



## Barnes Fall 2023 Round 12 ARPA Grant #3: Shared Equity Scoring Matrix

Thresholds: Staff					
Section I: Minimum Standards: Required Elements (Yes/No)		#1. Complete Application	#2. Audit/Financials	#3. Organizational Information	#4. Due Diligence: Site Control/Zoning
Required Elements	Yes/No Each of these items must be checked off as a YES in order to be considered for funding.	Application is complete. All questions are answered thoroughly throughout the entire narrative.  All required uploads are attached, including Universal Design Matrix, Affirmative Marketing Plan, homeowner education plan, Energy Efficiency & Sustainability Matrix, and DEAI Matrix.	For organizations with annual budget above \$500,000: - Audit for lead applicant organization completed within the past 24 months with no findings.  For organizations with annual budgets of \$200,000-\$500,000: - Financials completed by independent CPA.  Organizations must show positive operational cash flow and positive net worth.	Organizational Information is complete. Applicant/Lead Organization must be a 501(c)3 nonprofit organization.  No part of leadership team is involved in a lawsuit.  Portion of administration (developer) fee to be paid by Barnes is no more than 20% of the project's total Barnes grant request.  <i>Details will be required in Questions 5 &amp; 7.</i>	Applicant has described their due diligence in terms of zoning, permitting, and codes and has provided name of Metro official met with.  On question 8, they've provided required details about zoning, and  on question 12, they've specified the level of design for the project (design development, construction, schematics, concept).
<b>NOTE: If any of the Minimum Standards Criteria is not met, staff will not advance the proposal for further consideration.</b>					
Section II: Required Elements (Scored)		Exceptional 10 points	Strong 7 points each	Needs Improvement 5 points each	Missing Information 3 - 0 points each
Organization	#5. Team Experience and Capacity	The team is comprised of organizations with deep experience (11+ yrs) building similar housing: - Development and construction - Creating or preserving housing for shared equity homeownership for populations with incomes at or below 80% AMI with historical barriers and demonstrated inequities in homeownership.  ___ of projects completed over ___ years	Multiple organizations, at least one member of leadership team has significant (8-11 years) experience building similar housing: - Development and construction - Creating or preserving housing for shared equity homeownership for populations with incomes at or below 80% AMI with historical barriers and demonstrated inequities in homeownership.  ___ of projects completed over ___ years	Team is comprised of 2 organizations. At least one member of leadership team has some (5-8 yrs) experience building similar housing: - Development and construction - Creating or preserving housing for shared equity homeownership for populations with incomes at or below 80% AMI with historical barriers and demonstrated inequities in homeownership.  ___ of projects completed over ___ years	3 pts: The application represents a single organization with no partners. At least one member of leadership team has limited (3-5 years) experience building similar housing.  0 pts: No one on leadership team has more than 3 years experience building similar housing.  Project demonstrates no expertise in shared equity models.  ___ of projects completed over ___ years
Project Funding	#6. Funding Sources and Uses	Barnes request is <u>no more than 50%</u> of budget and organization has <u>committed funding for remaining balance</u> . Funding sources may include private loan, non-federal match, and/or organizational equity. Letters of commitment or similar confirmations attached in the upload. Catalyst Fund cannot be used.	Barnes request is <u>more than 50%</u> of budget and organization has <u>committed funding for remaining balance</u> . Funding sources may include private loan, non-federal match, and/or organizational equity. Letters of commitment or similar confirmations attached in the upload. Catalyst Fund cannot be used.	Barnes request is <u>no more than 50%</u> of budget, organization has <u>committed funding for at least 40% of project</u> , but has <u>tentative funding for remaining balance</u> . Funding sources may include private loan, non-federal match, and/or organizational equity. Letters of commitment for committed funds are attached, plus explanation of status for tentative funding. Catalyst Fund cannot be used.	3 pts: Barnes request is <u>no more than 50%</u> of budget, but organization has only <u>tentative funding for remaining balance</u> .  0 pts: Barnes request is <u>more than 50%</u> of budget, organization has only <u>tentative funding for remaining balance</u> .

Project Funding	#7. Administration Fee	<p>Portion of administration (developer) fee to be paid by Barnes is <u>10% or less</u> of the project's total Barnes grant request, and Applicant has <u>written agreements</u> for committed consultancies or partnerships including legal, financial, and shared equity development expertise.</p>	<p>Portion of administration (developer) fee to be paid by Barnes is <u>no more than 15%</u> of the project's total Barnes grant request, and Applicant has <u>cost estimates</u> for prospective consultancies or partnerships including legal, financial, and shared equity development.</p>	<p>Portion of administration (developer) fee to be paid by Barnes is <u>no more than 20%</u> of the project's total Barnes grant request, and Applicant has <u>informal agreements</u> with partners with rough estimates of associated costs.</p>	<p>3 pts: Portion of administration (developer) fee paid by Barnes is <u>more than 20%</u> of the project's total Barnes grant request. Applicant has informal agreements with partners with <u>rough estimates</u> of associated costs.</p> <p>0 pts: Proposal fails to showcase thorough research into the costs associated with the creation of shared equity homeownership.</p>
Project Approach	#8. Site Control & Zoning & Timeline	<p>If requesting Metro-owned property, 99-year ground lease or land trust is specified.</p> <p>If not, site is owned by the applicant (deed in hand), or 99-year ground lease.</p> <p>A) Property is zoned for the development. OR B) If property IS NOT zoned: Applicant has verified with Metro Planning staff that rezoning is feasible (provided that Metro Council approves). Includes a.Council Member letter of support for project and b.Date of conversation and contact info for Planning Staff involved in verification conversation.</p> <p>Proposal clearly demonstrates how the project will be completed and funds expended by 12/31/26.</p>	<p>If requesting Metro-owned property, 99-year ground lease or land trust must be specified.</p> <p>If not, site has a signed sales contract or purchase option and is currently zoned for the proposed development.</p> <p>Proposal clearly demonstrates how the project will be completed and funds expended by 12/31/26.</p>	<p>Site is owned by the applicant or has 99-year ground lease, but is not zoned for the proposed development and no verification is provided as required by question 8.</p> <p>Proposal clearly demonstrates how the project will be completed and funds expended by 12/31/26.</p>	<p>2 pts: Site has a signed sales contract or purchase option but requires rezoning for the proposed development.</p> <p>0 pts: Build site is not identified or is without site control and not zoned for the development.</p>
<p><b>Total Required Elements Sections I &amp; II points available: 40. Applicants must meet threshold of at least 20 points available to continue to Section III: Evaluation Criteria (Scored).</b></p>					
<p><b>External Review Committee</b></p>					
Section III: Evaluation Criteria (Scored)		<p><b>Exceptional 15 points</b></p>	<p><b>Strong 10 points</b></p>	<p><b>Needs Improvement 7 - 5 points</b></p>	<p><b>Missing Information 3 - 0 points</b></p>
Project Approach	#9. Project Type	<p>Proposal describes robust plan for how shared equity housing will be undertaken, i.e., through new construction and/or acquisition and rehab.</p> <p>Applicant has demonstrated thoughtful approach to creating shared equity housing.</p>	<p>Proposal describes basic plan for how shared equity housing will be undertaken, i.e., through new construction and/or acquisition and rehab. Applicant has demonstrated thoughtful approach to creating shared equity housing.</p>	<p>Proposal describes very basic or incomplete plan for how shared equity housing will be undertaken, i.e., through new construction and/or acquisition and rehab.</p>	<p>2 pts: Proposal shares minimal information about how shared equity housing will be undertaken.</p> <p>0 pts: Proposal does not explain how shared equity housing will be undertaken.</p>

<p>Project Approach</p>	<p><b>#10. Marketing and Outreach</b></p>	<p>Project includes robust marketing plan for reaching populations with historical barriers and demonstrated inequities in homeownership with reliable data sources (see Grant Policy).</p> <p>Affirmative Marketing Plan is included showing how applicant will</p> <ul style="list-style-type: none"> <li>- reach multiple cultural communities, neighborhoods, and languages</li> <li>- collaborate with more than one trusted community organization</li> <li>- develop significant homebuyer relationships</li> <li>- shows a strong commitment to understanding the current community needs through assets such as a community needs assessment, survey, or other such data analysis</li> </ul>	<p>Project includes basic marketing plan for reaching populations with historical barriers and demonstrated inequities in homeownership with reliable data sources (see Grant Policy).</p> <p>Affirmative Marketing Plan is included showing how applicant will</p> <ul style="list-style-type: none"> <li>- reach multiple cultural communities, neighborhoods, and languages</li> <li>- collaborate with one trusted community organization</li> <li>- develop modest homebuyer relationships</li> <li>- has done some data analysis to understand community needs</li> </ul>	<p>Project includes basic marketing plan for reaching populations with historical barriers and demonstrated inequities in homeownership (see Grant Policy) but plan is incomplete.</p> <p>Affirmative Marketing Plan is not included.</p> <p>Proposal has minimal plans to</p> <ul style="list-style-type: none"> <li>- reach multiple cultural communities, neighborhoods, and languages</li> <li>- does not collaborate with trusted community organization</li> <li>- Data provided is sparse, generalizations, or not included.</li> </ul>	<p>2 pts: No Affirmative Marketing Plan is included and outreach plan is not geared toward the target population of those with historical barriers or demonstrated inequities in homeownership.</p> <p>0 pts: No outreach plan is included.</p>
<p>Project Approach</p>	<p><b>#11. Participant Engagement Details</b></p>	<p>Proposal includes the following:</p> <ul style="list-style-type: none"> <li>- Robust plan for educating homeowners about shared equity homeownership pre- and post-purchase.</li> <li>- Demonstrates experience working with multiple populations</li> <li>- Shows a strong understanding of all aspects and challenges of shared equity housing</li> <li>- Sets a path for educating partners (lenders, philanthropic partners, city officials) and the community on the shared equity model.</li> </ul> <p>Applicants show how lessons learned can be used to replicate the model for shared equity housing.</p>	<p>Proposal includes the following:</p> <ul style="list-style-type: none"> <li>- Basic plan for educating homeowners about shared equity homeownership pre- and post-purchase.</li> <li>- Demonstrates some experience working with diverse populations</li> <li>- Shows some understanding of all aspects and challenges of shared equity housing</li> <li>- Shows how they will educate partners (lenders, philanthropic partners, city officials) and the community on the shared equity model.</li> </ul>	<p>Proposal includes the following:</p> <ul style="list-style-type: none"> <li>- Outline for educating homeowners about shared equity homeownership pre- and post-purchase.</li> <li>- Shows limited understanding of all aspects and challenges of shared equity housing</li> </ul>	<p>Proposal indicates a desire to educate homeowners but lacks a robust plan.</p> <p>No experience with aspects and challenges of shared equity housing is demonstrated.</p>

Project Approach	#12. Quality Design	<p>Designs are sustainable, high-quality, and considerate to neighborhood character, changes, and expectations.</p> <ul style="list-style-type: none"> <li>- Project is sensitive to Universal Design and visitability standards.</li> <li>- At least 10 of the criteria on the Universal Design Checklist are met, and meeting 2 or more additional design criteria will be considered in the scoring matrix. The checklist is included with application.</li> </ul> <p>For new construction, write ups are considered design level or are stock plans. Construction drawings, site and architecture plans are included.</p>	<p>Designs are sustainable, high-quality, and considerate to neighborhood character, changes, and expectations.</p> <ul style="list-style-type: none"> <li>- Project is sensitive to Universal Design and visitability standards.</li> <li>- 10 of the criteria on the Universal Design Checklist are met.</li> <li>- 1 additional design criterion is added. The checklist is included with application.</li> </ul> <p>For new construction, write ups are considered schematic level.</p>	<p>Project includes few aspects of inclusive, sustainable, and/or welcoming design concepts.</p> <p>Architecture, site plans, and construction write ups are considered concept level.</p>	<p>No inclusive design aspects are included in project proposal.</p> <p>Site plans, construction write-up, and architecture plans are rough outlines with only basic information (2 pts), or</p> <p>no plans are included or are missing information (0 pts).</p>
Project Approach	#13. Sustainability & Resilience	<p>Applicant goes above and beyond sustainability and resiliency requirements such as reduced environmental impacts and ability to withstand a variety of extreme weather events. Project includes 5 or more criteria from the Energy Efficiency &amp; Sustainability Checklist as well as additional criteria. Funding proposal includes some of the following:</p> <ul style="list-style-type: none"> <li>- resource conservation</li> <li>- heat mitigation</li> <li>- access to green space</li> <li>- use of more stringent building codes than required</li> <li>- access to multimodal transit options</li> <li>- or other measures generally accepted as sustainable or resilient in excess of what is required in the checklists. Checklist is submitted with application.</li> </ul>	<p>Applicant addresses sustainability and resiliency requirements such as reduced environmental impacts and ability to withstand a variety of extreme weather events. Project includes 4 criteria from the Energy Efficiency &amp; Sustainability Checklist as well as additional criteria.</p> <p>Funding proposal includes some of the following:</p> <ul style="list-style-type: none"> <li>- resource conservation</li> <li>- heat mitigation</li> <li>- access to green space</li> <li>- use of more stringent building codes than required</li> <li>- access to multimodal transit options</li> <li>- or other measures generally accepted as sustainable or resilient in excess of what is required in the checklists.</li> </ul>	<p>Applicant demonstrates some commitment to sustainability and resilience by incorporating one or two additional sustainability or resilience measures beyond what is required in checklists.</p> <p>Funding proposal includes one or two of the following:</p> <ul style="list-style-type: none"> <li>- resource conservation</li> <li>- heat mitigation</li> <li>- access to green space</li> <li>- use of more stringent building codes than required</li> <li>- access to multimodal transit options</li> <li>- or other measures generally accepted as sustainable or resilient in excess of what is required in the checklists.</li> </ul>	<p>Proposal does not include evidence of sustainability and resilience measures beyond what is required in checklists, or</p> <p>Applicant does not commit to items required in checklists.</p>
		<b>5 points each</b>	<b>4 points each</b>	<b>3 points each</b>	<b>2 - 0 points each</b>
Project Approach	#14. Access to Transit	<p>The housing units are located near a frequent transit corridor and within 0.25 walkable miles of a public transit stop.</p> <p>Education for residents is provided about transit access, including: accessible ride information, route information, provided greenway maps, and/or Transportation Demand Management (TDM) information.</p>	<p>The housing units are located near a frequent transit corridor and between 0.25 and 0.5 walkable miles of a public transit stop.</p> <p>If not walkable 0.25 - 0.5 mile of a transit stop, mitigation is provided by the development which may include transit to a transit access point.</p>	<p>The housing units are located near a frequent transit corridor and within 0.75 walkable miles of a public transit stop.</p> <p>If not walkable 0.75 mile of a transit stop, mitigation is provided by the development which may include transit to a transit access point.</p>	<p>2 pts: The housing units are located near a frequent transit corridor or local service corridor and within 1 walkable mile of a public transit stop or further but transit is not provided.</p> <p>0 pts: The housing units are not within 1 mile of any public transit stops, and no other transit is provided.</p>
<b>Total Points available for Section III: 80</b>					
<b>Total Points available for Sections I, II, and III before Bonus Points Section: 120 Applicants must have a cumulative score of at least 50 points before bonus points to be considered for funding.</b>					
Section IV: Bonus Points (Scored)	<b>Exceptional 5 points</b>	<b>Strong 4 points</b>	<b>Needs Improvement 3-2 points</b>	<b>Missing Information 0 points</b>	

<b>Bonus</b>	<b>#15. Diversity, Equity, Accessibility &amp; Inclusion</b>	<p>Applicant goes above and beyond representation in terms of equity. Board and staff are representative of the communities they serve.</p> <p>Proposal includes 5 to 7 examples of additional efforts for practices from DEAI Matrix.</p>	<p>Applicant includes some measures of DEAI work beyond representation in terms of equity, including 3 or 4 examples of additional efforts for practices from DEAI Matrix.</p>	<p>Applicant has some DEAI measures in place that meet basic standards of inclusion including but not limited to:</p> <ul style="list-style-type: none"> <li>A) Staff/board training</li> <li>B) Moderate representation through board or staff of the populations served</li> <li>C) Required zoning community feedback</li> <li>D) Some resident connection points (3 pts).</li> </ul> <p>Proposal includes basic DEAI measures for limited minority representation or populations served (2 pts).</p>	<p>Applicant has limited representative DEAI measures including but not limited to:</p> <ul style="list-style-type: none"> <li>A) Little or no accessibility</li> <li>B) Staff or board representation of minority/women is not significantly representative of the populations served (1 pt).</li> </ul> <p>There are no visible DEAI measures taken by the applicant organization outlined by the provided narrative (0 pts).</p>
		<b>Bonus</b>	<b>Deeply Affordable Housing</b>	<p>Units below 60% AMI are included in the development in a meaningful way (&gt;10% of included units).</p>	<p>Units below 60% AMI are included in the development in a meaningful way (5% or more of included units).</p>

<p><b>Bonus</b></p>	<p><b>#16. Healthy Communities</b></p>	<p>Project is carefully designed to address the physical and behavioral health needs of residents.                      Proposal promotes healthy, stable living conditions and incorporates health-conscious features and amenities into design.</p> <p>Applicant demonstrates desire to create effective, sustainable health interventions and shows concerted effort to</p> <ul style="list-style-type: none"> <li>- research health disparities within the community</li> <li>- seek input from residents, community members, and public health professionals</li> <li>- strive to be preventive in nature and address neighborhood conditions or barriers to health resources.</li> </ul> <p>Bonus points will be considered for applicants who demonstrate that they have assessed research, learned about health needs and inequities within the development's community, and has utilized data or analysis of projects intended and unintended impacts on Social Determinants of Health (SDOH), or has developed evidence-driven strategies to address health equity issues.</p>	<p>Applicant demonstrates desire to create effective, sustainable health interventions and shows concerted effort to</p> <ul style="list-style-type: none"> <li>- research health disparities within the community</li> <li>- seek input from residents, community members, and public health professionals</li> <li>- strive to be preventive in nature and address neighborhood conditions or barriers to health resources.</li> </ul> <p>and</p> <p>Project shows effort to address the physical and behavioral health needs of residents.                      Proposal incorporates a number of health-conscious features and amenities into design tied to the research and input received.</p>	<p>Applicant plans to assess physical/health needs such as conducting health screenings of current residents and then to address those findings (i.e., building in walking paths or exercise rooms to address effects of sedentary lifestyles).</p> <p>and/or</p> <p>Applicants plans to address several health needs, barriers, and inequities by creating targeted efforts to improve living conditions, lessen safety concerns, and/or provide disability accommodations.</p>	<p>The applicant shows basic efforts to understand health needs and inequities within the community where the development will be located.</p> <p>and/or</p> <p>The proposal includes basic health interventions, features, or design considerations that promote general health benefits for residents. There are no health measures taken by the applicant organization.</p>
<p><b>Bonus</b></p>	<p><b>#17. Urban Zoning Overlay (UZO)</b></p>	<p>All units are located within the Urban Zoning Overlay</p>	<p>Greater than 50% of the units are located within the Urban Zoning Overlay</p>	<p>Less than 50% of the units are located in the Urban Zoning Overlay</p>	<p>No units are located within the Urban Zoning Overlay</p>
<p><b>Bonus</b></p>	<p><b>#18. Walkability and Food Access</b></p>	<p>Preference will be given to accessible, connected developments. Determine the walk score for the proposed development including transit access, walkability and amenity access including access to grocery stores at <a href="https://www.walkscore.com/">https://www.walkscore.com/</a></p>	<p>Development is somewhat accessible and connected. Determine the walk score for the proposed development including transit access, walkability and amenity access including access to grocery stores at <a href="https://www.walkscore.com/">https://www.walkscore.com/</a></p>	<p>Development is minimally accessible and connected. Determine the walk score for the proposed development including transit access, walkability and amenity access including access to grocery stores at <a href="https://www.walkscore.com/">https://www.walkscore.com/</a></p>	<p>Development is not accessible or connected. Determine the walk score for the proposed development including transit access, walkability and amenity access including access to grocery stores at <a href="https://www.walkscore.com/">https://www.walkscore.com/</a></p>
<p><b>Bonus points available: 25 pts. Total Points available for all Sections including Bonus: 145</b></p>					