

**CITY OF MOUNTAIN VIEW
FEBRUARY 5, 2014 NOFA APPLICATION**

PROJECT APPLICANT

1. Project Applicant:

Applicant Name (Organization/ Agency):

Principal (with Power of Attorney):

Primary Contact Person:

Address:

Phone No.:

Fax No.:

E-Mail:

Federal Tax ID No.:

What is the role of the Applicant in the project? *(check all that apply)*

- Ownership Entity
- Managing Partner or Managing Member
- Sponsoring Organization
- Developer
- Other (describe): Property Manager

2. Legal Status of Applicant:

- General Partnership Limited Partnership Corporation
- Joint Venture¹ Nonprofit Organization
- Other (specify):

3. Status of Organization:

- Currently Exists
- To be formed, estimated date:

¹ If the Applicant is a Joint Venture, a Joint Venture Agreement is required, clearly describing the roles and responsibilities of each partner, who is the lead partner or if the responsibilities are approximately equally split between the partners.

4. **Name(s) of individual(s) who will be General Partner(s) or Principal Owner(s):**

PROJECT DESCRIPTION

5. **Project Name:**

Project Address:

Assessor's Parcel No.:

Census Tract:

6. **Project Type (check all that apply):**

Rental

Family

Senior

Ownership

Special Needs

Other (describe):

SRO/Studio Apartments

7. **Project Activity (check all that apply):**

Acquisition

Rehabilitation

Redevelopment

New Construction

Expiring Tax Credit Property

Mixed Income

Mixed Use

Other (please specify):

8. **Project Description:**

No. Units:

Commercial/Office Uses (specify):

No. Res. Bldgs.:

Commercial Floor Area:

No. Stories:

Office Floor Area:

Land Area:

Elevators:

Residential Floor Area:

Other Uses (specify):

Community Room(s)

Floor Areas:

9. **Parking:**

Total Parking Spaces:

Parking Type:

Residential Spaces and Ratio:

Guest Spaces:

Commercial Spaces and Ratio:

Office Spaces and Ratio:

10. **Number of Housing Units by Income Category:**

| Category | Number of Units | Percentage of Units |
|--------------------------------------|-----------------|---------------------|
| 0% to 30% AMI (Extremely Low-Income) | | |
| 31% to 50% AMI (Very Low-Income) | | |
| 51% to 80% AMI (Low-Income) | | |
| Unrestricted | | |

11. **Unit Amenities (air conditioning, laundry in unit, balconies, etc.):**

12. **Number of Unit Types:**

Studio _____

1 Bedroom _____

2 Bedroom _____

3 Bedroom _____

PROJECT NARRATIVE

13. **Project Description:**

Provide a brief narrative summary of the proposed project. Please include location, project type (new versus rehab), target population and any unique project characteristics.

14. **Project Design:**

Provide a description of the project's architectural and site plan concepts and how these concepts address the opportunities and limitations of the site and location.

15. **Green Building Features:**

Describe the green building features that will be incorporated into the project.

16. **On-Site Amenities:**

Describe any on-site amenities, including any project characteristics that address the special needs of the population you intend to serve.

17. **Neighborhood/Off-Site Amenities:**

Describe the property location, neighborhood, transportation options, local services and amenities within 1/4-mile and 1/2-mile of the site.

18. **Potential Development Obstacles:**

Are there any known issues or circumstances that may delay or create challenges for the project? If yes, list issues below, including an outline of steps that will be taken and the time frame needed to resolve these issues.

SITE INFORMATION

19. **Site Control:**

a. Site control at the time of application is required. What is the level of site control currently held by the applicant?

b. Will site acquisition be a purchase or long-term lease?

- d. Provide the following information for each on-site building to be retained as part of this project:

Square Footage:

Date Built:

No. of Stories:

- e. Provide a brief description of the condition of any buildings to be rehabilitated.

- f. Describe unique site features (Heritage trees, parcel shape, etc.).

- g. Identify problem site conditions (high noise levels, ingress/ egress issues, etc.).

- h. Is the site in a floodplain? Yes No Map used:

If yes, type of floodplain (number of years):

- i. Describe adjoining land uses:

West:

East:

North:

South:

22. Households and Businesses on Site

- a. If residential exists on the proposed site, how many households currently reside on the property?

- b. How many of the residential units are vacant?

- c. Have the tenants signed a lease or a month-to-month rental agreement?

- d. If businesses are located on the site, provide the name, type of business and the associated square footage for each business.

23. **Community Priorities:**

- a. Explain how this project meets the objectives of the housing goals and priorities identified in this NOFA and the goals and objectives of the City's Housing Element and General Plan.

PROJECT FUNDING

24. **Project Budget:**

- a. City Funds Requested: \$ Funds Per Assisted Unit: \$

- b. Total Project Cost: \$ Cost Per Assisted Unit: \$

c. Other Sources of Permanent Financing (not including private bank loans):

| Type of Funding | Amount |
|---|---------------|
| <input type="checkbox"/> 9% Low-Income Housing Tax Credits | |
| <input type="checkbox"/> 4% Low-Income Housing Tax Credits | |
| <input type="checkbox"/> CalHFA/Conventional Lender | |
| <input type="checkbox"/> Tax-Exempt Multi-Family Bonds | |
| <input type="checkbox"/> Multi-Family Housing Program (MHP) | |
| <input type="checkbox"/> Affordable Housing Program (AHP) | |
| <input type="checkbox"/> County of Santa Clara, Office of Affordable Housing | |
| <input type="checkbox"/> Housing Trust Silicon Valley | |
| <input type="checkbox"/> Stanford Housing Funds (administered by County of Santa Clara) | |
| <input type="checkbox"/> Other: | |

d. How will the requested City funding be used?

e. Amount of developer fee and percentage of project cost:

f. Assess the chances of the project securing required funding and steps that will be taken to make the project competitive. What is the self-scored nine percent (9%) tax credit tie breaker score for the project (if applicable)?

DEVELOPER EXPERIENCE

Developers must have successfully completed a minimum of three affordable housing projects of similar size and complexity as the proposed project to qualify for this NOFA.

25. Provide a summary of affordable housing experience:

Years Experience:

Number of Projects:

Number of Projects in Santa Clara County:

Average Size of Projects:

Number of Units Placed in Service:

26. Describe awards given to projects completed in the last 10 years.

27. Describe three projects completed in the last ten years that are similar to the proposed project and provide photographs of each project:

a. Project 1

Name of Project:

Location:

Number of Units:

Type of Development (senior, family, etc.):

Name of Project Manager:

Number of Stories:

Unit Types (studio, 1-bedroom, etc.):

Type of Construction:

Project Amenities:

Entitlement Date:

Occupancy Date:

Funding Sources:

b. Project 2

Name of Project:

Location:

Number of Units:

Type of Development (senior, family, etc.):

Name of Project Manager:

Number of Stories:

Unit Types (studio, 1-bedroom, etc.):

Type of Construction:

Project Amenities:

Entitlement Date:

Occupancy Date:

Funding Sources:

c. Project 3

Name of Project:

Location:

Number of Units:

Type of Development (senior, family, etc.):

Name of Project Manager:

Number of Stories:

Unit Types (studio, 1-bedroom, etc.):

Type of Construction:

Project Amenities:

Entitlement Date:

Occupancy Date:

Funding Sources:

28. **Personnel:**

List the names of key members of the applicant's development team, their titles, responsibilities and their years of experience in affordable housing:

| Project Staff | Name | Role in Proposed Project | Years of Hsg Dev Experience | Years with this Developer |
|--|-------------|---------------------------------|------------------------------------|----------------------------------|
| Project Manager | | | | |
| Director of Real Estate Development | | | | |
| Executive Director | | | | |
| Chief Financial Officer | | | | |
| Other | | | | |
| Other | | | | |
| Other | | | | |

29. **Other Team Members:**

Indicate which of the following development team members have been selected and identify them:

Developer, if Different from Applicant

Architect(s)/Engineer(s)

Attorney(s) and/or Tax Professionals

Property Management Agent

Financial and Other Consultant(s)

General Contractor

Investor

30. **List all other participants and affiliates (people, businesses and organizations) proposing to participate in the project:**

Name

Address

31. **Property Management:**

Describe how the property will be managed, including the number of staff, locations and management office hours.

32. **If the project will be managed by an agency other than the project applicant, describe the project applicant's role in the ongoing management of the project and resolution of management issues.**

33. List the names of key property management staff, their titles, responsibilities and their years of experience in affordable housing:

| Name | Title (<i>e.g., project manager, intake staff</i>) | Job Responsibilities | Years Experience in Affordable Housing |
|------|--|----------------------|--|
| | | | |
| | | | |
| | | | |

34. Explain your marketing strategy and the tenant selection process (including how local preferences will be handled) and the establishment and management of waiting lists.

Applicant Certification

I certify that the information submitted in this application and all supporting materials is true, accurate and complete to the best of my knowledge. I acknowledge that if facts and/or information herein are found to be misrepresented, it shall constitute grounds for disqualification of my proposal.

I further certify that all of the following statements are true, except if I have indicated otherwise on this certification:

- a. I have not sold any of the projects listed on the "10-Year Projects" list;
- b. No mortgage on a project listed by me has ever been in default, assigned to the government or foreclosed, nor has mortgage relief by the mortgagee been given;
- c. I have not experienced defaults or noncompliance under any contract or regulatory agreement nor issued IRS Form 8823 on any Low-Income Housing Tax Credit (LIHTC) project on the "10-Year Projects" list;
- d. To the best of my knowledge, there are no unresolved findings raised as a result of Agencies' audits, management reviews or other investigations concerning me or my projects for the past ten years;
- e. I have not been suspended, debarred or otherwise restricted by any state agency from participating in the LIHTC program or other affordable housing programs; and
- f. I have not failed to use state funds or LIHTC allocated to me in any state.

Statements above (if any) to which I cannot certify have been deleted by striking through the words with a pen. I have initialed each deletion (if any) and have attached a true and accurate signed statement (if applicable) to explain the facts and circumstances which I think helps to qualify me as a responsible principal for participation in this NOFA.

Applicant Name(s)

6.1.2021

Signature/Date

Print Name and Title

This application and all supporting material are regarded as public records under the California Public Records Act.

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Question 23. Community Priorities: Explain how this project meets the objectives of the housing goals and priorities identified in the NOFAA and the goals and objectives of the City's Housing Element and General Plan.

The Montecito development clearly achieves the priorities/goals outlined in the City's NOFA, General Plan and Housing Element. Some of the priorities/goals being met in each of these City documents are outlined below

NOFA

1) Goal: Housing Targeted to households earning less than 80% AMI, with preference to projects serving very low – (LI) and extremely low- income households (ELI).

Objective met: 100% of the units will be for household at less than 60% AMI, with 33.33% of the units serving 30% AMI, 17.86% at 40% AMI, 17.86% at 50% AMI and 30.95% at 60% AMI.

2) Goal: Housing providing the dual benefit of developing affordable housing and creating a substantial improvement of a blighted property and/or neighborhood.

Objective met: The site when purchased was occupied by an underutilized commercial building. The site is currently vacant.

HOUSING ELEMENT- Goal 1: Support the production of new housing units serving a broad range of household types and incomes.

1) Policy 1.2: Encourage a mix of housing types, at a range of densities, that serves a diverse population, including units serving both young and mature families, singles, young professionals, single-parent households, seniors, and both first-time and move-up buyers.

Objective met: This development will include housing units that range in size from studios to 3 Bedroom apartments. This range of sizes will meet the needs of singles, seniors, single-parent households and larger families.

2) Policy 1.4: Provide higher density housing near transit, in the Downtown, near employment centers, and within walking distance of services.

Objective met: The Montecito development will be located directly across the street from a neighborhood commercial center. The development will be served by frequent bus service on both Montecito Ave. and Shoreline Boulevard and is less than ½ mile from the CalTrain station and downtown Mountain View.

3) Policy 1.5: Support the development of both rental and ownership housing serving a broad range of incomes, particularly extremely low-, very low- and low- income households.

Objective met: This 100% rental affordable development will have affordable rents that will serve families and individuals with incomes at 30% (ELI), 40% (VLI), 50%(VLI) and 60% (VLI) AMI.

GENERAL PLAN – Mountain View’s Land Use Principles

1) Principle #2 Sustainable Land Use and Transportation- Focused and intensified growth and change next to public transportation corridors helps increase ridership, reduce vehicle miles traveled and greenhouse gas emissions and optimizes opportunities for highly sustainable development.

Objective met: The Montecito development will convert an underutilized commercial development to a residential development of approx. 80du/acre. The property is located at the intersection and Montecito Ave. and Shoreline Blvd., both important arterial streets that provide connections not only through the city but the region. Frequent bus service on both Montecito and Shoreline Boulevards will be easily accessible by the residents. Additionally, the site is less than ½ mile from the CalTrain station which provides rail connection up and down the peninsula.

Question 34. Explain your marketing strategy and the tenant selection process (including how local preferences will be handles and the establishment and management of waiting lists.

The marketing strategy and tenant selection process for the Montecito development will be based upon Charities' standard marketing practices summarized below and then tailored to the unique characteristics of this development and funding sources.

Policy on Nondiscrimination and Accessibility

With respect to the treatment of applicants, the Owner and Agent will not discriminate against any individual or family because of race, color, creed, national or ethnic origin or ancestry, religion, sex, sexual preference, gender identity, age, disability, military status, source of income, marital status or familial status, acquired immune deficiency syndrome (AIDS) or AIDS-related conditions (ARC), or any other arbitrary basis. No criteria will be applied, or information considered pertaining to attributes of behavior that may be imputed by some to a particular group or category. All criteria shall be applied equitably, and all information considered on an applicant shall be related solely to the attributes and behavior of individual members of the household as they may affect residency.

Section 504 and Reasonable Accommodations

The Property will seek to identify and eliminate situations or procedures which create a barrier to equal housing opportunity for all. In accordance with Section 504 of The Rehabilitation Act of 1973, the Property will make reasonable accommodation for individuals with disabilities (applicants or residents). Such accommodations may include changes in the method of administering policies, procedures, or services. The Section 504 coordinator in this region is Lisa Caldwell.

Marketing Plan

The Owner and Agent shall adopt affirmative marketing procedures and requirements as stipulated by the City of Mountain View, property's regulatory agreements, Limited Partnership Agreement and in conformity with Fair Housing law.

Unless significant demographic changes occur in the market area, the Owner and Agent will review the Affirmative Marketing Plan every five years and update as needed to ensure compliance. The advertising sources will be included in the review to determine if past sources should be changed or expanded.

Waitlist and Ongoing Marketing

Once initial rent up is complete, lottery list applicants will remain on a waitlist. A waitlist will be maintained of all eligible persons who met the lottery criteria. Applicants for each Area Median Income the property serves, and by unit type in order of lottery list placement, will make up the waiting list.

The waitlist will open again when 25 or fewer applicants are on each list. The list will be purged annually. Any opening of the waitlist must follow the Affirmative Fair Housing Marketing Plan and Local Preference System if applicable. Procedures for alerting waitlist applicants of vacancies are set out in the Tenant Selection Criteria.

City of Mountain View Local Preferences

It is understood that the Montecito Development will serve extremely low, very low- income, and low-income households. Additionally, under the current County of Santa Clara, Measure A funding guidelines, developments must set-aside units to serve one of two special needs categories; #1) 1/3 of units as Permanent Supportive Housing or Rapid Rehousing (PSH/RRH) and another 1/3 of units at 30% AMI (if these units have project based vouchers, they can be at 50% AMI); or #2) 50% of the units as Rapid Rehousing (RRH) units at 30% AMI. The residents of the PSH/RRH units are referred by the County of Santa Clara, in accordance the County's guidelines for marketing, outreach and placement. Charities has elected to serve the RRH population. The residents of the units with VASH section 8 vouchers will be referred through the VA Palo Alto Health Care System.

It is our understanding that the City of Mountain View would like to see as many local residents served by this development as possible. Management will conduct a marketing /outreach campaign for units which will be targeted to the Mountain View community and will include collaboration with local community-based agencies, city departments, and local media advertisement.

If the City of Mountain View institutes a priority point placement system that reflects the City 's priorities regarding placement of households into this affordable development, Management will fold that system into the selection/lottery process.

MONTECITO FAMILY APARTMENTS

RESIDENT SERVICES PLAN

Catholic Charities of Santa Clara County (“Catholic Charities”) provides on-site services at all of Charities’ developments and will again provide resident services for the Montecito Family Apartments. Services are provided free of charge to the residents, and paid for out of the operating budget

Catholic Charities is a multi-service organization serving low income residents of Santa Clara County for over 60 years. Catholic Charities helps people of all cultures and beliefs rise-up out of poverty and overcome the barriers to self-sufficiency. Because most lives are a complex pattern of choices and circumstances, Catholic Charities takes a holistic approach to helping people change their lives, taking into account the whole person as well as their family and life situations. To do this Catholic Charities offers a broad range of services, including job skills training and placement, older adult services, mental health and substance abuse counseling, housing assistance, financial education, immigration support, and refugee resettlement. They also provide educational programs that help young people develop into self-sufficient adults. Catholic Charities has a long-standing history of providing such services to residents at Charities Housing developments.

Catholic Charities staff will be onsite minimally 40 hours a week to deliver appropriate services to the residents.

Service Coordination: Service Coordination are the typical services provided to residents. Service Coordination involves providing appropriate linkages and referrals to existing services in the community to the residents. This could include but is not limited to information on school registration, assistance with utility payments and free tax preparation programs. Service coordination activities could also include;

- coordinate educational or social programs of interest
- conflict resolution
- social/holiday events
- coordination of a Resident Council
- food delivery and distribution
- children’s programs

Case Management: Case Management services involve more intensive and individualized services for residents. Case Management services are typically provided in communities that serve formerly homeless populations such as Permanent Supportive Housing (PSH) residents, Rapid Rehousing (RRH) residents, or folks with other special needs. Charities is intending to serve residents in the RRH program and VA Palo Alto VASH program. These families and individuals need more than Service Coordination to be successful. The County of Santa Clara will provide services directly or will pay for a community-based service provider to assist residents in the RRH program. VA Palo Alto Health Care will provide services directly or will pay for a community-based service provider to assist residents in the VASH program.