

**BARNES HOUSING TRUST FUND**  
**ROUND 16 REQUEST FOR FUNDING APPLICATIONS**  
**SCORING MATRIX**  
**RENTAL & HOUSING CO-OPERATIVE PROJECTS**

| <b>THRESHOLD CRITERIA</b>       |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |        |
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| <b>Application Deadline</b>     | The application was submitted by the deadline.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | YES/NO |
| <b>Nonprofit Documentation</b>  | <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 <b>(new requirement)</b></p> <p>Nonprofit Grants Manual Acknowledgement Form signed by the Board Chair <b>(new requirement)</b></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 |
| <b>Applicant Certifications</b> | <p>There are no outstanding legal judgements or adverse findings resulting from Fair Housing, wage payment, or OSHA violations against the Applicant.</p> <p>There are no outstanding legal judgements or adverse findings resulting from Fair Housing, wage payment, or OSHA violations against any member of the Development/Project Team.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            | YES/NO |
| <b>Developer Fee</b>            | The Developer Fee does not exceed 20% of the funding request.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               | YES/NO |

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| <b>Site Control</b>                              | <p>The applicant has demonstrated site control in one of the following ways:</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Deed</li> <li><input type="checkbox"/> Minimum 30-year ground lease (or for the term of the affordability period if longer than 30-years is proposed)</li> <li><input type="checkbox"/> Option Agreement/Signed Sales Contract</li> </ul> | YES/NO           |
| <b>HOUSING SECURITY</b>                          |                                                                                                                                                                                                                                                                                                                                                                                            | <b>66 POINTS</b> |
| <b>Income Targets</b><br>(Maximum 8 points)      | At least 5% of Barnes Fund homes affordable to $\leq 30\%$ AMI                                                                                                                                                                                                                                                                                                                             | 2 points         |
|                                                  | OR<br>6-10% of Barnes Fund homes affordable to $\leq 30\%$ AMI                                                                                                                                                                                                                                                                                                                             | 4 points         |
|                                                  | OR<br>11-15% of Barnes Fund homes affordable to $\leq 30\%$ AMI                                                                                                                                                                                                                                                                                                                            | 6 points         |
|                                                  | OR<br>16-20% of Barnes Fund homes affordable to $\leq 30\%$ AMI                                                                                                                                                                                                                                                                                                                            | 8 points         |
| <b>Affordability Term</b><br>(Maximum 12 points) | 31 to 40 Years                                                                                                                                                                                                                                                                                                                                                                             | 2 points         |
|                                                  | OR<br>41 to 50 Years                                                                                                                                                                                                                                                                                                                                                                       | 4 points         |
|                                                  | OR<br>51 to 60 Years                                                                                                                                                                                                                                                                                                                                                                       | 6 points         |
|                                                  | OR<br>61 to 70 Years                                                                                                                                                                                                                                                                                                                                                                       | 8 points         |
|                                                  | OR<br>71-80 Years                                                                                                                                                                                                                                                                                                                                                                          | 10 points        |
|                                                  | OR<br>81-99+ Years                                                                                                                                                                                                                                                                                                                                                                         | 12 points        |
| <b>Housing Size</b><br>(Maximum 8 points)        | At least 5% of Barnes Fund homes have 3 or more bedrooms                                                                                                                                                                                                                                                                                                                                   | 2 points         |
|                                                  | OR<br>6-10% of Barnes Fund homes have 3 or more bedrooms                                                                                                                                                                                                                                                                                                                                   | 4 points         |
|                                                  | OR<br>11-15% of Barnes Fund homes have 3 or more bedrooms                                                                                                                                                                                                                                                                                                                                  | 6 points         |
|                                                  | OR<br>16-20% of Barnes Fund homes have 3 or more bedrooms                                                                                                                                                                                                                                                                                                                                  | 8 points         |
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| <b>Fair Housing &amp; Affirmative Marketing</b><br>(Maximum 10 points)                                     | Applicant & property management company attend annual Fair Housing Training                                                                                                                                                                                             | 2 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. | 4 points         |
|                                                                                                            | Program documents are accessible to persons with Limited English Proficiency                                                                                                                                                                                            | 4 points         |
| <b>Housing Access Criteria</b><br>(Maximum 10 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                                                                                                                                                                                             | 4 points         |
|                                                                                                            | Has a policy for considering criminal, credit, and eviction history rather than automatically denying application                                                                                                                                                       | 4 points         |
| <b>Anti-Displacement Policies &amp; Education, Counseling &amp; Resource Access</b><br>(Maximum 18 Points) | All costs & fees associated with participating in the program are disclosed to the applicant & are affordable                                                                                                                                                           | 2 points         |
|                                                                                                            | Provides tenants 60-day notice of rent increase                                                                                                                                                                                                                         | 2 points         |
|                                                                                                            | Limits evictions to enumerated reasons (Just Cause)                                                                                                                                                                                                                     | 4 points         |
|                                                                                                            | Allows tenants a longer grace period than required to pay overdue rent & fees to avoid eviction                                                                                                                                                                         | 6 points         |
|                                                                                                            | Provides tenants with information on rent & utility assistance programs                                                                                                                                                                                                 | 2 points         |
|                                                                                                            | Provides at-risk tenants with information on eviction prevention programs prior to initiating an eviction based on nonpayment                                                                                                                                           | 2 points         |
| <b>PROJECT APPROACH</b>                                                                                    |                                                                                                                                                                                                                                                                         | <b>37 POINTS</b> |
| <b>Location &amp; Access</b><br>(Maximum 16 Points)                                                        | Project is within 1 mile of an existing transit stop or a Choose How You Move (CHYM) <a href="#">all-access corridor</a>                                                                                                                                                | 2 points         |
|                                                                                                            | OR<br>Project is within 1/2 mile of an existing transit stop or a CHYM <a href="#">all-access corridor</a>                                                                                                                                                              | 4 points         |
|                                                                                                            | OR<br>Project is within 1/4 mile of an existing transit stop or a (CHYM) <a href="#">all-access corridor</a>                                                                                                                                                            | 6 points         |
|                                                                                                            | Walk Score ≥ 50                                                                                                                                                                                                                                                         | 2 points         |
|                                                                                                            | Sidewalk connection from project to nearest transit stop                                                                                                                                                                                                                | 4 points         |
|                                                                                                            | Project is in UZO or Difficult Development Area                                                                                                                                                                                                                         | 4 points         |

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| <b>Neighborhood and Community Benefits</b><br>(Maximum 8 Points) | Provides passive open space                                                                                                                                                                                                                                                   | 1 point                                        |
|                                                                  | Provides recreational space accessible to residents                                                                                                                                                                                                                           | 2 points                                       |
|                                                                  | Creates publicly accessible or multifunctional space, such as greenway connection or community gathering space                                                                                                                                                                | 4 points                                       |
|                                                                  | Provides commercial space                                                                                                                                                                                                                                                     | 1 point                                        |
| <b>Design Quality</b><br>(Maximum 8 Points)                      | Considers character & context of neighborhood                                                                                                                                                                                                                                 | 2 points                                       |
|                                                                  | Incorporates at least 15 criteria on the Universal Design Checklist<br>OR<br>Incorporates at least 20 criteria on the Universal Design Checklist                                                                                                                              | 1 point<br><br>2 points                        |
|                                                                  | Broadband/other high-speed internet available at the site                                                                                                                                                                                                                     | 2 points                                       |
|                                                                  | Onsite amenities such as gathering spaces, computer rooms, fitness facilities                                                                                                                                                                                                 | 2 points                                       |
|                                                                  |                                                                                                                                                                                                                                                                               |                                                |
| <b>Sustainability &amp; Resiliency</b><br>(Maximum 5 Points)     | Incorporates at least 14 elements on Energy Efficiency & Sustainability Checklist<br>OR<br>Incorporates all elements on Energy Efficiency & Sustainability Checklist                                                                                                          | 1 point<br><br>3 points                        |
|                                                                  | Educates residents on energy efficiency & sustainability practices                                                                                                                                                                                                            | 2 points                                       |
|                                                                  |                                                                                                                                                                                                                                                                               |                                                |
| <b>UNDERWRITING CRITERIA</b>                                     |                                                                                                                                                                                                                                                                               | <b>66 POINTS</b>                               |
| <b>Developer Qualifications</b><br>(Maximum 10 Points)           | Applicant/team has some experience with projects (1-3) of similar size and scope<br>OR<br>Applicant/team has extensive experience with projects (4-5) of similar size and scope<br>OR<br>Applicant/team has extensive experience with projects (6+) of similar size and scope | 1 point<br><br>3 points<br><br>5 points        |
|                                                                  | Team/partners have worked together on at least 1 project<br>OR<br>Team/partners have worked together on at least 3 projects                                                                                                                                                   | 2 points<br><br>3 points                       |
|                                                                  | EITHER<br>Applicant is not partnering with a for-profit<br>OR<br>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<br>(if either criterion is satisfied) |
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| <b>Project Readiness</b><br>(Maximum 25 Points) | Site control demonstrated by sales contract or option agreement<br>OR<br>Site control demonstrated by deed or ground lease for term of proposed affordability period                                                                                                                               | 1 point<br><br>3 points                  |
|                                                 | Concept Plans submitted<br>OR<br>Site Plan & Architectural Drawings submitted<br>OR<br>Construction drawings & materials submitted                                                                                                                                                                 | 1 point<br><br>2 points<br><br>3 points  |
|                                                 | Property needs rezoning & process has not started<br>OR<br>Property needs rezoning and process is underway<br>OR<br>Property does not need rezoning                                                                                                                                                | 0 points<br><br>2 points<br><br>4 points |
|                                                 | Extensive infrastructure improvements required (including off-site)<br>OR<br>No off-site infrastructure required and minimal on-site infrastructure improvements required<br>OR<br>Infrastructure is sufficient (utilities are available)                                                          | 0 points<br><br>2 points<br><br>4 points |
|                                                 | Applicant has conducted extensive due diligence and has reasonably identified site constraints and environmental hazards and has incorporated costs and time to mitigate/address these constraints in its budget and development timeline                                                          | 4 points                                 |
|                                                 | Demonstrated understanding of building codes & permitting processes                                                                                                                                                                                                                                | 1 point                                  |
|                                                 | Solid commitments for at least 20% of remaining balance & realistic plan for remaining funding<br>OR<br>Solid commitments for 21-30% of remaining balance & realistic plan for remaining funding<br>OR<br>Solid commitments for 31-50% of remaining balance & realistic plan for remaining funding | 2 points<br><br>4 points<br><br>6 points |
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| <b>FINANCIAL CAPACITY</b><br>(Maximum 9 points)   | Recent financial audit has no outstanding findings                                                                                                                                                                                                                                                                                                                                                 | 2 points                                 |
|                                                   | Cash flow supports nonprofit's operating expenses                                                                                                                                                                                                                                                                                                                                                  | 1 point                                  |
|                                                   | Nonprofit operating reserve is $\geq 3$ months of operating expenses                                                                                                                                                                                                                                                                                                                               | 1 point                                  |
|                                                   | Nonprofit has $\geq 3$ open Barnes Fund contracts<br>OR<br>Nonprofit has 2 open Barnes Fund contracts<br>OR<br>Nonprofit has $\leq 1$ open Barnes Fund contract                                                                                                                                                                                                                                    | 0 points<br><br>1 point<br><br>2 points  |
|                                                   | All open contracts are progressing (at least 1 milestone met and draw request submitted) except Round 15 contract<br>Or<br>Has no open contracts                                                                                                                                                                                                                                                   | 3 points                                 |
| <b>Funding Need</b><br>(Maximum 22 points)        | Developer fee 16-20% of grant budget<br>OR<br>Developer fee 11-15% of grant budget<br>OR<br>Developer fee $\leq 10\%$ of grant budget                                                                                                                                                                                                                                                              | 1 point<br><br>2 points<br><br>4 points  |
|                                                   | Costs are reasonable and necessary to achieve the project scope based on current industry standards                                                                                                                                                                                                                                                                                                | 6 points                                 |
|                                                   | Funding request is less than 50% of total project budget (or 60% if 20% Barnes Fund units are $\leq 30$ AMI or PSH)<br>OR<br>Funding request is less than 30% of total project budget (or 40% if 20% Barnes Fund units are $\leq 30$ AMI or PSH)<br>OR<br>Funding request is less than 20% of total project budget (or 30% if 20% Barnes Fund units are $\leq 30$ AMI or PSH)                      | 2 points<br><br>4 points<br><br>6 points |
|                                                   | Per unit subsidy is less than 50% of per unit cost/bedroom size (or 60% if 20% Barnes Fund units are $\leq 30$ AMI or PSH)<br>OR<br>Per unit subsidy is less than 30% of per unit cost/bedroom size (or 40% if 20% Barnes Fund units are $\leq 30$ AMI or PSH)<br>OR<br>Per unit subsidy is less than 20% of per unit cost/bedroom size (or 30% if 20% Barnes Fund units are $\leq 30$ AMI or PSH) | 2 points<br><br>4 points<br><br>6 points |
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| <b>TOTAL POINTS AVAILABLE BEFORE BONUS POINTS</b> |                                                                                                                                                                                                                                                                                                                                                                                                    | <b>169</b>                               |

| <b>BONUS POINTS</b>                             |                                                                                                                                        | <b>8 POINTS</b> |
|-------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------|-----------------|
| <b>Permanent Supportive Housing</b>             | At least 5% of Barnes Fund homes designated PSH and applicant satisfies conditions enumerated in Section 6.4 of the Grant Policy<br>OR | 2 points        |
|                                                 | 6-10% of Barnes Fund homes designated PSH and applicant satisfies conditions enumerated in Section 6.4 of the Grant Policy<br>OR       | 4 points        |
|                                                 | 11-15% of Barnes Fund homes designated PSH and applicant satisfies conditions enumerated in Section 6.4 of the Grant Policy<br>OR      | 6 points        |
|                                                 | 16-20% of Barnes Fund homes designated PSH and applicant satisfies conditions enumerated in Section 6.4 of the Grant Policy            | 8 points        |
| <b>TOTAL POINTS AVAILABLE WITH BONUS POINTS</b> |                                                                                                                                        | <b>177</b>      |