

BARNES HOUSING TRUST FUND
ROUND 16 REQUEST FOR FUNDING APPLICATIONS
SCORING MATRIX

OWNER-OCCUPIED REHAB PROJECTS

THRESHOLD CRITERIA

Application Deadline	The application was submitted by the deadline.	YES/NO
Nonprofit Documentation	<p>Applicant is a Nonprofit</p> <p>501(c)(3) or 501(c)(6) designation by the IRS</p> <p>Copy of Articles of Incorporation and By-laws</p> <p>Active status as a registered Business Entity with the Tennessee Secretary of State</p> <p>Registration with the Tennessee Secretary of State Office of Charitable Solicitations indicating the organization is currently registered to solicit public funds in the Tennessee as of the date of the application (<i>new requirement</i>)</p> <p>Nonprofit Grants Manual Acknowledgement Form signed by the Board Chair (<i>new requirement</i>)</p> <p>Applicant Certification Statement signed by the applicant's authorized representative</p> <p>Annual audit conducted by an independent CPA in accordance with generally accepted auditing standards for the most recently completed fiscal year or issued within the preceding 12 months of the application deadline</p>	YES/NO
Applicant Certifications	<p>There are no outstanding legal judgements or adverse findings resulting from Fair Housing, wage payments, or OSHA violations against the Applicant.</p> <p>There are no outstanding legal judgements or adverse findings resulting from Fair Housing, wage payments, or OSHA violations against any member of the Development/Project Team.</p>	YES/NO
Administrative Fee	The Administrative Fee does not exceed 20% of the funding request.	YES/NO

HOUSING SECURITY		35 POINTS
Income Targets (Maximum 8 points)	Targets at least 5% of Barnes Fund homes affordable to ≤60% AMI OR	2 points
	Targets 6-10% of Barnes Fund homes affordable to ≤60% AMI OR	4 points
	Targets 11-15% of Barnes Fund homes affordable to ≤60% AMI OR	6 points
	Targets 16-20% of Barnes Fund homes affordable to ≤60% AMI	8 points
Affirmative Marketing (Maximum 10 points)	Applicant has a detailed Marketing Plan to provide outreach to populations least likely to apply and to organizations that represent/serve populations that historically have housing barriers and needs, such as older adults (age 62+) and persons with disabilities.	6 points
	Program documents are accessible to persons with Limited English Proficiency	4 points
Housing Access Criteria (Maximum 6 points)	Publishes clear and transparent application criteria; describes how applications will be prioritized	2 points
	Does not discriminate on lawful income sources, including public assistance	2 points
	Considers criminal, credit, and eviction history rather than automatically denying application	2 points
Anti-Displacement Policies & Education, Counseling & Resource Access (Maximum 11 Points)	All costs & fees associated with participating in the program are provided to the applicant & are affordable	2 points
	Educates applicants/program participants on requirements and expectations	2 points
	Provides annual home maintenance reminders during lien term	2 points
	Has policies to prioritize homes most at risk of deterioration and in need of rehab.	3 points
	Shares information on other programs, such as tax assistance programs, utility & mortgage assistance	2 points

PROJECT APPROACH		25 POINTS
Location & Access (Maximum 5 Points)	Targets at least 10% of homes in high pressure areas (green areas on map in Grant Policy) OR	1 point
	Targets 11-20% of homes in high pressure areas OR	3 points
	Targets 21-50% of homes in high pressure areas	5 points
Design Quality (Maximum 14)	Has a plan for incorporating criteria on the Universal Design Checklist when applicable	3 points

Points)	Has detailed plan on mitigating any hazardous issues, such as lead-based paint or asbestos if encountered	4 points
	Proposes to address codes issues in the home that threaten the life and safety of occupants so as to protect occupants from fire and other hazards (not just limited to codes issues identified in the scope of work)	3 points
	Actively engages homeowners in the creation of the scope of work and throughout the process	4 points
Sustainability & Resiliency (Maximum 6 Points)	Incorporates green building practices and sustainable and resilient measures into scope of work	4 points
	Educates residents on energy efficiency & sustainability practices	2 points

UNDERWRITING CRITERIA		40 POINTS	
Developer Qualifications (Maximum 10 Points)	Applicant/team has some experience with projects (1-3) of similar size and scope OR Applicant/team has extensive experience with projects (4-5) of similar size and scope OR Applicant/team has extensive experience with projects (6+) of similar size and scope	1 point 3 points 5 points	
	Team/partners have worked together on at least 1 project OR Team/partners have worked together on at least 3 projects	2 points 3 points	
	EITHER Applicant is not partnering with a for-profit OR Applicant is entering into a joint venture or other ownership structure with a for-profit and partnership agreement clearly shows nonprofit role in ownership, decision making & long-term stewardship	2 points (if either criterion is satisfied)	
	Project Readiness (Maximum 10 Points)	Demonstrated understanding of building codes and permitting process	1 point
		Can complete project in 3 years OR Can complete project in 2 years OR Can complete project in 1 year	1 point 2 points 3 points

	Solid commitments for at least 20% of remaining balance & realistic plan for remaining funding OR Solid commitments for 21-30% of remaining balance & realistic plan for remaining funding OR Solid commitments for 31-50% of remaining balance & realistic plan for remaining funding	2 points 4 points 6 points
FINANCIAL CAPACITY (Maximum 10 points)	Recent financial audit has no outstanding findings	2 points
	Cash flow supports operating expenses	2 points
	Operating reserve is \geq 3 months of operating expenses	1 point
	Nonprofit has \geq 3 open contracts OR Nonprofit has 2 open contracts OR Nonprofit has \leq 1 open contract	0 points 1 point 2 points
	All open contracts are progressing (at least 1 milestone met and draw request submitted) except Round 15 contract or has no open contracts	3 points
Funding Need (Maximum 10 points)	Administrative fee 16-20% of grant budget OR Administrative fee 11-15% of grant budget OR Administrative fee \leq 10% of grant budget	1 point 2 points 4 points
	Funding request is less than 50% of total project budget OR Funding request is less than 30% of total project budget OR Funding request is less than 20% of total project budget	2 points 4 points 6 points
	TOTAL POINTS AVAILABLE	100