUT, MEASUREMENTS, SPECIAL INSTALLATION REQUIREMENTS AND TEMPLATING
* FAUCET HOLE DRILLING (UP TO 4 HOLES)
* WALL SUPPORT CLEATS AS NEEDED AT CORNER CABINETS

*** CONTINUED ON NEXT PAGE ***

INSTALLATION #2
(Continued)

REF #121

* BASIC INSTALLATION OF COUNTERTOP
* ONE SINK OR COOKTOP CUTOUT (TOPMOUNT) PER PROJECT
* GROUP A EDGE DETAIL
* EASED EDGE ON BACKSPLASH (ALL EXPOSED EDGES)
* FINISHED EXPOSED ENDS (FLAT FINISH NO EDGE DETAIL) EXAMPLE: NEXT TO RANGE OR REFRIGERATOR
* SUBTOP OR SUPPORT STRIPS
* FINAL CLEAN UP OF ALL DEBRIS RELATED TO INSTALLATION
* DELIVERY WITHIN 30 MILE RADIUS OF STORE
* FINAL INSPECTION WITH CUSTOMER INCLUDING INSTRUCTIONS ON CARE AND/OR TEST PRODUCT TO ENSURE PROPER OPERATION

UNLESS STATED ABOVE THIS INSTALLATION DOES NOT INCLUDE:

WINDOW SILLS, GARDEN WINDOWS AND PASS THROUGHS
CABINET BUMP OUT
CUT AROUND POSTS OR ODD SHAPES
SUPPORT MATERIALS FOR OVERHANG (REQUIRED FOR OVERHANGS >6")
CUSTOM EDGES ON BACKSPLASH
REPAIR OR ALTERATIONS TO EXISTING CABINETRY
BORDER EDGES, DIFFERENT COLORS, DECORATIVE COLORS, DECORATIVE INLAYS
INLAY AROUND SINK (BEAUTY RING) SITS AT TOP OF INTEGRAL BOWLSINK AND BELOW DECK
MILEAGE BEYOND 60 MILES FROM STORE ONE WAY

SPECIAL NOTES:

* CHILDREN AND PETS MUST BE KEPT AWAY FROM THE WORK AREA
* CANCELLING APPOINTMENTS WITH INSTALLERS OR MISSING SCHEDULED APPOINTMENTS MAY LEAD TO ADDITIONAL CHARGES
* REFER TO PRODUCT MANUAL FOR SPECIFIC WARRANTY AND MAINTENANCE INFORMATION.
* IF UNFORESEEN LABOR IS NEEDED TO REPAIR DAMAGE FROM WATER, TERMITES, ELECTRICAL OR PLUMBING PROBLEMS, THERE IS AN ADDED CHARGE WHICH MAY NOT BE AVAILABLE FROM HOME DEPOT SO THE CUSTOMER MUST HIRE THEIR OWN CONTRACTOR TO MAKE THE REPAIRS.
* AN ADULT OVER 18 YEARS OF AGE WITH THE AUTHORITY TO MAKE DECISIONS ABOUT YOUR INSTALLATION MUST BE PRESENT DURING THE INSPECTION (WHEN APPLICABLE), DELIVERY AND INSTALLATION
* ALL BREAKABLES AND/OR VALUABLE OBJECTS MUST BE REMOVED FROM THE WORK AREA PRIOR TO INSTALLATION
* ADDITIONAL CHARGES AT THE JOBSITE MAY BE NECESSARY TO COMPLETE THE JOB AND/OR BRING THE INSTALL INTO COMPLIANCE WITH LOCAL AND/OR STATE CODES
* THE INSTALLER MAY DECLINE TO INSTALL THE JOB IF IN THEIR PROFESSIONAL OPINION IT SEEMS UNSAFE, IN VIOLATION OF STATE OR LOCAL CODES OR CANNOT BE PERFORMED TO INDUSTRY STANDARDS
* CORIAN'S PRIVATE COLLECTION (INCLUDES MARTHA STEWART LIVING) OFFERS TEXTURE AND MOVEMENT COMPARABLE TO STONE AND MITERED SEAMS ARE RECOMMENDED (ADDITIONAL CHARGES APPLY). SEAMS MAY CAUSE CHANGE IN PATTERN DIRECTION.

END OF INSTALL #2

INSTALLATION #3

REF # 120

*** CONTINUED ON NEXT PAGE ***

INSTALLATION #3
(Continued)

REF #I20

BASIC INSTALLATION LABOR:

SKU	DESCRIPTION	QTY	UM	TAX	PRICE EACH	EXTENSION
0000-724-053	SILESTONE 2CM-NAT/	0.00	SF	Y	$0.01	$0.00

OPTIONAL LABOR SELECTED INCLUDES:

OPTION	DESCRIPTION	QTY	UM	TAX	PRICE EACH	EXTENSION
6	EDGE DETAIL - GROUP B/BULLNOSE	19.00	LF	Y	$18.00	$342.00
232	*PROMO 1/12-1/29/17* 10% OFF SELECT COLORS W/25 SF MINIMUM PURCHASE. ORDER MUST BE PAID BY 1/29- ADJUSTMENTS PAID BY 4/23. COMBINABLE W/NATL-RGNL OFFERS. STANDARD FABRICATION &INSTALLATION CHARGES APPLY. NO CREDIT APPLIED IF OFFR REFUSD/SIENNA RIDGE	48.00	SF	Y	$52.20	$2,505.60

INSTALLATION SITE NAME: TAFOYA, DUANE

ADDRESS: 1909 BRYN MAWR PL NE

CITY: ALBUQUERQUE **STATE:** NM **ZIP:** 87106

COUNTY: BERNALILLO **SALES TAX RATE:** 7.312 **TAX: Merchandise** - Y **LABOR** - Y

PHONE: (505) 8032414 **ALTERNATE PHONE:** (505) 8032414

INSTALL LABOR CHARGE:	$2,847.60
TRIP CHARGE:	$0.00
CREDIT FOR DEPOSIT/MEASURE:	$0.00
INSTALL TOTAL DUE:	$2,847.60

INSTALLER SPECIAL INSTRUCTIONS: sienna ridge 2 cm bullnose edge office application

BASIC INSTALLATION LABOR INCLUDES:

* IN HOME INSPECTION TO VERIFY LAYOUT, MEASUREMENTS, SPECIAL INSTALLATION REQUIREMENTS AND TEMPLATING
* BASIC INSTALLATION OF COUNTERTOP
* ONE SINK OR COOKTOP CUTOUT (TOPMOUNT) PER PROJECT
* FAUCET HOLE DRILLING (UP TO 4 HOLES)
* WALL SUPPORT CLEATS AS NEEDED AT CORNER CABINETS
* EASED OR RADIUS CORNERS UP TO 3/4" MAX
* EASED EDGE ON BACKSPLASH (ALL EXPOSED EDGES)
* SUBTOP OR SUPPORT STRIPS
* GROUP A EDGE DETAIL
* FINAL CLEAN UP OF ALL DEBRIS RELATED TO INSTALLATION
* DELIVERY WITHIN 30 MILE RADIUS OF STORE
* FINAL INSPECTION WITH CUSTOMER INCLUDING INSTRUCTIONS ON CARE AND/OR TEST PRODUCT TO ENSURE PROPER OPERATION

UNLESS STATED ABOVE THIS INSTALLATION DOES NOT INCLUDE:

WINDOW SILLS, GARDEN WINDOWS AND PASS THROUGHS
CABINET BUMP OUT
CUT AROUND POSTS OR ODD SHAPES
SUPPORT MATERIALS FOR OVERHANG (REQUIRED FOR OVERHANGS >6")
CUSTOM EDGES ON BACKSPLASH
REPAIR OR ALTERATIONS TO EXISTING CABINETRY
MILEAGE BEYOND 60 MILES FROM STORE ONE WAY

*** CONTINUED ON NEXT PAGE ***

INSTALLATION #3
(Continued)

REF #120

SPECIAL NOTES:

* CHILDREN AND PETS MUST BE KEPT AWAY FROM THE WORK AREA
* CANCELLING APPOINTMENTS WITH INSTALLERS OR MISSING SCHEDULED APPOINTMENTS MAY LEAD TO ADDITIONAL CHARGES
* REFER TO PRODUCT MANUAL FOR SPECIFIC WARRANTY AND MAINTENANCE INFORMATION.
* IF UNFORESEEN LABOR IS NEEDED TO REPAIR DAMAGE FROM WATER, TERMITES, ELECTRICAL OR PLUMBING PROBLEMS, THERE IS AN ADDED CHARGE WHICH MAY NOT BE AVAILABLE FROM HOME DEPOT SO THE CUSTOMER MUST HIRE THEIR OWN CONTRACTOR TO MAKE THE REPAIRS.
* AN ADULT OVER 18 YEARS OF AGE WITH THE AUTHORITY TO MAKE DECISIONS ABOUT YOUR INSTALLATION MUST BE PRESENT DURING THE INSPECTION (WHEN APPLICABLE), DELIVERY AND INSTALLATION
* ALL BREAKABLES AND/OR VALUABLE OBJECTS MUST BE REMOVED FROM THE WORK AREA PRIOR TO INSTALLATION
* ADDITIONAL CHARGES AT THE JOBSITE MAY BE NECESSARY TO COMPLETE THE JOB AND/OR BRING THE INSTALL INTO COMPLIANCE WITH LOCAL AND/OR STATE CODES
* THE INSTALLER MAY DECLINE TO INSTALL THE JOB IF IN THEIR PROFESSIONAL OPINION IT SEEMS UNSAFE, IN VIOLATION OF STATE OR LOCAL CODES OR CANNOT BE PERFORMED TO INDUSTRY STANDARDS

END OF INSTALL #3

TOTAL CHARGES OF ALL MERCHANDISE & SERVICES

Policy Id (PI):
A: 90 DAYS DEFAULT POLICY;

'The Home Depot reserves the right to limit / deny returns. Please see the return policy sign in stores for details.'

ORDER TOTAL	$11,039.27
SALES TAX	$807.25
TOTAL	$11,846.52
BALANCE DUE	$11,846.52

END OF ORDER No. H3501-42607

Home Improvement Agreement
PLEASE READ THIS

Important additional information regarding Customer's rights may be contained in an attached State Supplement.

Scope: This "Agreement" consists of this page, the following General Terms and Conditions, the Invoice, the State Supplement if applicable, and any drawings or Change Orders expressly made a part of this Agreement. The Agreement is between the Customer identified on the Invoice and The Home Depot. Any installation services provided under this Agreement shall be performed by a licensed and insured third party Authorized Service Provider. The Home Depot does not perform architectural or engineering services, nor does it make structural changes to dwellings or other structures. The Home Depot and its Authorized Service Provider will perform installation services in accordance with applicable law.

Payment Schedule: Payment is required immediately as follows:

Payment:	$ 11039.27	**Due in full immediately.**
Sales Tax:	$ 807.25	**If applicable.**
Total Amount of Sale:	$ 11846.52	**Includes all applicable discounts, rebates, and taxes. Excludes finance charges.***

*Any interest payments or other finance charges will be determined by Customer's separate cardholder or loan agreement, to which The Home Depot is NOT a party, and will be in addition to Customer's payment under this Agreement. Customer is subject to the terms and conditions of the cardholder or loan agreement, as applicable. No funds should be made payable to Authorized Service Provider; however, Authorized Service Provider may collect Customer's payment(s) made payable to The Home Depot.

Anticipated Delivery / Installation Schedule

Delivery Date: TBD **Start Date:** **Finish Date:**

Acceptance and Authorization: Customer authorizes The Home Depot to order and arrange for the delivery of all goods and services included on the Invoice. Customer further agrees and understands that this Agreement is the entire agreement between Customer and The Home Depot with regard to said goods and services and supersedes all prior discussions and agreements, either oral or written relating to said goods and services. This Agreement can not be assigned or amended except by a writing signed by Customer and The Home Depot. Customer acknowledges and agrees that Customer has read, understands, voluntarily accepts the terms of and is entitled to and has received a complete copy of this Agreement at the time Customer signs the Agreement. Installation Professional's license number and permitting information may need to be provided later and as such this information may be omitted at the time this Agreement is signed.

Electronic Signature: The parties to the Agreement agree that the digital signatures of the parties included in this Agreement are intended to authenticate this writing and to have the same force and effect as the use of manual signatures. Customer acknowledges that he or she is the person named on The Home Depot contract number identified on the point of sale device.

CANCELLATION: CUSTOMER MAY CANCEL THIS AGREEMENT WITHOUT PENALTY OR OBLIGATION BY DELIVERING WRITTEN NOTICE TO THE HOME DEPOT BY MIDNIGHT ON THE THIRD BUSINESS DAY AFTER SIGNING THIS AGREEMENT. THE STATE SUPPLEMENT ATTACHED HERETO CONTAINS A FORM TO USE IF ONE IS SPECIFICALLY PRESCRIBED BY LAW IN CUSTOMER'S STATE. Under such circumstances, Customer's payment(s) will be returned within ten (10) business days after The Home Depot's receipt of Customer's notice.

Accepted by:

X _____ 01/18/2017
Customer's Signature Date

Authorized Service Provider's Full Business/Trade Name, Address and License No. or No(s)., as applicable:

_____

_____

_____

License No(s). _____

Authorized Service Provider's Tel. No. _____

X _____
Associate's/Authorized Service Provider's Full Signature

_____
Date

_____
Associate: Please print your salesperson's license number, if applicable.

Home Improvement Agreement
General Terms and Conditions

Questions? If The Home Depot store and Authorized Service Provider are unable to answer Customer's questions, Customer may contact The Home Depot Customer Care Department at 1-800-553-3199 or use the address below.

Responsibilities:

The Home Depot: will provide the products identified on the Invoice and make arrangements to have the Authorized Service Provider perform the installation services in a professional and workmanlike manner. Unless otherwise expressly provided for herein, Authorized Service Provider will obtain required permits and provide permit numbers if required.

Customer: will identify any property lines, easements, covenants, underground or overhead utility lines, pre-existing physical or environmental hazards, building code violations or other legal encumbrances that could affect the installation services prior to the installation. Customer shall keep posted permits on display at all times. Customer is responsible for any delays or interference caused to installation by Customer or third party under Customer's direction or control.

Changes and Change Orders: Any changes to the installation, including but not limited to changes necessitated by undisclosed, unidentified or unforeseen conditions on the site, are subject to a written Change Order signed by Customer and The Home Depot and any additional products or services included in such Change Order will be paid for in full before any such change is made. The Home Depot or Authorized Service Provider has no obligation to attempt to remediate any such conditions and may immediately discontinue the installation or ask for a Change Order. Please note, The Home Depot or Authorized Service Provider will not remediate any mold, asbestos and lead-based paint. Neither The Home Depot nor the Authorized Service Provider is responsible for delays caused by events beyond either party's control including but not limited to acts of nature, governmental actions, delivery delays or damages caused by third parties, labor strikes, Customer's credit or financing, or any incorrect information or non-compliance with this Agreement by Customer.

Liens; Security Interests: If Customer makes all payments as required under this Agreement, no security interest will be placed against Customer's property by The Home Depot. After paying on any completed distinct phase of the installation, Customer may request from Authorized Service Provider a signed lien release and waiver of any right to place any claim against Customer's property applicable to the work then completed. Customer should also refer to the State Supplement for specific State requirements, if any.

LIMITED WARRANTY: TO THE EXTENT PERMISSIBLE UNDER APPLICABLE LAW, THE HOME DEPOT WARRANTS THE WORKMANSHIP OF THE INSTALLATION FOR ONE (1) YEAR FROM ITS COMPLETION DATE. PROVIDED CUSTOMER NOTIFIES THE HOME DEPOT DURING THE WARRANTY PERIOD, THE HOME DEPOT WILL ARRANGE FOR REPAIR AT NO CHARGE TO CUSTOMER FOR ANY DEFECTS DUE TO FAULTY WORKMANSHIP. THE HOME DEPOT'S WARRANTY DOES NOT COVER DAMAGE CAUSED BY ACTS OF GOD, INSTALLATION OR REPAIRS MADE BY PERSONS OTHER THAN THE HOME DEPOT OR AUTHORIZED SERVICE PROVIDER, ABUSE, MISUSE, NEGLECT, OR NORMAL WEAR AND TEAR. MERCHANDISE AND MATERIALS ARE COVERED EXCLUSIVELY BY THE MANUFACTURER'S WARRANTY, IF ANY. THIS LIMITED WARRANTY GIVES CUSTOMER SPECIFIC LEGAL RIGHTS AND CUSTOMER MAY ALSO HAVE OTHER RIGHTS THAT MAY VARY FROM STATE TO STATE.

WAIVER OF CERTAIN DAMAGES: EACH OF CUSTOMER AND THE HOME DEPOT HEREBY WAIVES ANY CLAIMS AGAINST THE OTHER FOR LOST USE, LOST PROFIT, LOST REVENUE, INDIRECT, INCIDENTAL OR CONSEQUENTIAL DAMAGES RELATING TO THE INSTALLATION, THE MATERIALS OR SERVICES OF THE HOME DEPOT OR OF AUTHORIZED SERVICE PROVIDER OR THIS AGREEMENT. TO THE EXTENT CUSTOMER'S STATE DOES NOT ALLOW THE EXCLUSION OR LIMITATION OF INCIDENTAL OR CONSEQUENTIAL DAMAGES, THIS SECTION MAY NOT APPLY.

Termination: If Customer breaches this Agreement or declines a reasonable Change Order request, The Home Depot may immediately terminate the Agreement without further obligation. In the event of such termination, Customer agrees to pay The Home Depot the costs of materials, labor, expenses and services provided by The Home Depot or Authorized Service Provider through the date of termination, plus any other amounts set forth in this Agreement or allowed under applicable law. THE HOME DEPOT MAY WITHHOLD AMOUNTS OWED TO THE HOME DEPOT FROM THE DOWN PAYMENT OR OTHER PAYMENTS MADE, WITHOUT LIMITING THE HOME DEPOT'S OTHER REMEDIES FOR RECOVERY OF SUCH AMOUNTS.

Acknowledgment: If Customer's purchase includes Countertop installation, Customer acknowledges and agrees that Customer has received and understands the following additional documentation: (a) Countertop installation: What to Expect; and (b) Product Specification Sheet. The Home Depot, via third party, offers Extended Protection Plans on some products. Customer may receive marketing materials on The Home Depot's behalf concerning such Extended Protection Plans.

The Home Depot Special Services
Will Call/Direct Ship/Delivery

Returns: Except where prohibited by law, all returned Special Order Merchandise is subject to a fifteen percent (15%) restocking fee. Custom made goods are not returnable.
Will Call: The Home Depot Store will call the number provided on the invoice when your order is available. A Will Call held at the store for over thirty (30) days shall be subject to the abandoned property laws in your state.
Direct Ship: Direct Ship merchandise will be sent by the vendor and/or manufacturer to the address on the invoice.
Delivery: The Home Depot shall arrange for its delivery agent to deliver the merchandise to the address identified on the invoice pursuant to the following terms and conditions:
Roads Notice: The delivery address must be accessible by vehicle over roads and bridges rated to handle up to and including (40) forty ton loads. If any portion of delivery agent's route must traverse a section of road that is not rated to handle a forty ton load or heavier, Customer will be responsible for seeking a waiver, at Customer's expense, from the appropriate governmental authority. If Customer is unable to obtain a waiver, delivery service will not be available to the delivery address.
Unattended Drop: **If Customer will not be present to accept the delivery, and the delivery can be left unattended, please initial below:**
_____ By initialing here, I authorize The Home Depot and its delivery agent to leave the merchandise unattended following delivery, and I accept full responsibility for any resulting loss of, or damage to, the merchandise.
Outside Deliveries Only: If you are purchasing merchandise designated by The Home Depot for ***outside delivery*** only, your purchase **does not** include delivery of the merchandise beyond curbside; however, additional services may be available to deliver the merchandise to a location that you designate. In that event, you will be presented with the following waiver at the time of delivery, which you must sign as a condition of receiving any additional delivery services:

> In consideration of the delivery of the merchandise that I purchased from The Home Depot ("Merchandise") to a location designated by me at my request, I, _____, on behalf of myself and my agents, successors, and assigns, hereby **RELEASE AND FOREVER DISCHARGE, WITHOUT CONDITIONS,** Home Depot U.S.A., Inc. and its affiliates, employees, officers, directors, managers, agents, contractors and any other person working through or under it (hereinafter collectively "The Home Depot"), from any and all claims, causes of action, demands, liabilities, damages, costs and expenses, of every kind and nature, whether known or unknown, suspected or unsuspected, which exist now or in the future (hereinafter "Claims"), relating and/or arising out of the delivery of the Merchandise. **I FURTHER EXPRESSLY, FULLY, AND UNCONDITIONALLY ASSUME ANY AND ALL RISKS AND FULL LIABILITY FOR ANY RESULTING PERSONAL INJURY, DAMAGE TO PROPERTY OR DAMAGE TO MERCHANDISE WHICH MAY GIVE RISE TO CLAIMS AGAINST ME AND/OR THE HOME DEPOT. I HAVE FULLY INFORMED MYSELF OF THE NATURE OF THE RISKS INHERENT IN THE DELIVERY OF THE MERCHANDISE AND VOLUNTARILY AGREE TO ALLOW DELIVERY OF THE MERCHANDISE ONTO MY PREMISES. I HAVE CAREFULLY READ AND COMPLETELY UNDERSTAND THIS RELEASE AND ASSUMPTION OF RISK FORM BEFORE SIGNING IT.** This agreement shall become effective upon my signature and shall be governed by the laws of the State of Georgia.

If you choose not to utilize additional delivery services beyond curbside delivery, you will not be required to sign the above waiver.

Accepted by:

X_____ 01/18/2017
Customer's Signature **Date**

Cover Page

City of Santa Fe Community Development Block Grant Program FY 2017-2018	
Name of Nonprofit Organization:	Santa Fe Recovery Center
Name of Executive Director:	Sylvia Barela
Name of Board President:	Martin Laurent
Name, Contact Information (Address, Phone, and Email) of Person Submitting Request (Fiscal Agent if appropriate):	Sylvia Barela 4100 Lucia Lane Santa Fe NM 87507 505 471-4985 ext. 108 sbarela@sfrecovery.org
Amount Requested:	
Program Name or Service being requested for Funding:	Santa Fe Recovery Center Residential Treatment Program Facility Upgrade
Brief Program or Service Description:	Santa Fe Recovery Center is requesting funding for some necessary upgrades to its HVAC system to improve air flow, improve air quality, and improve filtration system and an upgrade to the medical office of our residential program.
Check which Category Describes your organization: 8. Private Non-Profit 9. For Profit 10. Public Agency 11. Government Agency	Santa Fe Recovery Center is a Private Non-Profit
DUNS or CAGE #	083216838
Business Registration #	17-00105226
Tax ID #	85-0216976
State CRS #	01-778794-00-7
Check One:	☒ Previous Recipient ☐ New Applicant
Funding Categories to be Addressed (Circle one):	☐ Housing ☑ Public Facility ☐ Public Service

Project Proposal Summary
(If funded, the following will be written into the contract Scope of Services with Accomplishment Levels along with details provided in Section A)

Activity Name	Santa Fe Recovery Center Residential Upgrade
Brief Summary of the activity	Santa Fe Recovery Center is asking for funding to do needed Maintenance on its HVAC system. The system needs renovation to include rebuilding filter holders in the furnaces and work on the return air vents in the floor, which are collapsing. Additionally, we would like to do some much needed renovation to our medical office to include fixing chipped counter tops and re-doing the floor, which has chips and gouges in the linoleum tile.

Amount of CDBG funding requested for Activity	$ 50,000
Total Budget for Activity	$ 50,000

To the best of my knowledge and belief, all data in this application is true and correct. If funded, I certify that the Applicant Organization is willing and able to adhere to the polices and procedures specified by the City of Santa Fe and all applicable program regulations of the US Department of Housing and Urban Development. Further, I understand there is not an agreement until the City of Santa Fe and the individual authorized to execute contracts on behalf of the Applicant Organization has signed the contract.

Sylvia Baca — CEO — 2/1/17

Authorized Signature *(sign in **blue** ink)* — Title — Date

CDBG funds can be used for specific Eligible Activities as outlined in the Overview. Select one type of Eligible Activity category that best describes your Project.

Type of Eligible Activity (check one)

Activities Related to Housing	
Other Real Property Activities	
Public Facilities/Improvements	X
Public Service	

A. Activity to be funded

A1. Briefly describe the Activity you are requesting to fund with CDBG. This will help determine eligibility.

We are asking for funding to conduct some necessary renovation of the HVAC system and medical office of our residential building. The first renovation being proposed is a rebuilding of the return air vents in the floors in the client bedrooms and common areas, which over time have been collapsing. Our maintenance person has maintained them to the extent possible, but it is now being recommended by HVAC companies that have looked at the vents that they be re-built. Additionally, when the HVAC company that installed our furnaces did the work, they did not leave enough space for the filters to be properly placed underneath them. Therefore, the filters to not fit well into the furnaces and have to be replaced often and are not doing their job as well as they should. As such, it is being recommended that we lift the furnaces to create space for a two inch register to hold the filters. The final piece of renovation that we are requesting funds for is to replace the counter tops and flooring in our small medical office. This office is used 24 hours a day 7 days a week and the floors and counter tops are chipped and gouged.

A2. Why is this Activity needed? Does it address a gap? Describe the degree of need, or the severity of a problem including cause, extent, location, frequency and duration that will be addressed by the project. Provide a description of service gaps the activity fills in the community. Additionally, supply data, such as demographics, reports and/or other information supporting your information and proving the need exists. **(Attach additional pages, if necessary)**

Santa Fe Recovery Center (SFRC) is a private non-profit substance use disorder treatment program providing residential, outpatient, and medication assisted treatment services in the city of Santa Fe. We are the only residential substance use disorder program in Santa Fe. We help to address the gap in accessible addiction treatment services in this community for low income individuals. We provide these services to 600 clients and their families each year, 95% of which have low to moderate incomes. New Mexico consistently rakes among the highest states for opiate overdose rates per capita, the abuse of illicit drugs, and alcohol related deaths. We also rank high for states where individuals need but are not receiving substance use disorder treatment services. SFRC's main building that houses our administration and our residential treatment program is 25 years old and requires constant maintenance and upgrades. Some of those upgrades exceed the recovery center's maintenance budget. This funding would assist us with upgrades that would increase air quality within the facility, increase the quality of our HVAC system, and increase the morale and comfort of our clients and staff.

A.3 If applicable, what steps or phases will be taken to complete the Activity (provision of services, engineering/design, advertising, bidding, contract award, construction, etc.)?

The phases or steps involved in completion of this activity include taking the existing bids and cost estimates for these three tasks and ensuring that we have three bids for each activity and then ensuring that we choose the contractor most qualified to complete the tasks. We would ensure that any and all contractors have the appropriate SAMS registrations, are able to provide necessary documentation for Davis Bacon Wages, and then we will ensure that work is completed in a timely manner.

A.4 Describe the population that the Activity will serve and how this population will be served. Describe the outreach and recruitment activities which will be conducted to make the proposed activity services known and accessible to the targeted population. Please include where these outreach and recruitment activities will take place.

SFRC provides services to 600 clients annually. 95% of these clients have low to moderate income. Typically 50-60% of our clients are residents of Santa Fe. Two thirds of our client population is male, 60% are Hispanic, 35% are While, not of Hispanic origin, and 5% are Native American. SFRC engages in recruitment activities including presentations to judges, Christus St. Vincent's hospital and other local provider agencies to educate these referral sources regarding our programs. Additionally, SFRC advertises online through google and via our website. We also participate in awareness building events at the Friendship Club, Legislature, and local health fairs.

A.5 Estimate the number of total persons / households that will benefit from the CDBG funded portion of this Activity: (Fill in Households OR Persons depending on the type of Activity you are providing).

Total number of clients you anticipate serving:			
Households:	**OR**	Persons:	600

A.6 Use the following Table 1 to break out the number of persons you anticipate serving at the low (30-50% AMI) and very low-income (< 30% AMI) levels and the type of client (Refer to overview of CDBG program for the most recent income amounts). Along with income, please anticipate the number of clients that are severely disabled adults, homeless persons, abused children, battered spouses, and illiterate adults, persons with AIDS, migrant farm workers, and elderly. (All of these clients fall under the presumed benefit categories as defined by CDBG and therefore, all under low or extremely low income). This would apply mainly to Public Service or Public Facilities/Improvements Activities.

Table 1

Extremely Low Income (<30% AMI)	Low Income (31-50%)	Moderate Income 51-80%	Illiterate adults	Abused children	Severely Disabled Persons	Migrant Farm Workers	Elderly	Persons with AIDS	Homeless Persons
380	120	100	100					10	125

A.7 Use the following Table 2 to breakout the number of households you anticipate serving at the income levels listed. (Refer to the 2016 AMI table on pg. 18 for the most recent income amounts). This would apply mainly to CDBG funding for housing projects such as Down Payment Assistance and Rehabilitation Activities.

Extremely Low Income (<30% AMI)	Low Income (31-50%)	Moderate Income (51-80%)	Non-low Moderate Income (81-100%)	Female Head of Household
380	120	75	25	75

Table 2

A.8 CDBG funded construction activities must be in compliance with local land use plans and zoning. Explain how the proposed activity conforms to local plans and zoning ordinances. Provide a copy of the page(s) of resource document(s), pertinent sections, and page(s). This only applies to projects where the CDBG funds will used for the actual construction, not acquisition.

This project does conform to local plans and zoning ordinances and all appropriate permits will be obtained prior to any work being performed.

A.9 Please describe the organization in terms of its administrative capacity and its qualifying experience and length of experience with activities or projects similar to the proposed Activity. Include purpose, goals, programs, activities, clients, and accomplishments, if any, in the area of activity for which funding is requested. Give examples of and list experience.

SFRC has the administrative capacity for this program as it will be managed by the facility's CEO under the direction of the Board of Directors. The leadership of the program is familiar with projects requiring Davis Bacon Wages and with construction and improvement projects. This would be our fourth Davis Bacon construction/renovation project. Our previous projects include working with Santa Fe County on the construction of our outpatient building using capital outlay funds. We also upgraded the accessibility of our parking lot and replaced the windows in our residential building, two CDBG funded projects that utilized Davis Bacon Wages. The purpose and goal of this project is to upgrade the facility and provide a better level of care for the 250 clients we serve each year in our residential facility and a better working environment for our staff.

A.10 : Briefly describe your organizations experience in government contract administration, and knowledge of federal regulations governing acquisition, procurement, equal employment opportunity, and labor standards.

SFRC engaged in procurement and labor standard compliance when participating in County construction and CDBG funded projects 3 times in the past 6 years. SFRC has knowledge of federal regulations governing acquisition and equal employment opportunity through meeting federal accreditation standards and through managing grant projects for previously granted funds from the County, City, and Federal programs.

B. National Objective Compliance

B.1 Identify which of the following National Objectives this Activity will address (check only one):

(Note that the National Objectives are explained in the Overview and only one can apply to your project as it relates to the Eligible Activity) Discussion will take place at the Pre-App meeting to help with explanations and definitions.

1. Benefits Low/ Moderate Income persons/households by:	
Area Benefit (eligible area) (LMA)	
Limited Clientele (LMC)	X
Housing Activities (LMH)	
Job Creation or Retention (LMJ)	

B.2 Is the service area city wide: (X) yes ( )no
If no, fill out B.3.

B.3 If an activity is based on an area benefit, identify the Census Tract(s) and Block Group(s) that will be served. Make sure to read the Overview for a clear understanding of the requirements of an area benefit. Attach a map of the area.

Census Tract	Block Group	Total Population	Low/Mod Income Population	% Low/ Mod Income
Total				

B.4 Explain fully how the proposed project meets the CDBG National Objective selected above. Provide substantiating documentation supporting the claims. Refer to Overview for more detail.

This project meets the National Objective of benefiting low/moderate income persons/households with the sub-category of limited clientele. SFRC serves adults struggling with addictions to drugs and alcohol. More than 51% of SFRC's clientele are low/moderate income. The funding utilized in the Residential and Outpatient program has income eligibility requirements, and to quality, clients must show proof of income. Most of our clients are unemployed and many are homeless indicating that they have little to no income.

C. Consolidated Plan Compliance

The City of Santa Fe provides guidance in its 2013-2017 Consolidated Plan on funding uses, whether Federal, State, City, or Private. In accordance with federal regulations, each project must be consistent with the priorities outlined in the City's Consolidated Plan. (See Consolidated Plan on City website) Mark the one priority that the proposed project will meet.

(see attached pages)

P-25 Priority Needs

Check	Priority Need Name	Priority Level	Population Served	Goals Addressed
	Rental Vouchers	High	Extremely low-income renters; people at risk of being homeless; persons with disabilities; homeless youth; veterans; elderly; families in transition; persons with HIV/AIDS and their families; public housing residents; mentally ill; chronic substance abusers; victims of domestic violence	Reduced rate of cost burden and corresponding drop in poverty rate for homeless households and those in danger of becoming homeless. *(Increase Opportunities for At Risk Populations);* Inventory of rental units and vouchers expanded to meet increased demand *(Increase Affordable Housing Opportunities)*
	Emergency Shelter (note could be classified as Public Service which is restricted in allocation amount)	High	Extremely low-income residents; chronic homeless; homeless youth; veterans; families in transition; mentally ill; chronic substance abusers; victims of domestic violence	Reduced rate of cost burden and corresponding drop in poverty rate for homeless households and those in danger of becoming homeless. *(Increase Opportunities for At Risk Populations)*
X	Support Services for Homeless or People at Risk of Homelessness (note could be classified as Public Service which is restricted in allocation amount)	High	Extremely low-income renters; people at risk of being homeless; persons with disabilities; homeless youth; veterans; elderly; families in transition; persons with HIV/AIDS and their families; public housing residents; mentally ill; chronic substance abusers; victims of domestic violence	Reduced rate of cost burden and corresponding drop in poverty rate for homeless households and those in danger of becoming homeless. *(Increase Opportunities for At Risk Populations)*
	Refinancing Services and Support for Current Homeowners	High	Low-income homeowners; homeowners in risk of foreclosure; homeowners in substandard housing	Reduced rate of cost burden and corresponding drop in poverty rate for homeless households and those in danger of becoming homeless. *(Increase Opportunities for At Risk Populations);* Increased homeownership opportunities and support for long term affordability and accessibility for current homeowners. *(Increase Affordable Housing Opportunities)*

Priority Needs (cont.)

Check	Priority Need Name	Priority Level	Population Served	Goals Addressed
	Homeowner Rehabilitation Programs, Energy-efficiency Upgrades, Accessibility Retrofits	High	Low- and moderate-income homeowners; residents in redeveloping or transitioning neighborhoods; homeowners living in aging or substandard housing stock; seniors who need to "age in place;" people with disabilities	Increased homeownership opportunities and support for long term affordability and accessibility for current homeowners. *(Increase Affordable Housing Opportunities);* Housing opportunities reflect emerging needs, changing demographics and are aligned with redevelopment projects, economic development objectives and sustainability goals *(Address Emerging and Current Needs and Changing Demographics)*
	Construction of affordably-priced homes for homeownership	Low	Low- and moderate-income homebuyers and current renters; local workforce	Increased homeownership opportunities and support for long term affordability and accessibility for current homeowners. *(Increase Affordable Housing Opportunities)*
	Fair Housing Outreach	High	Low- and moderate-income renters; low-income landlords; persons with disabilities; Spanish speakers; large families; general public	Housing opportunities reflect emerging needs, changing demographics and are aligned with redevelopment projects, economic development objectives and sustainability goals *(Address Emerging and Current Needs and Changing Demographics)*
	Diversity of Housing Types	Low	Low- and moderate-income renters; seniors; small households; entrepreneurs; aging veterans; entrepreneurs and other self-employed	Housing opportunities reflect emerging needs, changing demographics and are aligned with redevelopment projects, economic development objectives and sustainability goals *(Address Emerging and Current Needs and Changing Demographics)*
	Non-Housing Community Facilities and Services	High	Low- and moderate-income residents; residents in redeveloping or transitioning neighborhoods; youth	Housing opportunities reflect emerging needs, changing demographics and are aligned with redevelopment projects, economic development objectives and sustainability goals *(Address Emerging and Current Needs and Changing Demographics)*

Priority Needs (cont.)

Check	Priority Need Name	Priority Level	Population Served	Goals Addressed
	Provision of Rental Units and Support Services for LI/ VLI Renters	High	Low- and very low-income renters; persons transitioning out of homelessness; renters in need of support services; public housing residents	Inventory of rental units and vouchers expanded to meet increased demand *(Increase Affordable Housing Opportunities);* Housing opportunities reflect emerging needs, changing demographics and are aligned with redevelopment projects, economic development objectives and sustainability goals *(Address Emerging and Current Needs and Changing Demographics)*
	Rental Rehabilitation	Low	Low- and moderate-income renters; low-income landlords; residents of low- income neighborhoods that are redeveloping or in transition; public housing residents	Inventory of rental units and vouchers expanded to meet increased demand *(Increase Affordable Housing Opportunities);* Housing opportunities reflect emerging needs, changing demographics and are aligned with redevelopment projects, economic development objectives and sustainability goals *(Address Emerging and Current Needs and Changing Demographics)*
	Down Payment Assistance	High	Low- and moderate-income residents who are "buyer ready"; first responders (fire, police, etc.)	Increased homeownership opportunities and support for long term affordability and accessibility for current homeowners. *(Increase Affordable Housing Opportunities)*
	Homebuyer Training & Counseling	High	Low- and moderate-income homebuyers; current renters	Increased homeownership opportunities and support for long term affordability and accessibility for current homeowners. *(Increase Affordable Housing Opportunities)*

D. Budget

D1. Describe the Proposed Budget for this Activity. *Please explain all budgeted* expenses including contractual services, personnel services, commodities, and capital outlay. Also explain what the CDBG funds will be used for. Also explain the effect of not receiving any or only a portion of a CDBG allocation has on the project budget.

The proposed budget for this activity includes contractual services to address the specific upgrade/renovation projects necessary to address problems with the HVAC system and to upgrade the medical office. Based on the bids we have obtained and the cost analysis that our maintenance contractor has done, it will cost approximately $30,000 to rebuild the return air vents in the residential client bedrooms and common areas. It will cost approximately $7,000 to lift the furnaces and install 2 inch registers for filters, and it will cost approximately $13,000 to replace the counter tops and floor in the medical office. If we receive a portion of this funding, we will prioritize the projects and utilize the funding we receive to accomplish as many of the projects as possible. If necessary, we could rebuild only the return air vents that are in the worst condition.

D.2 Please complete the following table to identify the funding sources and amounts. Indicate total project cost that incorporates the total CDBG request and what funds or services, if any, the sponsor and/or other agencies will contribute. Also enter other ***committed*** funding sources (committed funds are funds available or will be available to fund the Activity during the CDBG Fiscal Year). Please be as accurate as possible. Should your organization be awarded funding, a revised budget (as needed) will become an Addendum to the CDBG Contract.

Type of funding	Source/amount	Source/amount	Source/ amount	Totals
Requested CDBG amount				**$50,000**
Other HUD funds i.e. HOME, Section 108				$
Other Federal Funds				$
City Funding i.e. Youth and Family, Human Services				$
State funding, i.e. MFA				$
Other i.e. in- kind, private funds				$
Total of all funding sources				**$50,000**

D.3 If you are proposing to utilize CDBG funds to pay for staff costs, please list each position title and the percentage of their salary and benefits that will be funded by CDBG. Depending on the Activity, listing this information does not guarantee the position will be funded by CDBG as it may not be eligible.

PERSONNEL Position Title	New (Y/N)	% salary & benefits paid for with CDBG

E. Performance Measurement System/Work Plan

CDBG/ Work Plan - FY 2016-2017

Provide the performance measurement goals, objectives and outcomes for your proposed CDBG project. Please refer to the Overview of the CDBG Program on page 14. Also, please attach a Work Plan for your project. The Work Plan should describe the goals, objectives and outcomes in greater detail and be:

1. Specific
2. Measurable
3. Achievable
4. Results-orientated
5. Time bound

Goals: BENEFIT LOW INCOME INDIVIDUALS/HOUSEHOLDS:

Improve the quality of care and physical environment of SFRC's residential program for clients and staff through upgrades to the return air vents, furnace filters and medical office. This goal will support services for homeless and people at risk of homelessness as this is the client. population SFRC serves.

Objectives: CREATE SUITABLE LIVING ENVIRONMENTS by increasing air quality through return air vent upgrades and furnace filter upgrades and increase the physical environment of the medical office for clients and staff.

Outcomes: AVAILABILITY/ACCESSABILITY: Improved air quality, and long term viability of SFRC's main building and therefore the agency's operations. This will ensure the availability, quality, and sustainability of substance abuse treatment services to more than 600 low income individuals struggling with addictions to drugs and alcohol on an annual basis.

Indicators:

- Number of persons assisted
- Income levels of persons by household by <30%, 30-49%, 50-79% and ≥80% of area median income (AMI)

- Race, ethnicity and disability data when programs directly benefit persons or households

- Public Facilities and Improvements
    - Total Persons Assisted:
    - Of the total Persons, Number of:
    - With New Access to this type of Public Facility or Infrastructure Improvement
    - With Improved Access to this type of Public Facility or Infrastructure Improvements
    - With access to Public Facility or Infrastructure that is No Longer Substandard

Husky Refrigeration HVAC & Mechanical
4519 Contenta Ridge Rd
Santa Fe, NM 87507
(505)920-5698
huskyrefrigeration505@gmail.com
http://Huskymechanicalnm.com

ADDRESS
Santa Fe Recovery Center
4100 Lucia Lane
Santa Fe, NM 87507

ESTIMATE # 1272
DATE 01/25/2017

	QTY	RATE	AMOUNT
Services Raise 4 furnaces inside mechanical room. We will have to get removed Refrigerant from each unit, we will recover Refrigerant p, cut off refrigeration line set, to remove entire AC coil and furnace. We will remove gas line, drain line, cut off supply duct work to raise entire unit, once units are remove we will install a 2" filter rack to be able to access filters a lot easier. Once furnace and AC coil are put back in place, we will re due 5" flue pipe, drain line, supply duct work, weld refrigeration lines back an, pulled vacuum and each unit, recharged was unit with new Refrigerant as recommended charge for each unit. And test for proper operation.	1	1,728.00	1,728.00T
Part R22 Refrigerant 24 lbs $720.00 Copper fittings 3/8" & 7/8" qty 4 of each $46.00 Weld and vacuum $65.00 Recover refrigerant and dispose $85.00 Sheet metal $85.00 Duct seal, screws, tape, $34.00 2" filter rack qty 4 $444.00 Please note, if customer wants to re uses same Refrigerant price estimate will be $720.00 less, we highly recommend using new Refrigerant and recharged, as name plate requires.	1	1,394.00	1,394.00T

SUBTOTAL	3,122.00
TAX (8.3125%)	259.52
TOTAL	**$3,381.52**

SYLVIAS COPIES

Vinyl Tile	229 Sq Ft	$1,072.65

Line #		Materials	Assigned Rooms		Pricing	
1	IMAGE UNAVAILABLE	SKU: 107-971 / 12012 Allure Cherry $1.69 / Sq Ft **Support Materials:** Quarter Round: Unfinished	Home Office Other 1(OFFICE-STORE ROOM)	158 Sq Ft 70 Sq Ft	Materials*: Labor**:	$459.60 $613.05

Asbestos Testing over 160 sf
Removal of vinyl $1.85 sf
Silicoat $1.55 sf
Embossing $1.50 sf

Subtotal:**$1,072.65**

***Materials Included: Vinyl Tiles, Quarter round**
****Labor Included: Delivery, Quarter round installation**

Total Estimate (229 Sq Ft): $1,072.65

F PAID IN
MONTHS*

6 MONTHS

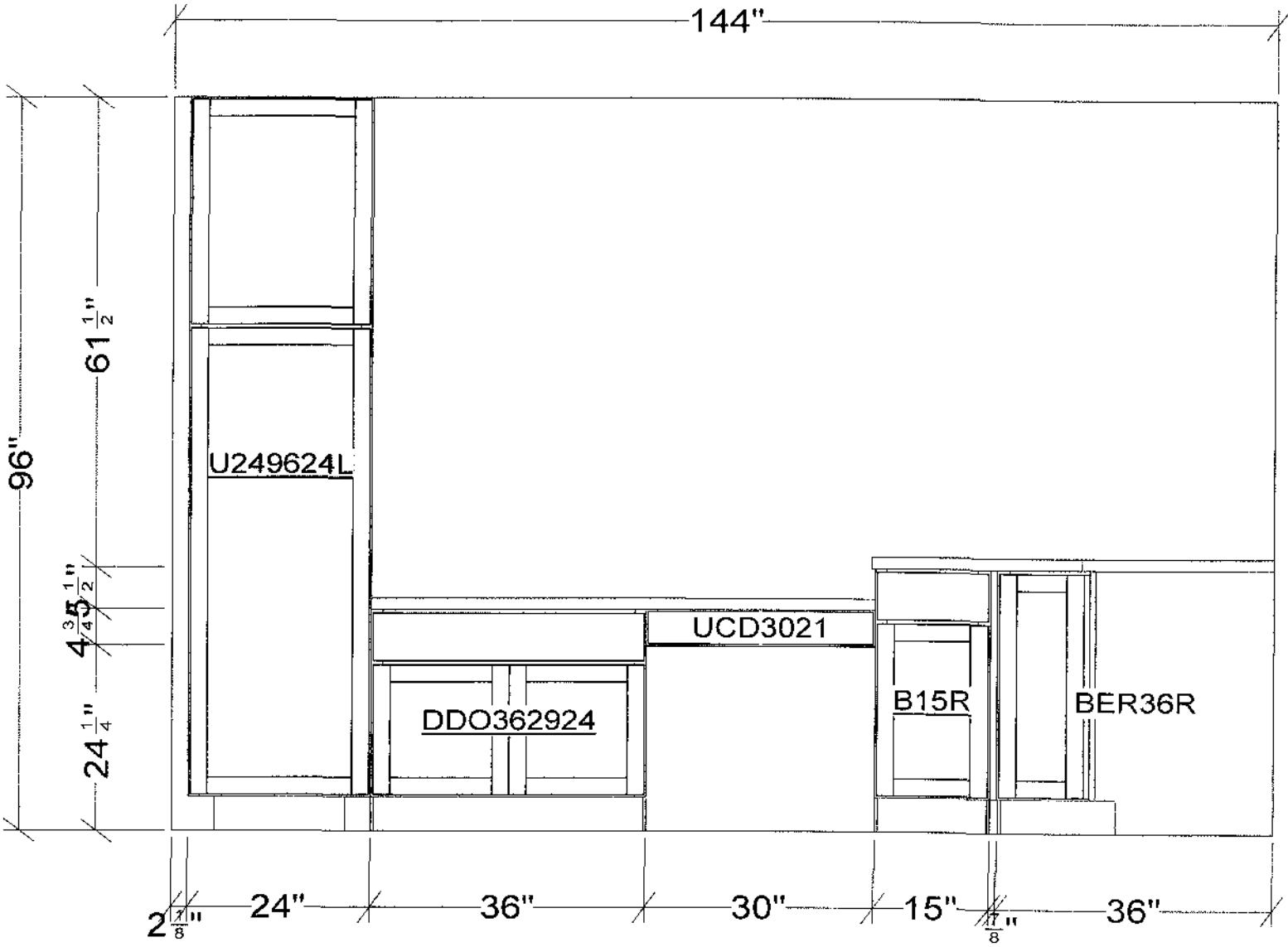
ll be charged to your account from the purchase emiums for optional credit insurance) is not paid

ENTS
PER MONTH*

vould pay the purchase amount listed above

*With credit approval for qualifying purchases made on The Home Depot or EXPO Design Center Consumer Credit Card, 17.99% - 26.99% APR. Minimum interest charge: $2. See card agreement for details including APR applicable to you. Offer is only valid for consumer accounts. 6 months everyday credit offer is subject to change without notice. Minimum payments required. Offer only valid at homedepot.com and in The Home Depot retail stores. The suggested monthly payment stated is only an estimate based on listed purchase amount excluding sales tax, is rounded to the next highest dollar amount and does not include additional payments that may be required for an existing balance or future purchases. In order to pay your promotional balance by the end of the period, you may have to make a payment each month that is higher than your required minimum payment.

Pricing is an estimate only, final price is determined by the results of the measure and the final material selection. Additional charges may apply when the existing flooring is removed due to unforeseeable conditions (e.g. damage or deterioration). Please use this estimate as a guide to determine if the installation scope and materials are within your price range



All dimensions ,size designations given are subject to verification on job site and adjustment to fit job conditions.	THE HOME DEPOT	This is an original design and must not be released or copied unless applicable fee has been paid or job order placed.	Designed: 1/18/2017 Printed: 1/18/2017
11800813.kit		El 1	Drawing #: 1 | No Scale.

QUOTE

Store 3501 EUBANK
200 EUBANK BLVD SE
ALBUQUERQUE, NM 87123

Phone: (505) 271-1900
Salesperson: LKI2EA
Reviewer: LKI2EA

 No. H3501-42607

SOLD TO

Name: **TAFOYA DUANE**
Phone 1: **(505) 344-3960**
Address: 1909 BRYN MAWR PL NE
Phone 2: (505) 803-2414
Company Name:
City: ALBUQUERQUE
Job Description: martha cabinets
State: NM Zip: 87106 County: BERNALILLO

QUOTE

2017-01-18 13:06

Prices Valid Thru: 01/18/2017

VENDOR DIRECT SHIP #1

MERCHANDISE AND SERVICE SUMMARY

We reserve the right to limit the quantities of merchandise sold to customers

TO: CUSTOMER

S/O - MERCHANDISE TO BE SHIPPED: **S/O MARTHA STEWART LIVIN** **REF # S01** **ESTIMATED ARRIVAL DATE: 02/22/2017**

REF #	SKU	QTY	UM	DESCRIPTION	PI	TAX	PRICE EACH	EXTENSION
S0101	0000-824-509	1.00	EA	U249624L / U249624L UTILITY 24W 96H 24D LH / U249624L FSIDES:B HINGES:L	A	Y	$986.77	$986.77
S0102	0000-824-509	1.00	EA	FPEB-T / FPEB-T FLUSH FURNITURE PLYWOOD ENDS / ATT:U249624L FPEB-T FSIDES:B	A	Y	$193.54	$193.54
S0103	0000-824-509	1.00	EA	DDO362924 / DDO362924 DESK DR DRW 36W 29H 24D / DDO362924 FSIDES:R HINGES:B	A	Y	$352.28	$352.28
S0104	0000-824-509	1.00	EA	FPEB-B / FPEB-B FLUSH FURNITURE PLYWOOD ENDS / ATT:DDO362924 FPEB-B FSIDES:B	A	Y	$123.47	$123.47
S0105	0000-824-509	2.00	EA	UCD3021 / UCD3021 UNDER COUNTER DRW 30W 21D / UCD3021 HINGES:B	A	Y	$182.10	$364.20
S0106	0000-824-509	1.00	EA	B15R / B15R BASE 15 DRW RH / B15R FSIDES:B HINGES:R	A	Y	$253.13	$253.13
S0107	0000-824-509	1.00	EA	FPEB-B / FPEB-B FLUSH FURNITURE PLYWOOD ENDS / ATT:B15R FPEB-B FSIDES:B	A	Y	$123.47	$123.47
S0108	0000-824-509	1.00	EA	BER36R / BER36R BASE EASY REACH 36 RH / BER36R FSIDES:L HINGES:R	A	Y	$496.24	$496.24
S0109	0000-824-509	1.00	EA	B18L / B18L BASE 18 DRW LH / B18L FSIDES:R HINGES:L	A	Y	$264.09	$264.09
S0110	0000-824-509	1.00	EA	FPEB-B / FPEB-B FLUSH FURNITURE PLYWOOD ENDS / ATT:B18L FPEB-B FSIDES:B	A	Y	$123.47	$123.47

*** CONTINUED ON NEXT PAGE ***

NOT VALID FOR MERCHANDISE CARRY-OUT

VENDOR DIRECT SHIP #1
(Continued)

TO: CUSTOMER

S0111	0000-824-509	1.00	EA	DDO362924 / DDO362924 DESK DR DRW 36W 29H 24D / DDO362924 FSIDES:L HINGES:B	A	Y	$352.28	$352.28
S0112	0000-824-509	1.00	EA	FPEB-B / FPEB-B FLUSH FURNITURE PLYWOOD ENDS / ATT:DDO362924 FPEB-B FSIDES:B	A	Y	$123.47	$123.47
S0113	0000-824-509	1.00	EA	DDR242924 / DDR242924 DESK DRW BASE 24W 29H 24D / DDR242924 FSIDES:R HINGES:B	A	Y	$418.07	$418.07
S0114	0000-824-509	1.00	EA	FPEB-B / FPEB-B FLUSH FURNITURE PLYWOOD ENDS / ATT:DDR242924 FPEB-B FSIDES:B	A	Y	$123.47	$123.47
S0115	0000-824-509	9.00	EA	NONE-DR / NONE-DR { NO DOOR PULLS } / NONE-DR HINGES:L	A	Y	$0.00	$0.00
S0116	0000-824-509	13.00	EA	NONE-DW / NONE-DW { NO DRAWER PULLS } / NONE-DW HINGES:L	A	Y	$0.00	$0.00
S0117	0000-824-509	3.00	EA	TB8WD14 / TB8WD14 TOE BOARD .25 WOOD / TB8WD14	A	Y	$17.64	$52.92
S01FR	0000-506-658	1.00		S/O FREIGHT SKU	A	Y	$250.00	$250.00

VENDOR - SPECIAL INSTRUCTIONS: LINE: MARTHA DSTYLE:SELECTED DOOR STYLE USTYLE:MAIDS-LAM-SQ TSTYLE:STANDARDDF WOOD:STANDARD FINISH:SHARK HDW:NONE-DR DSGNR:lki2ea

VENDOR WILL SHIP MDSE TO: TAFOYA DUANE

ADDRESS: 1909 BRYN MAWR PL NE **CITY:** ALBUQUERQUE

STATE: NM **ZIP:** 87106 **COUNTY:** BERNALILLO **SALES TAX RATE:** 7.312 **MERCHANDISE TOTAL:** $4,600.87

PHONE: (505) 3443960 **ALTERNATE PHONE:** **PAGER:**

END OF VENDOR DIRECT SHIP

INSTALLATION #1

REF # I19

BASIC INSTALLATION LABOR:

SKU	DESCRIPTION	QTY	UM	TAX	PRICE EACH	EXTENSION
0000-948 -948	WILSONART F&I POSTFORM LAMINATE-NAT/	0.00	SF	Y	$0.01	$0.00

OPTIONAL LABOR SELECTED INCLUDES:

OPTION	DESCRIPTION	QTY	UM	TAX	PRICE EACH	EXTENSION
3	POST FORM DECK GROUP C/GOLDEN ROMANO, 35-MIRAGE	48.00	SF	Y	$31.00	$1,488.00

*** CONTINUED ON NEXT PAGE ***

INSTALLATION #1
(Continued)

REF #I19

5	POST FORM EDGES GROUP B/BULLNOSE	19.00	LF	Y	$6.00	$114.00

INSTALLATION SITE NAME: TAFOYA, DUANE
ADDRESS: 1909 BRYN MAWR PL NE
CITY: ALBUQUERQUE **STATE:** NM **ZIP:** 87106
COUNTY: BERNALILLO **SALES TAX RATE:** 7.312 **TAX: Merchandise - Y** **LABOR - Y**
PHONE: (505) 8032414 **ALTERNATE PHONE:** (505) 8032414

INSTALL LABOR CHARGE:	$1,602.00
TRIP CHARGE:	$0.00
CREDIT FOR DEPOSIT/MEASURE:	$0.00
INSTALL TOTAL DUE:	$1,602.00

INSTALLER SPECIAL INSTRUCTIONS: golden romano desk application bullnose edge

BASIC INSTALLATION LABOR INCLUDES:

* 1 YEAR LIMITED WARRANTY ON WORKMANSHIP
* IN HOME INSPECTION TO VERIFY LAYOUT, MEASUREMENTS, SPECIAL INSTALLATION REQUIREMENTS AND TEMPLATING
* DELIVERY WITHIN 30 MILE RADIUS OF STORE
* FAUCET HOLE DRILLING (UP TO 4 HOLES)
* TWO (2) MITERED CUTS (ONE MITRED CORNER AND ASSEMBLED)
* APPLIED END CAPS
* ONE SINK OR COOKTOP CUTOUT (TOPMOUNT) PER PROJECT
* CAULKING ALL CONTACT POINTS (WITH COLOR MATCHED CAULKING)
* SECURING PENINSULA, KITCHEN AND VANITY TOPS
* SOLID BUILD UP WITH PARTICLE BOARD AS NEEDED
* FINAL INSPECTION WITH CUSTOMER INCLUDING INSTRUCTIONS ON CARE AND/OR TEST PRODUCT TO ENSURE PROPER OPERATION
* FINAL CLEAN UP OF ALL DEBRIS RELATED TO INSTALLATION

UNLESS STATED ABOVE THIS INSTALLATION DOES NOT INCLUDE:

CUSTOM EDGES ON BACKSPLASH

CUT AROUND POSTS OR ODD SHAPES (OTHER THAN SQUARE/NOTCH CUT OUTS)

LAMINATE APPLIED TO WALL

REMOVAL OF LAMINATE COUNTERTOP FASTENED FROM TOP DOWN INTO CABINETS. THIS IS A SUPPLEMENTAL CHARGE TO THE REMOVAL CHARGE ENSURING APPROPRIATE PRECAUTIONS ARE TAKEN TO NOT DAMAGE THE CABINETS THAT ARE FASTENED TO.

REMOVAL OF NON-LAMINATE COUNTERTOP FASTENED FROM TOP DOWN INTO CABINETS. THIS IS A SUPPLEMENTAL CHARGE TO THE REMOVAL CHARGE ENSURING APPROPRIATE PRECAUTIONS ARE TAKEN TO NOT DAMAGE THE CABINETS THAT ARE FASTENED TO.

WINDOW SILLS, GARDEN WINDOWS AND PASS THROUGHS

WORK ON SUNDAYS OR HOLIDAYS

MILEAGE BEYOND 60 MILES FROM STORE ONE WAY

SPECIAL NOTES:

* CHILDREN AND PETS MUST BE KEPT AWAY FROM THE WORK AREA
* AN ADULT OVER 18 YEARS OF AGE WITH THE AUTHORITY TO MAKE DECISIONS ABOUT YOUR INSTALLATION MUST BE PRESENT DURING THE INSPECTION (WHEN APPLICABLE), DELIVERY AND INSTALLATION

CUSTOMER MUST HIRE THEIR OWN CONTRACTOR TO MAKE THE REPAIRS.

* ALL BREAKABLES AND/OR VALUABLE OBJECTS MUST BE REMOVED FROM THE WORK AREA PRIOR TO INSTALLATION
* ADDITIONAL CHARGES AT THE JOBSITE MAY BE NECESSARY TO

*** CONTINUED ON NEXT PAGE ***

INSTALLATION #1
(Continued)

REF #I19

* CANCELLING APPOINTMENTS WITH INSTALLERS OR MISSING SCHEDULED APPOINTMENTS MAY LEAD TO ADDITIONAL CHARGES
* REFER TO PRODUCT MANUAL FOR SPECIFIC WARRANTY AND MAINTENANCE INFORMATION.
* IF UNFORESEEN LABOR IS NEEDED TO REPAIR DAMAGE FROM WATER, TERMITES, ELECTRICAL OR PLUMBING PROBLEMS, THERE IS AN ADDED CHARGE WHICH MAY NOT BE AVAILABLE FROM HOME DEPOT SO THE COMPLETE THE JOB AND/OR BRING THE INSTALL INTO COMPLIANCE WITH LOCAL AND/OR STATE CODES
* THE INSTALLER MAY DECLINE TO INSTALL THE JOB IF IN THEIR PROFESSIONAL OPINION IT SEEMS UNSAFE, IN VIOLATION OF STATE OR LOCAL CODES OR CANNOT BE PERFORMED TO INDUSTRY STANDARDS

END OF INSTALL #1

INSTALLATION #2

REF # I21

BASIC INSTALLATION LABOR:

SKU	DESCRIPTION	QTY	UM	TAX	PRICE EACH	EXTENSION
0000-133-441	CORIAN SOLID SURFACE-NAT/	0.00	SF	Y	$0.01	$0.00

OPTIONAL LABOR SELECTED INCLUDES:

OPTION	DESCRIPTION	QTY	UM	TAX	PRICE EACH	EXTENSION
8	EDGE DETAIL - GROUP C/BULLNOSE	19.00	LF	Y	$16.00	$304.00
177	*PROMO 1/12-1/29/17 NATL* 10% OFF SPECIAL BUY- GP A-C COLORSW/ 25 SF MIN PURCHASE. ORDER MUST B PAID BY 1/29-ADJUSTMENTSBY 4/23. COMBINABLE W/NATL/RGNL OFFERS. STANDARD FABRICATN/ NSTALLATION CHARGES APPLY. NO CREDIT APPLIED IF OFFER REFUSD/SANDSTONE	48.00	SF	Y	$35.10	$1,684.80

INSTALLATION SITE NAME: TAFOYA, DUANE
ADDRESS: 1909 BRYN MAWR PL NE
CITY: ALBUQUERQUE **STATE:** NM **ZIP:** 87106
COUNTY: BERNALILLO **SALES TAX RATE:** 7.312 **TAX: Merchandise** - Y **LABOR** - Y
PHONE: (505) 8032414 **ALTERNATE PHONE:** (505) 8032414

INSTALL LABOR CHARGE:	$1,988.80
TRIP CHARGE:	$0.00
CREDIT FOR DEPOSIT/MEASURE:	$0.00
INSTALL TOTAL DUE:	$1,988.80

INSTALLER SPECIAL INSTRUCTIONS: sandstone bullnose edge office application

BASIC INSTALLATION LABOR INCLUDES:

* IN HOME INSPECTION TO VERIFY LAYOUT, MEASUREMENTS, SPECIAL INSTALLATION REQUIREMENTS AND TEMPLATING
* FAUCET HOLE DRILLING (UP TO 4 HOLES)
* WALL SUPPORT CLEATS AS NEEDED AT CORNER CABINETS

***** CONTINUED ON NEXT PAGE *****

INSTALLATION #2
(Continued)

REF #I21

* BASIC INSTALLATION OF COUNTERTOP
* ONE SINK OR COOKTOP CUTOUT (TOPMOUNT) PER PROJECT
* GROUP A EDGE DETAIL
* EASED EDGE ON BACKSPLASH (ALL EXPOSED EDGES)
* FINISHED EXPOSED ENDS (FLAT FINISH NO EDGE DETAIL)
EXAMPLE: NEXT TO RANGE OR REFRIGERATOR
* SUBTOP OR SUPPORT STRIPS
* FINAL CLEAN UP OF ALL DEBRIS RELATED TO INSTALLATION
* DELIVERY WITHIN 30 MILE RADIUS OF STORE
* FINAL INSPECTION WITH CUSTOMER INCLUDING INSTRUCTIONS ON CARE AND/OR TEST PRODUCT TO ENSURE PROPER OPERATION

UNLESS STATED ABOVE THIS INSTALLATION DOES NOT INCLUDE:

WINDOW SILLS, GARDEN WINDOWS AND PASS THROUGHS
CABINET BUMP OUT
CUT AROUND POSTS OR ODD SHAPES
SUPPORT MATERIALS FOR OVERHANG (REQUIRED FOR OVERHANGS >6")
CUSTOM EDGES ON BACKSPLASH
REPAIR OR ALTERATIONS TO EXISTING CABINETRY
BORDER EDGES, DIFFERENT COLORS, DECORATIVE COLORS, DECORATIVE INLAYS
INLAY AROUND SINK (BEAUTY RING) SITS AT TOP OF INTEGRAL BOWLSINK AND BELOW DECK
MILEAGE BEYOND 60 MILES FROM STORE ONE WAY

SPECIAL NOTES:

* CHILDREN AND PETS MUST BE KEPT AWAY FROM THE WORK AREA FROM THE WORK AREA PRIOR TO INSTALLATION
* CANCELLING APPOINTMENTS WITH INSTALLERS OR MISSING SCHEDULED APPOINTMENTS MAY LEAD TO ADDITIONAL CHARGES
* REFER TO PRODUCT MANUAL FOR SPECIFIC WARRANTY AND MAINTENANCE INFORMATION.
* IF UNFORESEEN LABOR IS NEEDED TO REPAIR DAMAGE FROM WATER, TERMITES, ELECTRICAL OR PLUMBING PROBLEMS, THERE IS AN ADDED CHARGE WHICH MAY NOT BE AVAILABLE FROM HOME DEPOT SO THE CUSTOMER MUST HIRE THEIR OWN CONTRACTOR TO MAKE THE REPAIRS.
* AN ADULT OVER 18 YEARS OF AGE WITH THE AUTHORITY TO MAKE DECISIONS ABOUT YOUR INSTALLATION MUST BE PRESENT DURING THE INSPECTION (WHEN APPLICABLE), DELIVERY AND INSTALLATION
* ALL BREAKABLES AND/OR VALUABLE OBJECTS MUST BE REMOVED
* ADDITIONAL CHARGES AT THE JOBSITE MAY BE NECESSARY TO COMPLETE THE JOB AND/OR BRING THE INSTALL INTO COMPLIANCE WITH LOCAL AND/OR STATE CODES
* THE INSTALLER MAY DECLINE TO INSTALL THE JOB IF IN THEIR PROFESSIONAL OPINION IT SEEMS UNSAFE, IN VIOLATION OF STATE OR LOCAL CODES OR CANNOT BE PERFORMED TO INDUSTRY STANDARDS
* CORIAN'S PRIVATE COLLECTION (INCLUDES MARTHA STEWART LIVING) OFFERS TEXTURE AND MOVEMENT COMPARABLE TO STONE AND MITERED SEAMS ARE RECOMMENDED (ADDITIONAL CHARGES APPLY). SEAMS MAY CAUSE CHANGE IN PATTERN DIRECTION.

END OF INSTALL #2

INSTALLATION #3

REF # I20

***** CONTINUED ON NEXT PAGE *****

INSTALLATION #3
(Continued)

REF #I20

BASIC INSTALLATION LABOR:

SKU	DESCRIPTION	QTY	UM	TAX	PRICE EACH	EXTENSION
0000-724 -053	SILESTONE 2CM-NAT/	0.00	SF	Y	$0.01	$0.00

OPTIONAL LABOR SELECTED INCLUDES:

OPTION	DESCRIPTION	QTY	UM	TAX	PRICE EACH	EXTENSION
6	EDGE DETAIL - GROUP B/BULLNOSE	19.00	LF	Y	$18.00	$342.00
232	*PROMO 1/12-1/29/17* 10% OFF SELECT COLORS W/25 SF MINIMUM PURCHASE. ORDER MUST BE PAID BY 1/29- ADJUSTMENTS PAID BY 4/23. COMBINABLE W/NATL-RGNL OFFERS. STANDARD FABRICATION &INSTALLATION CHARGES APPLY. NO CREDIT APPLIED IF OFFR REFUSD/SIENNA RIDGE	48.00	SF	Y	$52.20	$2,505.60

INSTALLATION SITE NAME: TAFOYA, DUANE

ADDRESS: 1909 BRYN MAWR PL NE

CITY: ALBUQUERQUE **STATE:** NM **ZIP:** 87106

COUNTY: BERNALILLO **SALES TAX RATE:** 7.312 **TAX: Merchandise** - Y **LABOR** - Y

PHONE: (505) 8032414 **ALTERNATE PHONE:** (505) 8032414

INSTALL LABOR CHARGE:	$2,847.60
TRIP CHARGE:	$0.00
CREDIT FOR DEPOSIT/MEASURE:	$0.00
INSTALL TOTAL DUE:	$2,847.60

INSTALLER SPECIAL INSTRUCTIONS: sienna ridge 2 cm bullnose edge office application

BASIC INSTALLATION LABOR INCLUDES:

* IN HOME INSPECTION TO VERIFY LAYOUT, MEASUREMENTS, SPECIAL INSTALLATION REQUIREMENTS AND TEMPLATING
* BASIC INSTALLATION OF COUNTERTOP
* ONE SINK OR COOKTOP CUTOUT (TOPMOUNT) PER PROJECT
* FAUCET HOLE DRILLING (UP TO 4 HOLES)
* WALL SUPPORT CLEATS AS NEEDED AT CORNER CABINETS
* EASED OR RADIUS CORNERS UP TO 3/4" MAX
* EASED EDGE ON BACKSPLASH (ALL EXPOSED EDGES)
* SUBTOP OR SUPPORT STRIPS
* GROUP A EDGE DETAIL
* FINAL CLEAN UP OF ALL DEBRIS RELATED TO INSTALLATION
* DELIVERY WITHIN 30 MILE RADIUS OF STORE
* FINAL INSPECTION WITH CUSTOMER INCLUDING INSTRUCTIONS ON CARE AND/OR TEST PRODUCT TO ENSURE PROPER OPERATION

UNLESS STATED ABOVE THIS INSTALLATION DOES NOT INCLUDE:

WINDOW SILLS, GARDEN WINDOWS AND PASS THROUGHS
CABINET BUMP OUT
CUT AROUND POSTS OR ODD SHAPES
SUPPORT MATERIALS FOR OVERHANG (REQUIRED FOR OVERHANGS >6")
CUSTOM EDGES ON BACKSPLASH
REPAIR OR ALTERATIONS TO EXISTING CABINETRY
MILEAGE BEYOND 60 MILES FROM STORE ONE WAY

*** CONTINUED ON NEXT PAGE ***

INSTALLATION #3
(Continued)

REF #I20

SPECIAL NOTES:

* CHILDREN AND PETS MUST BE KEPT AWAY FROM THE WORK AREA
* CANCELLING APPOINTMENTS WITH INSTALLERS OR MISSING SCHEDULED APPOINTMENTS MAY LEAD TO ADDITIONAL CHARGES
* REFER TO PRODUCT MANUAL FOR SPECIFIC WARRANTY AND MAINTENANCE INFORMATION.
* IF UNFORESEEN LABOR IS NEEDED TO REPAIR DAMAGE FROM WATER, TERMITES, ELECTRICAL OR PLUMBING PROBLEMS, THERE IS AN ADDED CHARGE WHICH MAY NOT BE AVAILABLE FROM HOME DEPOT SO THE CUSTOMER MUST HIRE THEIR OWN CONTRACTOR TO MAKE THE REPAIRS.
* AN ADULT OVER 18 YEARS OF AGE WITH THE AUTHORITY TO MAKE DECISIONS ABOUT YOUR INSTALLATION MUST BE PRESENT DURING THE INSPECTION (WHEN APPLICABLE), DELIVERY AND INSTALLATION
* ALL BREAKABLES AND/OR VALUABLE OBJECTS MUST BE REMOVED FROM THE WORK AREA PRIOR TO INSTALLATION
* ADDITIONAL CHARGES AT THE JOBSITE MAY BE NECESSARY TO COMPLETE THE JOB AND/OR BRING THE INSTALL INTO COMPLIANCE WITH LOCAL AND/OR STATE CODES
* THE INSTALLER MAY DECLINE TO INSTALL THE JOB IF IN THEIR PROFESSIONAL OPINION IT SEEMS UNSAFE, IN VIOLATION OF STATE OR LOCAL CODES OR CANNOT BE PERFORMED TO INDUSTRY STANDARDS

END OF INSTALL #3

TOTAL CHARGES OF ALL MERCHANDISE & SERVICES

Policy Id (PI):
A: 90 DAYS DEFAULT POLICY;

'The Home Depot reserves the right to limit / deny returns. Please see the return policy sign in stores for details.'

ORDER TOTAL	$11,039.27
SALES TAX	$807.25
TOTAL	$11,846.52
BALANCE DUE	$11,846.52

END OF ORDER No. H3501-42607

Home Improvement Agreement
PLEASE READ THIS

Important additional information regarding Customer's rights may be contained in an attached State Supplement.

Scope: This "Agreement" consists of this page, the following General Terms and Conditions, the Invoice, the State Supplement if applicable, and any drawings or Change Orders expressly made a part of this Agreement. The Agreement is between the Customer identified on the Invoice and The Home Depot. Any installation services provided under this Agreement shall be performed by a licensed and insured third party Authorized Service Provider. The Home Depot does not perform architectural or engineering services, nor does it make structural changes to dwellings or other structures. The Home Depot and its Authorized Service Provider will perform installation services in accordance with applicable law.

Payment Schedule: Payment is required immediately as follows:

Payment:	$ 11039.27	**Due in full immediately.**
Sales Tax:	$ 807.25	**If applicable.**
Total Amount of Sale:	$ 11846.52	**Includes all applicable discounts, rebates, and taxes. Excludes finance charges.***

*Any interest payments or other finance charges will be determined by Customer's separate cardholder or loan agreement, to which The Home Depot is NOT a party, and will be in addition to Customer's payment under this Agreement. Customer is subject to the terms and conditions of the cardholder or loan agreement, as applicable. No funds should be made payable to Authorized Service Provider; however, Authorized Service Provider may collect Customer's payment(s) made payable to The Home Depot.

Anticipated Delivery / Installation Schedule

Delivery Date: TBD **Start Date:** **Finish Date:**

Acceptance and Authorization: Customer authorizes The Home Depot to order and arrange for the delivery of all goods and services included on the Invoice. Customer further agrees and understands that this Agreement is the entire agreement between Customer and The Home Depot with regard to said goods and services and supersedes all prior discussions and agreements, either oral or written relating to said goods and services. This Agreement can not be assigned or amended except by a writing signed by Customer and The Home Depot. Customer acknowledges and agrees that Customer has read, understands, voluntarily accepts the terms of and is entitled to and has received a complete copy of this Agreement at the time Customer signs the Agreement. Installation Professional's license number and permitting information may need to be provided later and as such this information may be omitted at the time this Agreement is signed.

Electronic Signature: The parties to the Agreement agree that the digital signatures of the parties included in this Agreement are intended to authenticate this writing and to have the same force and effect as the use of manual signatures. Customer acknowledges that he or she is the person named on The Home Depot contract number identified on the point of sale device.

CANCELLATION: CUSTOMER MAY CANCEL THIS AGREEMENT WITHOUT PENALTY OR OBLIGATION BY DELIVERING WRITTEN NOTICE TO THE HOME DEPOT BY MIDNIGHT ON THE THIRD BUSINESS DAY AFTER SIGNING THIS AGREEMENT. THE STATE SUPPLEMENT ATTACHED HERETO CONTAINS A FORM TO USE IF ONE IS SPECIFICALLY PRESCRIBED BY LAW IN CUSTOMER'S STATE. Under such circumstances, Customer's payment(s) will be returned within ten (10) business days after The Home Depot's receipt of Customer's notice.

Accepted by:

X _____ 01/18/2017

Customer's Signature Date

Authorized Service Provider's Full Business/Trade Name, Address and License No. or No(s)., as applicable:

_____

_____

_____

License No(s). _____

Authorized Service Provider's Tel. No. _____

X _____

Associate's/Authorized Service Provider's Full Signature

_____

Date

_____

Associate: Please print your salesperson's license number, if applicable.

Home Improvement Agreement
General Terms and Conditions

Questions? If The Home Depot store and Authorized Service Provider are unable to answer Customer's questions, Customer may contact The Home Depot Customer Care Department at 1-800-553-3199 or use the address below.

Responsibilities:

The Home Depot: will provide the products identified on the Invoice and make arrangements to have the Authorized Service Provider perform the installation services in a professional and workmanlike manner. Unless otherwise expressly provided for herein, Authorized Service Provider will obtain required permits and provide permit numbers if required.

Customer: will identify any property lines, easements, covenants, underground or overhead utility lines, pre-existing physical or environmental hazards, building code violations or other legal encumbrances that could affect the installation services prior to the installation. Customer shall keep posted permits on display at all times. Customer is responsible for any delays or interference caused to installation by Customer or third party under Customer's direction or control.

Changes and Change Orders: Any changes to the installation, including but not limited to changes necessitated by undisclosed, unidentified or unforeseen conditions on the site, are subject to a written Change Order signed by Customer and The Home Depot and any additional products or services included in such Change Order will be paid for in full before any such change is made. The Home Depot or Authorized Service Provider has no obligation to attempt to remediate any such conditions and may immediately discontinue the installation or ask for a Change Order. Please note, The Home Depot or Authorized Service Provider will not remediate any mold, asbestos and lead-based paint. Neither The Home Depot nor the Authorized Service Provider is responsible for delays caused by events beyond either party's control including but not limited to acts of nature, governmental actions, delivery delays or damages caused by third parties, labor strikes, Customer's credit or financing, or any incorrect information or non-compliance with this Agreement by Customer.

Liens; Security Interests: If Customer makes all payments as required under this Agreement, no security interest will be placed against Customer's property by The Home Depot. After paying on any completed distinct phase of the installation, Customer may request from Authorized Service Provider a signed lien release and waiver of any right to place any claim against Customer's property applicable to the work then completed. Customer should also refer to the State Supplement for specific State requirements, if any.

LIMITED WARRANTY: TO THE EXTENT PERMISSIBLE UNDER APPLICABLE LAW, THE HOME DEPOT WARRANTS THE WORKMANSHIP OF THE INSTALLATION FOR ONE (1) YEAR FROM ITS COMPLETION DATE. PROVIDED CUSTOMER NOTIFIES THE HOME DEPOT DURING THE WARRANTY PERIOD, THE HOME DEPOT WILL ARRANGE FOR REPAIR AT NO CHARGE TO CUSTOMER FOR ANY DEFECTS DUE TO FAULTY WORKMANSHIP. THE HOME DEPOT'S WARRANTY DOES NOT COVER DAMAGE CAUSED BY ACTS OF GOD, INSTALLATION OR REPAIRS MADE BY PERSONS OTHER THAN THE HOME DEPOT OR AUTHORIZED SERVICE PROVIDER, ABUSE, MISUSE, NEGLECT, OR NORMAL WEAR AND TEAR. MERCHANDISE AND MATERIALS ARE COVERED EXCLUSIVELY BY THE MANUFACTURER'S WARRANTY, IF ANY. THIS LIMITED WARRANTY GIVES CUSTOMER SPECIFIC LEGAL RIGHTS AND CUSTOMER MAY ALSO HAVE OTHER RIGHTS THAT MAY VARY FROM STATE TO STATE.

WAIVER OF CERTAIN DAMAGES: EACH OF CUSTOMER AND THE HOME DEPOT HEREBY WAIVES ANY CLAIMS AGAINST THE OTHER FOR LOST USE, LOST PROFIT, LOST REVENUE, INDIRECT, INCIDENTAL OR CONSEQUENTIAL DAMAGES RELATING TO THE INSTALLATION, THE MATERIALS OR SERVICES OF THE HOME DEPOT OR OF AUTHORIZED SERVICE PROVIDER OR THIS AGREEMENT. TO THE EXTENT CUSTOMER'S STATE DOES NOT ALLOW THE EXCLUSION OR LIMITATION OF INCIDENTAL OR CONSEQUENTIAL DAMAGES, THIS SECTION MAY NOT APPLY.

Termination: If Customer breaches this Agreement or declines a reasonable Change Order request, The Home Depot may immediately terminate the Agreement without further obligation. In the event of such termination, Customer agrees to pay The Home Depot the costs of materials, labor, expenses and services provided by The Home Depot or Authorized Service Provider through the date of termination, plus any other amounts set forth in this Agreement or allowed under applicable law. THE HOME DEPOT MAY WITHHOLD AMOUNTS OWED TO THE HOME DEPOT FROM THE DOWN PAYMENT OR OTHER PAYMENTS MADE, WITHOUT LIMITING THE HOME DEPOT'S OTHER REMEDIES FOR RECOVERY OF SUCH AMOUNTS.

Acknowledgment: If Customer's purchase includes Countertop installation, Customer acknowledges and agrees that Customer has received and understands the following additional documentation: (a) Countertop installation: What to Expect; and (b) Product Specification Sheet. The Home Depot, via third party, offers Extended Protection Plans on some products. Customer may receive marketing materials on The Home Depot's behalf concerning such Extended Protection Plans.

The Home Depot Special Services
Will Call/Direct Ship/Delivery

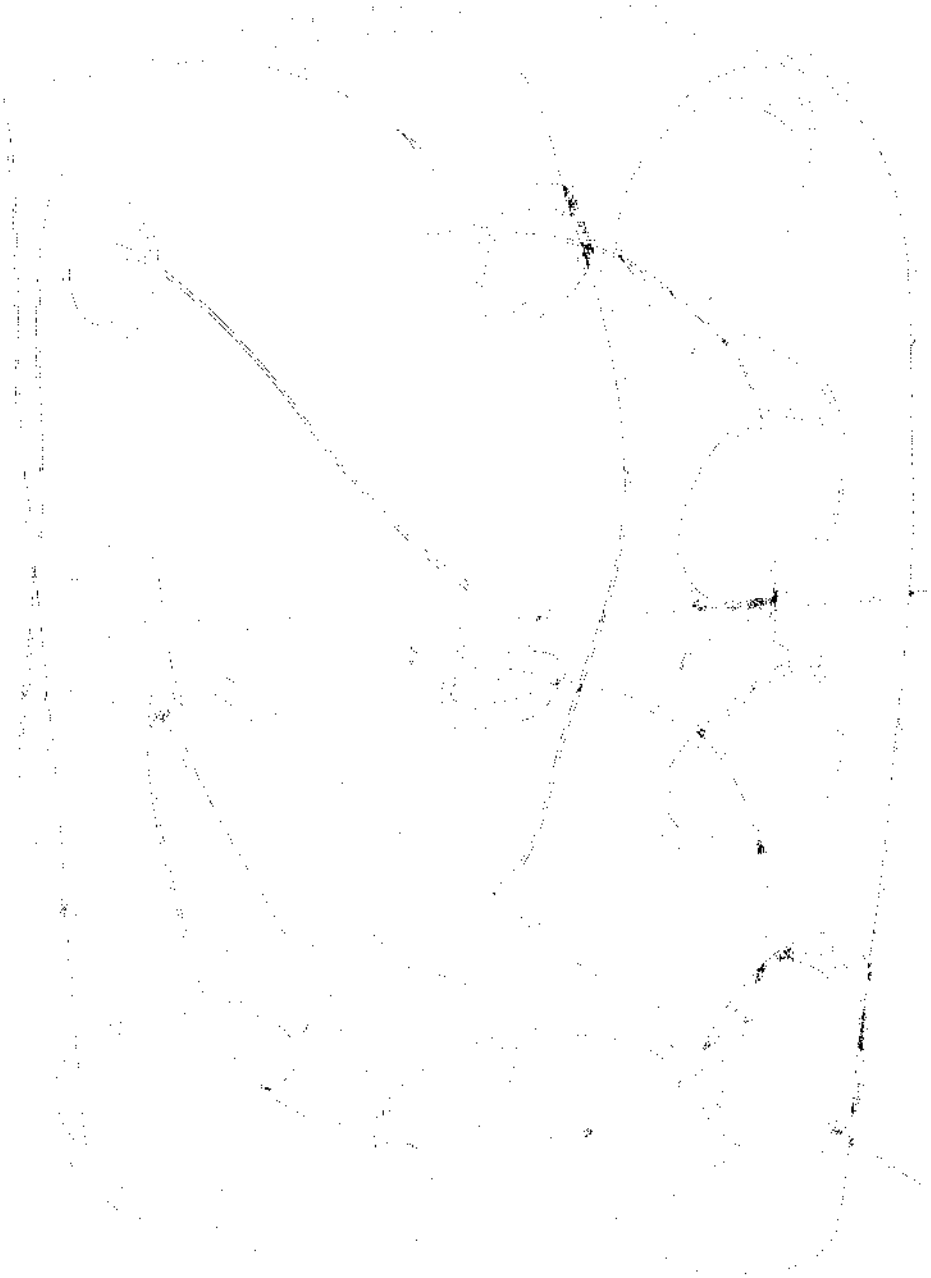
Returns: Except where prohibited by law, all returned Special Order Merchandise is subject to a fifteen percent (15%) restocking fee. Custom made goods are not returnable.
Will Call: The Home Depot Store will call the number provided on the invoice when your order is available. A Will Call held at the store for over thirty (30) days shall be subject to the abandoned property laws in your state.
Direct Ship: Direct Ship merchandise will be sent by the vendor and/or manufacturer to the address on the invoice.
Delivery: The Home Depot shall arrange for its delivery agent to deliver the merchandise to the address identified on the invoice pursuant to the following terms and conditions:
Roads Notice: The delivery address must be accessible by vehicle over roads and bridges rated to handle up to and including (40) forty ton loads. If any portion of delivery agent's route must traverse a section of road that is not rated to handle a forty ton load or heavier, Customer will be responsible for seeking a waiver, at Customer's expense, from the appropriate governmental authority. If Customer is unable to obtain a waiver, delivery service will not be available to the delivery address.
Unattended Drop: **If Customer will not be present to accept the delivery, and the delivery can be left unattended, please initial below:**
_____ By initialing here, I authorize The Home Depot and its delivery agent to leave the merchandise unattended following delivery, and I accept full responsibility for any resulting loss of, or damage to, the merchandise.
Outside Deliveries Only: If you are purchasing merchandise designated by The Home Depot for ***outside delivery*** only, your purchase **does not** include delivery of the merchandise beyond curbside; however, additional services may be available to deliver the merchandise to a location that you designate. In that event, you will be presented with the following waiver at the time of delivery, which you must sign as a condition of receiving any additional delivery services:

> In consideration of the delivery of the merchandise that I purchased from The Home Depot ("Merchandise") to a location designated by me at my request, I, _____, on behalf of myself and my agents, successors, and assigns, hereby **RELEASE AND FOREVER DISCHARGE, WITHOUT CONDITIONS,** Home Depot U.S.A., Inc. and its affiliates, employees, officers, directors, managers, agents, contractors and any other person working through or under it (hereinafter collectively "The Home Depot"), from any and all claims, causes of action, demands, liabilities, damages, costs and expenses, of every kind and nature, whether known or unknown, suspected or unsuspected, which exist now or in the future (hereinafter "Claims"), relating and/or arising out of the delivery of the Merchandise. **I FURTHER EXPRESSLY, FULLY, AND UNCONDITIONALLY ASSUME ANY AND ALL RISKS AND FULL LIABILITY FOR ANY RESULTING PERSONAL INJURY, DAMAGE TO PROPERTY OR DAMAGE TO MERCHANDISE WHICH MAY GIVE RISE TO CLAIMS AGAINST ME AND/OR THE HOME DEPOT. I HAVE FULLY INFORMED MYSELF OF THE NATURE OF THE RISKS INHERENT IN THE DELIVERY OF THE MERCHANDISE AND VOLUNTARILY AGREE TO ALLOW DELIVERY OF THE MERCHANDISE ONTO MY PREMISES. I HAVE CAREFULLY READ AND COMPLETELY UNDERSTAND THIS RELEASE AND ASSUMPTION OF RISK FORM BEFORE SIGNING IT.** This agreement shall become effective upon my signature and shall be governed by the laws of the State of Georgia.

If you choose not to utilize additional delivery services beyond curbside delivery, you will not be required to sign the above waiver.

Accepted by:

X_____ 01/18/2017
Customer's Signature **Date**



CDBG/AHTF Presentation Schedule to CDC: Wednesday, February 15, 2017

9:00 -9:30	*Housing Trust: Down Payment Assistance (CDBG)* *Housing Trust: Down Payment Assistance (AHTF)*
9:30-9:45	*Habitat For Humanity: Single Family Home Improvements(CDBG)*
9:45-:10:30	*Homewise Home Improvement (CDBG)* *Homewise Down Payment Asst(CDBG)* *Homewise Down Payment Asst (AHTF)*
10:30-10:45	*New Mexico Legal Aid (CDBG)*
10:45-11:00	*Kitchen Angels(CDBG)*
11:00-11:15	*Adelante(CDBG)*
11:15-11:30	*Esperanza(CDBG)*
11:30-11:45	*Interfaith Shelter(CDBG)*
11:45-1:15	*LUNCH BREAK*
1:15-1:30	*Youth Shelters (CDBG)*
1:30-2:00	*St. Elizabeth's: Casa Cerillos(CDBG)* *St. Elizabeth's : Siringo (AHTF)*
2:00-2:30	*YouthWorks! Facility (CDBG)* *YouthWorks! Shelter Now (AHTF)*
2:30-2:45	*Santa Fe Recovery Center (CDBG)*
2:45-4:00	*PRESENTATIONS CLOSED – CDC Discussion and Project Selection*

Emergency Repair
Some overlap w/ Homewise
+ Habitat

Homewise AHTF
Out of pocket. $4300

Housing Trust - AHTF
out of pocket $6900.00

130
370
500

RFP 17/22 - CDBG Score Sheet			Evaluator	Evaluator	Evaluator	Evaluator	Evaluator	Evaluator	
Applicant	Max Score	Funding Request	Hughes	Lopez	Goblet	Peterson	Padilla	Villareal	Average Score
#1- Housing Trust		Down Payment Asst ($200K)							
Scoring Criteria	100	Activity	100	100	100	60	80	80	86.66667
	100	National Objective Compliance	100	80	100	80	80	60	83.33333
	50	Consolidated Plan Compliance	20	50	50	50	40	50	43.33333
	50	Budget	30	50	50	50	40	40	43.33333
	100	Performance/Work Plan	60	100	100	100	100	80	90
									69.33333
#2 - Habitat for Humanity		SF Home Impr. ($60K)							
Scoring Criteria	100	Activity	80	100	100	Abstained	100	100	96
	100	National Objective Compliance	100	100	100		100	80	96
	50	Consolidated Plan Compliance	40	50	50		50	50	48
	50	Budget	50	50	50		50	50	50
	100	Performance/Work Plan	80	100	100		100	100	96
									77.2
#3 - Homewise		Home Impr. ($100K)							
Scoring Criteria	100	Activity	80	100	80	60	80	80	80
	100	National Objective Compliance	100	100	70	100	80	60	85
	50	Consolidated Plan Compliance	40	50	50	50	30	50	45
	50	Budget	50	50	50	50	50	30	46.66667
	100	Performance/Work Plan	100	100	100	100	100	100	100
									71.33333
#4 - Homewise		Down Payment Asst ($200K)							
Scoring Criteria	100	Activity	80	100	80	60	80	80	80
	100	National Objective Compliance	80	80	80	80	80	60	76.66667
	50	Consolidated Plan Compliance	50	50	50	50	40	50	48.33333
	50	Budget	50	50	50	50	50	30	46.66667
	100	Performance/Work Plan	100	100	100	100	100	100	100
									70.33333
#5- NM Legal Aid		Foreclosure Legal Asst ($15K)							
Scoring Criteria	100	Activity	80	100	100	80	80	100	90
	100	National Objective Compliance	100	100	100	80	160	80	103.3333
	50	Consolidated Plan Compliance	40	50	50	50	80	50	53.33333
	50	Budget	50	50	50	50	100	50	58.33333
	100	Performance/Work Plan	100	100	100	100		80	96
									80.2

#6 - Kitchen Angels		Home delivered meals ($38K)							
Scoring Criteria	100	Activity	100	100	100	80	Abstained	100	96
	100	National Objective Compliance	80	100	100	80		80	88
	50	Consolidated Plan Compliance	50	50	50	40		30	44
	50	Budget	50	50	50	50		40	48
	100	Performance/Work Plan	100	100	100	100		100	100
									75.2
#7 - Adelante		Elementary Sch. Liaison							
Scoring Criteria	100	Activity	100	100	100	100	100	100	100
	100	National Objective Compliance	100	100	100	100	100	100	100
	50	Consolidated Plan Compliance	50	50	50	50	50	50	50
	50	Budget	50	50	50	50	40	40	46.66667
	100	Performance/Work Plan	100	100	80	60	80	80	83.33333
									76
#8 - Esperanza		Rental/subsistence payments							
Scoring Criteria	100	Activity	100	100	100	80	100	100	96.66667
	100	National Objective Compliance	80	100	100	100	80	80	90
	50	Consolidated Plan Compliance	40	50	50	50	50	50	48.33333
	50	Budget	30	50	50	50	50	30	43.33333
	100	Performance/Work Plan	60	100	100	100	100	80	90
									73.66667
#9 - Interfaith Shelter		Women's Supportive Shelter							
Scoring Criteria	100	Activity	100	100	100	100	100	80	96.66667
	100	National Objective Compliance	100	100	0	100	100	80	80
	50	Consolidated Plan Compliance	40	50	0	50	50	50	40
	50	Budget	50	50	0	50	50	30	38.33333
	100	Performance/Work Plan	80	100	0	80	100	80	73.33333
									65.66667
#10 - Youth Shelters		Street outreach ($20,551)							
Scoring Criteria	100	Activity	80	100	100	100	100	100	96.66667
	100	National Objective Compliance	80	100	100	100	50	100	88.33333
	50	Consolidated Plan Compliance	30	50	50	50	40	50	45
	50	Budget	40	50	50	50	100	40	55
	100	Performance/Work Plan	40	100	100	100		60	80
									73

#11 - St. Elizabeth Shelter		Casa Cerrillos ($43,750)							
Scoring Criteria	100	Activity	80	100	100	80	40	80	80
	100	National Objective Compliance	100	100	100	100	60	80	90
	50	Consolidated Plan Compliance	40	50	50	50	30	50	45
	50	Budget	50	50	50	50	20	50	45
	100	Performance/Work Plan	100	100	100	80	60	80	86.66667
									69.33333
#12 - Youth Works!		Facility Improvement (65K)							
Scoring Criteria	100	Activity	40	100	100	40	80	80	73.33333
	100	National Objective Compliance	40	100	80	40	100	80	73.33333
	50	Consolidated Plan Compliance	30	50	50	30	40	50	41.66667
	50	Budget	40	50	30	20	30	40	35
	100	Performance/Work Plan	80	100	80	60	80	80	80
									60.66667
#13 - Santa Fe Recovery Ctr		Facility Improvement ($50K)							
Scoring Criteria	100	Activity	40	60	50	40	80	80	58.33333
	100	National Objective Compliance	40	100	75	60	60	80	69.16667
	50	Consolidated Plan Compliance	20	30	50	40	40	50	38.33333
	50	Budget	30	30	30	20	30	50	31.66667
	100	Performance/Work Plan	20	60	70	60	60	80	58.33333
									51.16667

RFP 17/28 AHTF Score Sheet

Applicant	Max Score	Project Name/Funding Request	Evaluator Hughes	Evaluator Lopez	Evaluator Goblet	Evaluator Peterson	Evaluator Padilla	Evaluator Villareal	Average Score
Housing Trust		Arroyo Central Down Payment Asst ($75K)							
Scoring Criteria	100	Funding	100	100	80	80	80	100	90
	200	Need/Benefit/Project Feasibility	200	200	200	160	200	70	171.6667
	100	Affordability	100	100	100	100	80	80	93.33333
	100	Demonstrated Capability/Organizational Mgmt	100	100	100	100	100	100	100
									113.75
Housing Trust		Down Payment Asst ($150K)							
Scoring Criteria	100	Funding	100	100	100	80	80		92
	200	Need/Benefit/Project Feasibility	200	200	200	120	200		184
	100	Affordability	100	100	80	100	80		92
	100	Demonstrated Capability/Organizational Mgmt	100	100	100	100	100		100
									117
Homewise		Down Payment Asst ($250K)							
Scoring Criteria	100	Funding	100	100	70	80	80	100	88.33333
	200	Need/Benefit/Project Feasibility	200	200	150	120	160	120	158.3333
	100	Affordability	100	100	70	100	80	80	88.33333
	100	Demonstrated Capability/Organizational Mgmt	100	100	100	100	100	100	100
									108.75

YouthWorks!		Shelter Now!							
Scoring Criteria	**100**	Funding	100	100	100	40	80	100	86.66667
	200	Need/Benefit/Project Feasibility	160	200	180	120	120	120	150
	100	Affordability Demonstrated	80	100	100	100	80	100	93.33333
	100	Capability/Organizational Mgmt	100	100	80	60	80	60	80
									102.5
St. Elizabeth's Shelter		Siringo Senior Apt Rehab ($63,840)							
Scoring Criteria	**100**	Funding	60	20	75	20	60	60	49.16667
	200	*Need/Benefit/Project Feasibility*	*160*	*200*	*200*	*120*	*80*	160	153.3333
	100	Affordability Demonstrated	100	100	100	100	80	100	96.66667
	100	Capability/Organizational Mgmt	80	100	100	100	60	100	90
									97.29167

AMBROSINO, MARGARET K.

From:	AMBROSINO, MARGARET K.
Sent:	Wednesday, February 08, 2017 12:17 PM
To:	Carla Lopez; John Padilla; Ken Hughes; Rusty Tambascio; Silas Peterson; thegoblets@aol.com; VILLARREAL, RENEE D.
Cc:	LADD, ALEXANDRA G.
Subject:	Proposal Scoring b/4 Feb 15 meeting
Attachments:	AHTF Score Sheet_FINAL.pdf; CDBG Eval-Score Sheet-FINAL.pdf

Good Afternoon, CDC:

As there is a change in procedure this year, I've provided scoring instructions for the CDBG and AHTF applications.

There are a total of 18 proposals split between two grant sources: Community Development Block Grant (CDBG) and Affordable Housing Trust Fund (AHTF). To clarify we received two proposals from the same applicant for the AHTF requests (same work scope, different amounts), so that is why you'll count only 17 tabs in the binder. Since they came in as two separate submittals, they will be evaluated separately.

Score sheets are provided for you at the front of each submittal. CDBG is on a 400-point scale, and AHTF is on a 500-point scale. We are asking you to complete the following steps for each application:

1. Read each proposal
2. Complete the scoring : fill in title, amount requested, assign an evaluation point for each of the criteria, total up, sign and date.
3. Deliver your 18 score sheets back to me by next Tuesday at noon.
4. there's a conflict of interest disclosure to be completed for CDBG (1722) and AHTF (1728). They are located behind each score sheet. Should you need to recuse/step out and cannot sign the form due to a conflict, it will be noted in the actual meeting minutes on Feb. 15.

Hand-delivered or scanned and emailed back to me (Margaret) is fine. I'll pick up completed sheets if necessary. I promise once you start reading it will go by fast. Because of the volume of proposals, very limited time to decide funding on Feb. 15th, and purchasing documentation requirements, we have to do it this way.

After scores are received, staff analysis will be provided which shows funding history, etc. After presentations are complete but before funding amounts are decided, we will have all scores entered in a spreadsheet to be adjusted if needed.

Thank you Committee members for all that you do to serve the community and this process. Your talents are greatly appreciated. Upon receipt of your binder, if anything seems missing, improperly ordered or not right, please notify me immediately. Additional Score sheets are attached.

Margaret

K. Margaret Ambrosino, AICP
Senior Housing Planner/CDBG Program
City of Santa Fe
505-955-6574

SUMMARY OF 2017 PROJECT APPLICATIONS			Funding Source	
			CDBG	AHTF
APPLICANT	**The Housing Trust**	**FUNDING REQUEST(S)**	$200,000	$225,000
PROPOSED PROJECT	Down Payment Assistance (DPA) for households earning up to 80% AMI. Limit of $20K per household.			
SUMMARY OF REQUEST	Provide DPA to qualified homebuyers who have completed homebuyer training and counseling; loans are zero-interest, due on sale, transfer, or refinance, with particular consideration of households under 60% AMI, displaced homemakers, female heads of households, minorities and households currently residing in substandard conditions. CDBG funds will serve estimated 15-20 households / 20-45 family members. Approved homebuyers will receive up to $20,000 in DPA.			
CDBG FUNDING HISTORY	2010 ($58K); 2011 ($116K); 2013 ($93,500); 2014 ($60K); 2015 ($100K); 2016 ($120K)			
ANALYSIS	DPA is a critical affordability tool because it buys down the principal mortgage amount, resulting in a lower monthly payment and reducing the need for mortgage insurance. Long term affordability is ensured through a lien placed on the property that prevents the homeowner from selling the home for a profit.			
FUNDING CONSIDERATIONS	This is a high priority housing activity to support the workforce of Santa Fe as well as generating PI that revolves back into the program ($10K was earned in Q4 last year); there is $49K remaining EN funding on the 2016 contract and the Housing Trust is on track to spend in full. Funding at or close to the requested amount is appropriate.			
AHTF Proposal #1: $75K	Down payment Assistance for first-time homebuyers: Arroyo Central Workforce			
SUMMARY OF REQUEST	Provide DPA for 5 homebuyers earning 80-120% AMI in the Arroyo Central Subdivision of Tierra Contenta averaging $15K per loan (5 loans)			
AHTF FUNDING HISTORY	2009 ($125K); 2010 ($96.7K); 2012 ($108K); 2014 ($85K) 2015 ($100K)			
ANALYSIS	Meets need for workforce housing; HT provides amortizing 2nd mortgages via MI$ Saver program that eliminate mortgage interest, thus creating significant savings and long-term monthly mortgage affordability for the mod-income buyer. Proposed timeline to end 12/31/18 a concern, as contracts are for fiscal year 7/1/17-6/30/18.			
FUNDING CONSIDERATIONS	$13:$1 Leverage and $2:$1 match proposed. Project funding could be consolidated with PROPOSAL#2. Funding request should realistically fit the fiscal year, not 18 months. Funding both proposals through one contract is appropriate			
AHTF Proposal #2: ~~$125K~~ $150K	Down Payment Assistance for moderate-income first-time homebuyers			
SUMMARY OF REQUEST	Provide DPA for 8-10 households earning primarily between 80-120% AMI			
ANALYSIS	Same as above for AHTF Proposal #1			
FUNDING CONSIDERATIONS	$12:1 Leverage/$2.27:$1 match proposed. Same as above; distinction between the need for two proposals for DPA is unclear; work scope is the same and there are no restrictions for funding Arroyo Central Mod-income workforce vs proposal #2 separately. If awarded, proposals should be treated as one contract consolidating the number of households served and funding at or below the total for both. Funding should also fit the number of buyers that can realistically be served, and funding spent, for the 12-month fiscal year, not 18 months.			

			CDBG	AHTF
APPLICANT	**Santa Fe Habitat for Humanity**	**FUNDING REQUEST**	$60,000	**None**
PROPOSED PROJECT	Emergency repairs for homeowners earning below *60% AMI (CDBG)*; below 120% AMI (AHTF). Limit of $25K per h/h.			
SUMMARY OF REQUEST	2017 Funding is proposed to support 10 households/15 persons at or below 60% of Area Median Income (AMI), mainly elderly;			
CDBG FUNDING HISTORY	$60,000 DPA (2014) $50,000 DPA (2015); $60,000 same project, home improvement (2016)			
AHTF FUNDING HISTORY	$20K PV panels (2014); $20K emergency repair (2014); $100K DPA (2015) $50K Home imp (2015)			
ANALYSIS	Second year of CDBG for home improvement (if funded); average loan per household: $7K – by start of Q3 in first year of contract exceeded minimum of 5 households. Emergency repairs for existing homeowners directly supports housing priority by allowing elderly homeowners to remain in homes and age in place. 2016 application proposed 30 clients; contract minimum of 6. As of Q3 have served 3 clients.			
FUNDING CONSIDERATIONS	Second year of CDBG for home improvement (if funded); average loan per household: $7K – by start of Q3 in the 2015-16 first year of contract, Habitat exceeded minimum of 5 households with 17 households served. Emergency repairs for existing homeowners directly supports housing priority by allowing elderly homeowners to remain in homes and age in place. 2016 application proposed 30 clients; contract is minimum of 6. As of Q3 have served 3 clients.			

			CDBG	AHTF
APPLICANT	[redacted]	**FUNDING REQUEST**	[redacted]	**None for H/I**
PROPOSED PROJECT	Home Improvement loans for LMI homeowners			
SUMMARY OF REQUEST	Improvement and Emergency Home Repair loans made with CDBG funds for 10-15 homeowners earning below 80% AMI (CDBG); $25K limit per h/h.			
CDBG FUNDING HISTORY	2009 ($126,750); 2010 ($100K); 2011 ($100K-septic to sewer line project); 2011 ($85K); 2012 ($85K); 2014 ($40K); 2016 ($15K)			
AHTF FUNDING HISTORY	2014 ($50K); 2015 ($50K)			
ANALYSIS	This program may augmented by Homewise's requests for CDFI, NM Bank and Trust requests for amortizing funds, and Homewise's own loan fund. 10-15 proposed loans averaging $10K each with 10 households served to date on 2016-2017 contract. CDBG limit of $25K per household;			
FUNDING CONSIDERATIONS	The opportunity to provide emergency repairs for existing homeowners supports the highest (housing) priority. None of the $15 K of the 2016 funding has been spent due to Program Income (PI) as of the first half of the fiscal year; however, PI balance is at a record low level ($15K). If EN funding is awarded and tapped in 2017-18, it could allow for additional 5-10 loans, especially when considering the high PI-earning potential of this program. Funding this program again in 2017-2018 is recommended at a low level (below $50K), because the proposed loans can in part be achieved by newly earned PI.			

				AHTF
APPLICANT	[redacted]	**FUNDING REQUESTS**	[redacted]	**$250,000**
PROPOSED PROJECT	Down Payment Assistance (DPA) to first time homebuyers below 80% AMI-CDBG			
SUMMARY OF REQUEST	Provide DPA to 15-20 households for CDBG			
[redacted]	Homewise has funded DPA loans through CDBG since 1995 for over $2.5 million of assistance provided to Santa Fe homebuyers. Since 2004, they have received approx. $1,550,000 in entitlement *funding, providing approx.* 310 loans. The organization has also managed a revolving loan fund with the program income generated through the DPA and home improvement. In 2010, the DPA program was funded entirely through program income. CDBG limit of up to $20K per household.			

ANALYSIS	High priority activity according to the City's Housing Needs Analysis and Consolidated Plan; 18 households funded in 2015-2016 and 13 to date for 2016-2017 contract.		
FUNDING CONSIDERATIONS	DPA for prospective homeowners directly supports housing priority for 2017-18. Timely draws of entitlement funding for this program are challenging due to the amount of generated PI required to be spent first. 2015-2016 DPA contract was extended to 6/30/2017. Funding this program with new 2017 funds, and at less than the requested amount for CDBG, is appropriate.		
AHTF PROPOSAL	Provide DPA to 27 households		
SUMMARY OF REQUEST	Down Payment Assistance (DPA) to first time homebuyers *below120% AMI*		
AHTF FUNDING HISTORY	2009 ($125K); 2010 ($115K); 2012 ($170K); 2014 ($55K); 2015 ($150K)		
ANALYSIS	Same as above, but with an average loan size of approx. $9,250		
FUNDING CONSIDERATIONS	$19:$1 leverage and $3.78:$1 match are proposed; loans provide a valuable alternative to FHA lending. Funding at or below the AHTF requested amount is appropriate b/c many loans made are for households just over 80% AMI and ineligible for CDBG.		
			CDBG
APPLICANT	**New Mexico Legal Aid**	**FUNDING REQUEST**	[redacted]
PROPOSED PROJECT	Legal assistance: foreclosure prevention to LMI residents.		
SUMMARY OF REQUEST	Funding would pay a portion of attorney's salary to work with 15 household cases through representation in foreclosure and an additional 12 households through providing advice for self-representing homeowners at foreclosure workshops.		
[redacted]	Legal Assistance via United South Broadway Corp Santa Fe-based attorney for 50 Santa Fe cases in 2011 ($50,108)2016 ($10K)		
ANALYSIS	2011 project was funded at $50K and served 50 foreclosure cases. 2016 has served only 1 case from 22 proposed.		
FUNDING CONSIDERATIONS	Public Service (15% cap) and not a housing-qualifying activity as stated in the application, though work contributes to preserving housing via foreclosure prevention; overall helps with neighborhood stabilization. NMLA has reported one (1) household served of the 22 cases it has proposed for the current contract year and will need to clarify if they have made progress towards the deliverable of keeping homeowners in their housing during this contract period, in which case, the number may be higher than one household. This years' proposal demonstrates an increase in services and in client households served.		
			[redacted]
APPLICANT	[redacted]	**FUNDING REQUEST**	[redacted]
PROPOSED PROJECT	Meal delivery to chronically-ill, homebound residents.		
SUMMARY OF REQUEST	Continuation project: KA provides fresh, nutritionally-appropriate meals for chronically ill residents below 80% AMI		
[redacted]	Kitchen Angels has received funding for this project in 2013 ($30,000); 2014($20,000) 2015 ($20,000); 2016 ($20K). They receive $50,000 currently from the City's Human Service Division.		
ANALYSIS	*On track to support 17new clients* this year under current contract		
FUNDING CONSIDERATIONS	Public Service (15% cap) limitation of total grant funding. Service enables elderly and/or chronically ill to receive delivered therapeutic meals in an effort to maintain health and reduce assisted living needs/expenses. Receives $50K from City Human Svc for current FY. For current program year have served 297 clients and proposing to 17 new clients with CDBG; Brings $831K in total resources. Recommended funding at or below request is appropriate.		
			[redacted]
APPLICANT	**Santa Fe Public Schools Adelante Program**	**FUNDING REQUEST**	[redacted]

PROPOSED PROJECT	Expanded Program: Elementary School Liaison
SUMMARY OF REQUEST	The elementary liaison project links Adelante parents, their children from K-6, the Adelante case manager and school personnel to promote the child's success through accessing stable housing and other public benefits for families of SFPS experiencing homelessness with food, clothing, school supplies, transportation and linking students and their families to critical services. Proposing to increase from 100 families/400 children served, to 200 families/600 children.
CDBG FUNDING HISTORY	This project received $20,000 of CDBG funds in 2010; $10,000 in 2012; $15,000 in 2013; $2015 ($23,500)2016 ($20,188 for Elementary School liaison). The organization receives an annual operating grant from the City's Children and Youth Commission of approximately $50,000 per year. DACA Project received $17,500 in 2014; $24K in 2015.
ANALYSIS	600children proposed for 2017; 109 youth served as of Q2 for 2016 Elementary school project.
FUNDING CONSIDERATIONS	This project has been successful in the past; supports high priority need of helping to get people out of homelessness; Adelante has made some improvements with record keeping and invoicing. Overall budget is secured but application did not report funding received from City CYD. 2017 request will support 1.5 staff liaisons and will contribute a college intern at no cost. Last year's monitoring Adelante was recommended to establish a more reliable filing/tracking/electronic database to track students as record keeping was poor. Conditional upon applicant demonstrating improved tracking of students or families served, funding at or below request is appropriate. CDBG program participant tracking shall utilize the template Adelante designed with City's CYD and as proposed in the Work Plan attached to application.
APPLICANT	**Esperanza Shelter** — **FUNDING REQUEST** [redacted]
PROPOSED PROJECT	Emergency Assistance Program
SUMMARY OF REQUEST	Helps victims of domestic violence with 60 days of rent or utility payments
CDBG FUNDING HISTORY	2011 ($27K); 2012 ($16K); 2014($20K funded/$16K spent)
ANALYSIS	Some project history; not Housing category as indicated in application
FUNDING CONSIDERATIONS	Public Service (15% cap). Project falls under "subsistence payments" and comes with HUD limitations: can provide short-term subsidies to defray rent and utility arrears for families, security deposits, and other similar subsidies. In addition to public service category limit, HUD imposes a 90 day limit or $1,000 per client; many are one-time recipients. The City's Human Services Division funded Esperanza $45K in prior year that was unspent. Applicant has had past difficulties with timeliness of project execution, audit findings and HUD findings.
APPLICANT	***Interfaith Shelter*** — **FUNDING REQUEST** [redacted]
PROPOSED PROJECT	Women's Summer Safe Haven (WSSH)
SUMMARY OF REQUEST	WSSH will provide safety, security and community for 20-30 women per night from May through October 2017
CDBG FUNDING HISTORY	None, however Interfaith has demonstrated significant Federal, Local, and Private matched funding
ANALYSIS	No project history, but in 2016 City's HSD funded $25K seed money for this project for which Interfaith then leveraged $100K in federal and other funding sources.
FUNDING CONSIDERATIONS	Public Service (15% cap); Demonstrates service gap in the community for summer months. Similarities to Esperanza's service in that a portion of clients served for battered families are also served by Interfaith and Solace Crisis Center. Already receiving MFA/HUD funding for this project ($55K) through an unspecified source. Receiving over ½ million in other resources. Shelter brings counseling and other services to women while there, LifeLink, Solace, art therapy programs, etc.

			CDBG
APPLICANT	**Youth Shelters Street Outreach**	**FUNDING REQUEST**	**$20,551**
PROPOSED PROJECT	Expansion of street outreach project for homeless youth by adding the number of youth served		
SUMMARY OF REQUEST	Hiring an additional street outreach worker will allow YS to reach more youth and service hours will be doubled from 25hrs/wk50 hours/wk. Will also allow expansion of drop in center hours, adding Sundays, to provide more intensive case management services.		
CDBG FUNDING HISTORY	Funded for street outreach and drop-in center in 2010 ($39,750); 14 homeless youth for transitional living program in 2012 ($10,000); Life Skills Coach in 2013 ($10,000); Street outreach in 2015 ($12,000); 2016 ($20,551-same amt)		
ANALYSIS	Public Service (15% cap). As of Q2 this project served 260 identified youthof500 *to be served as obligated in contract. Currently* providing 25hrs./w with 1 worker		
FUNDING CONSIDERATIONS	Street outreach captures youth at the homeless stage to get them connected to services, utilizing the drop-in center, with the goal of getting them into their transitional housing program; unfortunately YS cannot report on the youth served from street outreach to ultimately end up in housing (issue every year to get this estimated #) Meeting goals for current year project with 260 youth served to date with outreach; Enhanced reporting methods to track long term goals is needed.		
			CDBG
APPLICANT	**St Elizabeth Shelter**	**FUNDING REQUEST**	**$129,157**
PROPOSED PROJECT#1 (CDBG)	Casa Cerillos Rental Rehab (CDBG)		
SUMMARY OF REQUEST	Attic and ventilation renovation for 2-story, 28-unit permanent supportive transitional housing apartments zoned C-2		
[redacted]	CDBG funds: 2007 ($20,000); 2008 ($20,000); 2010 ($10,000) 2014 ($73,000forSiringoSr. Housing rehab); 2016 ($50,000 for Casa Familia rehab)		
ANALYSIS	Rental Rehab (no cap). Will support 40 residents for 2017-2018.		
FUNDING CONSIDERATIONS	Rental rehab for very low income residents is a high priority need; Three bids were obtained that support the application and the overall funding request is based on the lowest bid and the cost of previously renovating the first unit; experience with Davis-Bacon reporting; uses licensed contractors cleared in SAM, and work is slated for completion in summer months, to be completed by end of Q1. Funding at request is appropriate.		
			AHTF
PROPOSED PROJECT#2 (AHTF)	Siringo Senior Housing rental rehabilitation	**FUNDING REQUEST**	**$63,840**
SUMMARY OF REQUEST	Bathroom remodel for eight (8) very low-income senior apartments zoned R-21 PUD		
AHTF FUNDING HISTORY	Casa Familia Mortgage buy-down was funded in 2015 ($12,000) but no AHTF funding history for this specific project		
ANALYSIS	Not clear whether the improvements are the first essential tasks of many phases in ADA compliance; working towards full compliance over time.		
FUNDING CONSIDERATIONS	Received CDBG funding in 2014 for same facility; completed the project in Q1; No leverage/match calculations located in the application.		
			[redacted]
APPLICANT	**YouthWorks!**	**FUNDING REQUEST**	[redacted]
PROPOSED PROJECT#1 (CDBG)	Facility Improvement		
SUMMARY OF REQUEST	Solar equipment, showers		

CDBG FUNDING HISTORY	2010 ($133K); 2013 ($22K); 2014 ($45K); 2015 ($45K), 2016 ($38K: $26K for facility improvement and $12K to forfeited Dreamer's project).		
ANALYSIS	The center served a total of 533 youth for its 2014 facility improvement contract. C-2 zoning (commercial)		
FUNDING CONSIDERATIONS	The application states a change in land use is not triggered, however, the shower portion of work scope, at minimum, is not eligible without land use review; may require approval of a Special Use Permit or Variance adding time to this project. Issues with timely reporting and currently working to fix admin issue on 2015 project. City's Children and Youth Division currently provides YW $85K for programs and not $4K as application states. "Area Benefit" does not apply if they are proposing to serve youth citywide (both stated but must be one or other). Provides cost breakdown in case a portion of the application were eligible. City also provides significant funding via workforce development (thru economic development division). Cannot justify funding w/o bids or estimates, which are mentioned, but not included.		
			AHTF
PROPOSED PROJECT #2 (AHTF)	Shelter Now Project	FUNDING REQUEST	$51,800
SUMMARY OF REQUEST	Funding would support a per-youth/per-day cost for emergency sheltering. Shelter Now is a collaborative of service providers that would work to provide shelter at a weekly rotating shelter location with YW as fiscal sponsor.		
AHTF FUNDING HISTORY	None		
FUNDING CONSIDERATIONS	No history with AHTF funding. Concept of "emergency shelter voucher", how this would operate and AHTF eligibility an issue, as per person housing cost vs. per person service cost are not demonstrated. AHTF has funded apartment vouchers via experienced service providers (Life Link) but no record of shelter vouchers; later in the application it states "support for facility rental" so it is unclear if this is to fund a voucher for youth to use at a shelter or overall rent for a facility		
		CDBG	**AHTF**
APPLICANT	**Santa Fe Recovery Center**	**FUNDING REQUEST**	**None**
PROPOSED PROJECT	Facility Improvement		
SUMMARY OF REQUEST	Fixing previously poorly constructed HVAC vents; fixing linoleum counter and floor		
CDBG FUNDING HISTORY	2009 ($43,300); 2010 ($16,359); 2012 ($121K-forfeited); 2014 ($7,000); 2015 ($35,000)		
ANALYSIS	600 individuals served at the center annually; improvements might help welfare of residents and workers		
FUNDING CONSIDERATIONS	No committed funding or work plan to indicate timeline, budget. No bids to justify funding request; items identified in work scope do not qualify for CDBG (countertop repair) unless applicant justified a safety/health improvement.		

SUMMARY OF FUNDING TOTALS	FUNDING REQUEST			AHTF
HOUSING (NO CAP)	HOUSING TRUST DPA (2AHTFapplications at $75K and $150K)		~~200,000~~ 100K	~~225,000~~
	HABITAT HI		60,000	
	HOMEWISE HI	21,250 –	~~100,000~~	
	HOMEWISE DPA		~~200,000~~ 100K	~~250,000~~
	ST. ELIZABETH'S SIRINGO APARTMENTS			63,840
	ST. ELIZABETH'S CASA CERILLOS		43,750	
	SUBTOTAL HOUSING		**$603,750**	**$538,840**
PUBLIC SERVICE (15% CAP-CDBG)	NEW MEXICO LEGAL AID	80.2	~~15,000~~	
($75,000 TOTAL FUNDING LIMIT)	KITCHEN ANGELS	75.2	~~30,000~~	
	SFPS ADELANTE ELEMENTARYSCHOOL LIAISON	76	30,000	
	ESPERANZA	73.67	~~32,500~~	
	INTERFAITH COMMUNITY SHELTER	65.67	~~65,000~~ 24,449	
	YOUTH SHELTERS	73	20,551	
	~~YOUTH WORKS SHELTER NOW~~			~~51,800~~
	SUBTOTAL PUBLIC SERVICE		**$193,051**	**$51,800**
PUBLIC FACILITIES (NO CAP)	SANTA FE RECOVERY CENTER		~~50,000~~	
	YOUTH WORKS!		~~65,000~~	
	SUBTOTAL PUBLIC FACILITIES		**$115,000**	**$0**
Grand Totals			**$911,801**	**$590,640**
			CDBG	**AHTF**
FUNDING LIMITS			**$400,000***	**$400,000**

***EXPLANATION (CDBG)**-Percentages for limit categories below will adjust up/down based on actual final allocation.

Estimated Total 2016-2017 Funding	**$500,000**
(minus Administration)	**$100,000**
Total project funding	**$400,000**
Public Service Limit not to exceed 15%	**$75,000**

RFP 17/22 - CDBG Score Sheet			Evaluator	Evaluator	Evaluator	Evaluator	Evaluator	Evaluator	
Applicant	Max Score	Funding Request	Hughes	Lopez	Goblet	Peterson	Padilla	Villareal	Average Score
#1- Housing Trust		Down Payment Asst ($200K)							
Scoring Criteria	100	Activity	100	100	100	60	80	80	86.66667
	100	National Objective Compliance	100	80	100	80	80	60	83.33333
	50	Consolidated Plan Compliance	20	50	50	50	40	50	43.33333
	50	Budget	30	50	50	50	40	40	43.33333
	100	Performance/Work Plan	60	100	100	100	100	80	90
									69.33333
#2 - Habitat for Humanity		SF Home Impr. ($60K)							
Scoring Criteria	100	Activity	80	100	100	Abstained	100	100	96
	100	National Objective Compliance	100	100	100		100	80	96
	50	Consolidated Plan Compliance	40	50	50		50	50	48
	50	Budget	50	50	50		50	50	50
	100	Performance/Work Plan	80	100	100		100	100	96
									77.2
#3 - Homewise		Home Impr. ($100K)							
Scoring Criteria	100	Activity	80	100	80	60	80	80	80
	100	National Objective Compliance	100	100	70	100	80	60	85
	50	Consolidated Plan Compliance	40	50	50	50	30	50	45
	50	Budget	50	50	50	50	50	30	46.66667
	100	Performance/Work Plan	100	100	100	100	100	100	100
									71.33333
#4 - Homewise		Down Payment Asst ($200K)							
Scoring Criteria	100	Activity	80	100	80	60	80	80	80
	100	National Objective Compliance	80	80	80	80	80	60	76.66667
	50	Consolidated Plan Compliance	50	50	50	50	40	50	48.33333
	50	Budget	50	50	50	50	50	30	46.66667
	100	Performance/Work Plan	100	100	100	100	100	100	100
									70.33333
#5- NM Legal Aid		Foreclosure Legal Asst ($15K)							
Scoring Criteria	100	Activity	80	100	100	80	80	100	90
	100	National Objective Compliance	100	100	100	80	160	80	103.3333
	50	Consolidated Plan Compliance	40	50	50	50	80	50	53.33333
	50	Budget	50	50	50	50	100	50	58.33333
	100	Performance/Work Plan	100	100	100	100		80	96
									80.2

#6 - Kitchen Angels		Home delivered meals ($30k)							
Scoring Criteria	100	Activity	100	100	100	80	Abstained	100	96
	100	National Objective Compliance	80	100	100	80		80	88
	50	Consolidated Plan Compliance	50	50	50	40		30	44
	50	Budget	50	50	50	50		40	48
	100	Performance/Work Plan	100	100	100	100		100	100
									75.2
#7 - Adelante		Elementary Sch. Liaison							
Scoring Criteria	100	Activity	100	100	100	100	100	100	100
	100	National Objective Compliance	100	100	100	100	100	100	100
	50	Consolidated Plan Compliance	50	50	50	50	50	50	50
	50	Budget	50	50	50	50	40	40	46.66667
	100	Performance/Work Plan	100	100	80	60	80	80	83.33333
									76
#8 - Esperanza		Rental/subsistence payments							
Scoring Criteria	100	Activity	100	100	100	80	100	100	96.66667
	100	National Objective Compliance	80	100	100	100	80	80	90
	50	Consolidated Plan Compliance	40	50	50	50	50	50	48.33333
	50	Budget	30	50	50	50	50	30	43.33333
	100	Performance/Work Plan	60	100	100	100	100	80	90
									73.66667
#9 - Interfaith Shelter		Women's Supportive Shelter							
Scoring Criteria	100	Activity	100	100	100	100	100	80	96.66667
	100	National Objective Compliance	100	100	0	100	100	80	80
	50	Consolidated Plan Compliance	40	50	0	50	50	50	40
	50	Budget	50	50	0	50	50	30	38.33333
	100	Performance/Work Plan	80	100	0	80	100	80	73.33333
									65.66667
#10 - Youth Shelters		Street outreach ($20,551)							
Scoring Criteria	100	Activity	80	100	100	100	100	100	96.66667
	100	National Objective Compliance	80	100	100	100	50	100	88.33333
	50	Consolidated Plan Compliance	30	50	50	50	40	50	45
	50	Budget	40	50	50	50	100	40	55
	100	Performance/Work Plan	40	100	100	100		60	80
									73

#11 - St. Elizabeth Shelter		Casa Cerrillos ($43,750)							
Scoring Criteria	100	Activity	80	100	100	80	40	80	80
	100	National Objective Compliance	100	100	100	100	60	80	90
	50	Consolidated Plan Compliance	40	50	50	50	30	50	45
	50	Budget	50	50	50	50	20	50	45
	100	Performance/Work Plan	100	100	100	80	60	80	86.66667
									69.33333
#12 - Youth Works!		Facility Improvement (65K)							
Scoring Criteria	100	Activity	40	100	100	40	80	80	73.33333
	100	National Objective Compliance	40	100	80	40	100	80	73.33333
	50	Consolidated Plan Compliance	30	50	50	30	40	50	41.66667
	50	Budget	40	50	30	20	30	40	35
	100	Performance/Work Plan	80	100	80	60	80	80	80
									60.66667
#13 - Santa Fe Recovery Ctr		Facility Improvement ($50K)							
Scoring Criteria	100	Activity	40	60	50	40	80	80	58.33333
	100	National Objective Compliance	40	100	75	60	60	80	69.16667
	50	Consolidated Plan Compliance	20	30	50	40	40	50	38.33333
	50	Budget	30	30	30	20	30	50	31.66667
	100	Performance/Work Plan	20	60	70	60	60	80	58.33333
									51.16667

RFP 17/28 AHTF Score Sheet

Applicant	Max Score	Project Name/Funding Request	Evaluator Hughes	Evaluator Lopez	Evaluator Goblet	Evaluator Peterson	Evaluator Padilla	Evaluator Villareal	Average Score
Housing Trust		Arroyo Central Down Payment Asst ($75K)							
Scoring Criteria	**100**	Funding	100	100	80	80	80	100	90
	200	Need/Benefit/Project Feasibility	200	200	200	160	200	70	171.6667
	100	Affordability	100	100	100	100	80	80	93.33333
	100	Demonstrated Capability/Organizational Mgmt	100	100	100	100	100	100	100
									113.75
Housing Trust		Down Payment Asst ($150K)							
Scoring Criteria	**100**	Funding	100	100	100	80	80		92
	200	Need/Benefit/Project Feasibility	200	200	200	120	200		184
	100	Affordability	100	100	80	100	80		92
	100	Demonstrated Capability/Organizational Mgmt	100	100	100	100	100		100
									117
Homewise		Down Payment Asst ($250K)							
Scoring Criteria	**100**	Funding	100	100	70	80	80	100	88.33333
	200	Need/Benefit/Project Feasibility	200	200	150	120	160	120	158.3333
	100	Affordability	100	100	70	100	80	80	88.33333
	100	Demonstrated Capability/Organizational Mgmt	100	100	100	100	100	100	100
									108.75

YouthWorks!		Shelter Now!							
Scoring Criteria	**100**	Funding	100	100	100	40	80	100	86.66667
	200	Need/Benefit/Project Feasibility	160	200	180	120	120	120	150
	100	Affordability Demonstrated	80	100	100	100	80	100	93.33333
	100	Capability/Organizational Mgmt	100	100	80	60	80	60	80
									102.5
St. Elizabeth's Shelter		Siringo Senior Apt Rehab ($63,840)							
Scoring Criteria	**100**	Funding	60	20	75	20	60	60	49.16667
	200	Need/Benefit/Project Feasibility	160	200	200	120	80	160	153.3333
	100	Affordability Demonstrated	100	100	100	100	80	100	96.66667
	100	Capability/Organizational Mgmt	80	100	100	100	60	100	90
									97.29167