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**Jacksonville Housing and Community Development Commission**  
**Board of Directors Meeting**  
**July 23, 2014**  
**4:00 p.m.**  
**AGENDA**

Call Meeting to Order  
Approval of Minutes for June 18, 2014

Philip Mobley  
JHCDC Board

**I. Public Comments**

**II. Staff Reports**

- A. General Comments
- B. Environmental Review Report Update
- C. Choice Neighborhoods and Promise Zone Grants

Staff  
Elaine Spencer  
Elaine Spencer

**III. Action Items**

- A. SHIP LHAP Revision
- B. Universal Applications

**IV. New Business**

- A.
- B.

**V. Unfinished Business**

- A.
- B.

# 2014-15 UNIVERSAL APPLICATION (HOME, SHIP, CDBG, ESG & HOPWA)

## OVERVIEW

Activity Type	# of Apps	HCDD Requested Amount
CDBG-ED Total	1	\$ 43,225.00
CDBG-Homeowner Rehabilitation (LRP & U-TIP)	1	\$ 910,000.00 (in-house)
CDBG-Housing Rehabilitation	1	\$ 243,596.14
CDBG-PFI Total	11	\$ 4,228,370.39
CDBG-PS Total	26	\$ 1,554,671.85
CDBG-Clearance and Demolition	1	\$ 300,000.00
CDBG-Acquisition	1	\$ 102,500.00
CDBG-Applications not meeting pre-screening threshold	8	\$ 408,709.04
CDBG Total Applications	49	\$
ESG Total	5	\$ 776,871.85
HOME-CHDO Operating Total	3	\$ 135,000.00
HOME-CHDO Pool	0	\$0
HOME-H2H-Downpayment Assistance (in-house)	0	\$ 579,217.20
HOME-Owner-occupied Rehab	0	\$0
HOME-Applications not meeting pre-screening threshold	2	\$ 581,495.00
HOME Total Applications	4	
HOPWA Total	7	\$ 3,062,405.79
SHIP-Homeownership Counseling	3	\$ 265,000.00
SHIP-Foreclosure Prevention	2	\$ 80,100.00
SHIP-Homeowner Rehabilitation	3	\$ 2,355,000.00
SHIP-Disabled Housing Rehabilitation	1	\$ 803,005.00
SHIP-Applications not meeting pre-screening threshold	4	\$ 252,100.00
Total # of Agencies not meeting the pre-screening threshold	14	N/A
Grand Total	78	\$ 15,855,578.43

# BOARD MEETING SUBMISSION FORM

(All information must be completed prior to Submission)

**AGENDA NAME: Universal Application**

(This is the name of the item to place on the Agenda)

**Today's Date: 7/17/2014**

**Please check only one:** ☐ JHFA ☒ JHCDC ☐ NWJEDF

**Please check only one:**

☐ Reports ☐ Staff Reports ☒ ACTION ITEM ☐ New Business ☐ Old Business

**Name of Person/s that will be presenting item at the meeting: LaCree Carswell & Dayatra Coles**

**Background/Description:** Staff is requesting approval on the attached recommendations for the Universal Application Fiscal Year 2014/2015 funding.

**Are funds available for this item (if applicable):** ☒ Yes ☐ No ☐ N/A \_\_\_\_\_  
*Finance Dir. or Senior Acct. Signature*

**RECOMMENDATION:**

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## ATTACHMENTS (Check Here if N/A ☐ )

<p>Name of Attachment1 Universal Application Summaries and Fact Sheets</p> <p>Name of Person/s responsible for submitting attachment L. Carswell</p> <p>Are there signatures required? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p>	<p>Name of Attachment2</p> <p>Name of Person/s responsible for submitting attachment</p> <p>Are there signatures required? <input type="checkbox"/> Yes <input type="checkbox"/> No</p>
<p>Name of Attachment3</p> <p>Name of Person/s responsible for submitting attachment</p> <p>Are there signatures required? <input type="checkbox"/> Yes <input type="checkbox"/> No</p>	<p>Name of Attachment4</p> <p>Name of Person/s responsible for submitting attachment</p> <p>Are there signatures required? <input type="checkbox"/> Yes <input type="checkbox"/> No</p>

Moved: \_\_\_\_\_ Second: \_\_\_\_\_ Other: \_\_\_\_\_ Quorum # \_\_\_\_\_

*Motion Note:*

# 2014-15 UNIVERSAL APPLICATION COMMUNITY DEVELOPMENT BLOCK GRANT (CDBG) PROGRAM OVERVIEW

## \$5,594,293-Entitlement

## \$75,000-Program Income

Eligibility Category	# of Agencies Requesting Funding	Amount Requested	# of Agencies Passed Scoring Min. 70	# of Agencies Awarded Funds	Amount Awarded	Percent of funds awarded
Economic Development	2	\$83,225.00	1	1	\$43,225.00	1%
Clearance and Demolition	1	\$300,000.00	1	1	\$150,000.00	3%
Housing Rehabilitation (LRP & U-TIP)	In-house	\$835,000.00	N/A	N/A	\$835,000.00	15%
Housing Rehabilitation	3	\$1,153,596.00	1	1	\$243,596	4%
Public Facilities & Improvements (PFI)	10	\$4,335,889.92	7	7	\$2,075,211.00	37%
Public Services (PS) - 15% Max	32	\$2,060,318.21	27	22	\$775,394.00-EN \$75,000.00-PI Total- \$850,394.00	14% 1% Total-15%
Rehab Programs Delivery Costs	In-house	\$353,008.00	N/A	N/A	\$353,008.00-6.31%	6%
Administration-20% Max	1	\$1,118,859.00	1-(JHRC) 1-(HCDD)	1	\$20,000.00-.36% \$1,098,859-19.64%	20%
Total CDBG Funds	49	\$6,043,962.76	38	33	\$5,669,293.00-100%	100%

**HOUSING & COMMUNITY DEVELOPMENT DIVISION  
2014 – 2015 UNIVERSAL APPLICATION FUNDING REQUEST**

**FACT SHEET**

**Project Title:** Priority 2: Hillman-Pratt Funeral Home Acquisition

**Activity Type:** Acquisition

**Agency:** Clara White Mission, Inc.

**Contact Person:** JuCoby Pittman-Peele, Chief Executive Officer

**Contact E-Mail:** jpittman@clarawhitemission.org

**Address:** 613 West Ashley Street

**Phone Number:** 904-354-4162 x103

**Fax Number:** 904-791-4360

**Funding Source:** CDBG      **# of People/Units to be served:** 109,512 People

**Project Description:** Funds will be used for the acquisition of the Hillman-Pratt Funeral Home which is expected to be used for supportive services for approximately 109,512 individuals annually.

**Comments:** This agency demonstrated their ability to meet and/or exceed program goals during previous funding cycles. The agency provided detailed information regarding budgeting software and procedures for financial grant management. The statistics are relevant and target population is identified along with service delivery area and urgency.

**BUDGET**

**FUNDING REQUESTED**      **\$102,500.00**

**Match Funds:**      **\$102,500.00**

**In-kind Funds:**      **\$0.00**

**Total Project Costs:**      **\$205,000.00**

**Financial Comments:** Match is not properly documented. No project leverage documented. No documentation for the acquisition price included in financial review package. Cost appears to be the assessed value of the property.

**Programmatic Score:** 55.5      **Financial Score:** 24      **Total Score:** 79.5

**Amount Recommended:** \$102,500.00

<b>Previous Year's Funding:</b>	<b>2011-2012</b>	<b>2012-2013</b>	<b>2013-2014</b>
	N/A	N/A	N/A

**HOUSING & COMMUNITY DEVELOPMENT DIVISION  
2014 – 2015 UNIVERSAL APPLICATION FUNDING REQUEST**

**FACT SHEET**

**Project Title:** Clearance/Demolition

**Activity Type:** Code Enforcement

**Agency:** City of Jacksonville - Regulatory Compliance Department

**Contact Person:** Bryan D. Mosier, Acting Chief

**Contact E-Mail:** bmosier@coj.net

**Address:** 214 N. Hogan Street, Suite 134

**Phone Number:** 904-255-7005

**Fax Number:** 904-588-0516

**Funding Source:** CDBG      **# of People/Units to be served:** 260 Households

**Project Description:** Funds will be used for clearance and demolition, to include 200 board-ups and 60 demolitions/site clearances of unsafe structures in target neighborhoods and other low and moderate income areas.

**Comments:** The agency statement of need very detail and provided 2012 census data and reference the Housing Element Study. Project description clear and specific timelines.

**BUDGET**

**FUNDING REQUESTED**      **\$300,000.00**

**Match Funds:**      **\$300,000.00**

**In-kind Funds:**      **\$0.00**

**Total Project Costs:**      **\$600,000.00**

**Financial Comments:** Agency declares \$300,000 in match funding dedicated to project, but it is undocumented. No declared or documented leverage.

**Programmatic Score:** 40      **Financial Score:** 30      **Total Score:** 70

**Amount Recommended:** \$150,000.00

<b>Previous Year's Funding:</b>	<b>2011-2012</b>	<b>2012-2013</b>	<b>2013-2014</b>
	\$284,456.00	\$270,233.00	\$270,233.00

Revised: July 17, 2014

**HOUSING & COMMUNITY DEVELOPMENT DIVISION  
2014 – 2015 UNIVERSAL APPLICATION FUNDING REQUEST**

**FACT SHEET**

**Project Title:** Small Business Center Micro-Enterprises Certification

**Activity Type:** Economic Development

**Agency:** Jacksonville Chamber Foundation, Inc. (dba JAX Chamber Foundation)

**Contact Person:** Sandra R. Bartow, President

**Contact E-Mail:** sandy.bartow@myjaxchamber.com

**Address:** 3 Independent Drive

**Phone Number:** 904-366-6634

**Fax Number:** 904-366-6604

**Funding Source:** CDBG      **# of People/Units to be served:** 275 People

**Project Description:** Funds will be used for direct personnel services to provide 11 low and moderate income small business owners, developing micro-enterprises with technical assistance.

**Comments:** The agency has a track record for administering grant funds. Statement of need was clear and concise with relevant statistics to Jacksonville. The implementation schedule is realistic and goals are SMART. The agency included four (4) letter of support.

**BUDGET**

<b><u>FUNDING REQUESTED</u></b>	<b>\$43,225.00</b>
<b>Match Funds:</b>	<b>\$444,148.00</b>
<b>In-kind Funds:</b>	<b>\$209,733.00</b>
<b>Total Project Costs:</b>	<b>\$697,148.00</b>

**Financial Comments:** Match documented by partial minutes approving budget. Leverage: SBAHQ-12-W-0014/0004 \$114,267; Worksource \$117,976. Well detailed budget submission.

**Programmatic Score:** 55      **Financial Score:** 38      **Total Score:** 93

**Amount Recommended:** \$43,225.00

<b>Previous Year's Funding:</b>	<b>2011-2012</b>	<b>2012-2013</b>	<b>2013-2014</b>
	\$45,500.00	\$43,225.00	\$43,225.00

**HOUSING & COMMUNITY DEVELOPMENT DIVISION  
2014 – 2015 UNIVERSAL APPLICATION FUNDING REQUEST**

**FACT SHEET**

**Project Title:** Reader Theater Literacy Program

**Activity Type:** Economic Development

**Agency:** Young Minds Building Success Charities, Inc.

**Contact Person:** Tangela Floyd, Executive Director

**Contact E-Mail:** msakatan3@gmail.com

**Address:** 4800 North Main Street

**Phone Number:** 904-635-6167

**Fax Number:** 904-410-0725

**Funding Source:** CDBG      **# of People/Units to be served:** 150 People

**Project Description:** Funds will be used for 50% of salaries, wages & benefits for one (1) Program Director and one (1) Program Assistant and direct client personnel services and operating expenditures to provide tutoring and reading theater to facilitate the improvement of 150 children's proficiency in reading.

**Comments:** Threshold not met. No audit or balance sheet included. Agency indicated non-profit began August 2013.

**BUDGET**

**FUNDING REQUESTED**      **\$40,000.00**

**Match Funds:**      **\$40,000.00**

**In-kind Funds:**      **\$0.00**

**Total Project Costs:**      **\$80,000.00**

**Financial Comments:** Agency did not include audit or current balance sheet.

**Programmatic Score:** 0      **Financial Score:** 0      **Total Score:** 0

**Amount Recommended:** \$0.00

<b>Previous Year's Funding:</b>	<b>2011-2012</b>	<b>2012-2013</b>	<b>2013-2014</b>
	N/A	N/A	N/A



**HOUSING & COMMUNITY DEVELOPMENT DIVISION  
2014 – 2015 UNIVERSAL APPLICATION FUNDING REQUEST**

**FACT SHEET**

**Project Title:** Oaks at Durkeeville Conversion to Veterans Units

**Activity Type:** Housing Rehabilitation

**Agency:** Jacksonville Housing Authority

**Contact Person:** Fred McKinnies, President and CEO

**Contact E-Mail:** fmckinnies@jaxha.org

**Address:** 1300 Broad Street

**Phone Number:** 904-366-3455

**Fax Number:** 904-766-4418

**Funding Source:** CDBG      **# of People/Units to be served:** 8 People

**Project Description:** Funds will be used for demolition costs, interior renovations and fire sprinkler system to provide permanent housing for 8 homeless veterans.

**Comments:** The agency provided a very detail and concise background of administering grant funds and reference their internal financial software system. The implementation schedule is realistic and goals were SMART. The agency included one (1) letter of support.

**BUDGET**

**FUNDING REQUESTED**      **\$243,596.14**

**Match Funds:**      **\$367,965.24**

**In-kind Funds:**      **\$0.00**

**Total Project Costs:**      **\$611,561.38**

**Financial Comments:** Agency declared match of \$367,965, but states in its letter that it does not have sufficient funding to cover the cost. Budget form shows declared match of \$224,500. No credit given. Agency included public service type budgets in addition to their construction budget. The unnecessary forms were not reviewed. Agency did not include any documentation to support amount requested. Due to the lack of documentation and the conflicting match amounts declared, the reviewer had to deem the budget incomplete and was not able to review. Agency had significant deficiencies and reportable conditions related to its payroll procedures and tenant eligibility procedures.

**Programmatic Score:** 53      **Financial Score:** 20      **Total Score:** 73

**Amount Recommended:** \$243,596.00

<b>Previous Year's Funding:</b>	<b>2011-2012</b>	<b>2012-2013</b>	<b>2013-2014</b>
	N/A	N/A	N/A

**HOUSING & COMMUNITY DEVELOPMENT DIVISION  
2014 – 2015 UNIVERSAL APPLICATION FUNDING REQUEST**

**FACT SHEET**

**Project Title:** Francis Avenue Drainage Improvements

**Activity Type:** Public Facility Improvement

**Agency:** City of Atlantic Beach

**Contact Person:** Jeremy Hubsch, Building and Planning Director

**Contact E-Mail:** jhubsch@coab.us

**Address:** 800 Seminole Road

**Phone Number:** 904-234-4285

**Fax Number:** 904-247-5845

**Funding Source:** CDBG      **# of People/Units to be served:** 5,000 People

**Project Description:** Funds will be used for mobilization, permitting, traffic maintenance, clearing & grading, excavation, structures, pipe, concrete, asphalt, lime rock and sand, and restoration and sod to assist 5,000 persons along Francis Street.

**Comments:** The agency clearly addressed the need for the project in the area described. Agency goals are SMART and measurable, however, implementation schedule has project start date of January. This project has not been approved by their City Commission.

**BUDGET**

**FUNDING REQUESTED**      **\$120,000.00**

**Match Funds:**      **\$0.00**

**In-kind Funds:**      **\$0.00**

**Total Project Costs:**      **\$120,000.00**

**Financial Comments:** No declared or documented match. No declared or documented leverage. No documentation regarding the method of valuation for the various line items in proposed project budget. It appears that the contractor has already been selected. Was the contractor competitively bid?

**Programmatic Score:** 44      **Financial Score:** 27      **Total Score:** 71

**Amount Recommended:** \$82,194.00

<b>Previous Year's Funding:</b>	<b>2011-2012</b>	<b>2012-2013</b>	<b>2013-2014</b>
	\$92,690.00	\$79,064.00	\$79,064.00

**HOUSING & COMMUNITY DEVELOPMENT DIVISION  
2014 – 2015 UNIVERSAL APPLICATION FUNDING REQUEST**

**FACT SHEET**

**Project Title:** ADA Project Accessible Curb Ramps

**Activity Type:** Public Facility Improvement

**Agency:** City of Jacksonville - Department of Public Works

**Contact Person:** David M. Schneider,

**Contact E-Mail:** schneidr@coj.net

**Address:** 214 N. Hogan Street, 10th Floor

**Phone Number:** 904-255-8746

**Fax Number:**

**Funding Source:** CDBG      **# of People/Units to be served:** 1,224 People

**Project Description:** Funds will be used to provide curb ramps and other sloped areas at all intersections of streets, roads, and highways in low and moderate income zip codes 32202 and 32204, eliminating barriers to entry and ensuring compliance with 2010 ADA guidelines with an expected impact to 1,224 people.

**Comments:** The agency clearly addressed the need for the project in the are urgency clearly identified.

**BUDGET**

**FUNDING REQUESTED**      **\$1,327,479.00**

**Match Funds:**      **\$0.00**

**In-kind Funds:**      **\$0.00**

**Total Project Costs:**      **\$3,446,150.00**

**Financial Comments:** No declared or documented match. No declared or documented leverage. Budget reflects \$3,446,150 in expenditures and total funding sources, but only \$1,327,479 in funding is listed. Budget is out of balance and mathematically incorrect. Documentation for proposed cost is an internally generated cost estimate document.

**Programmatic Score:** 47      **Financial Score:** 24      **Total Score:** 71

**Amount Recommended:** \$500,000.00

<b>Previous Year's Funding:</b>	<b>2011-2012</b>	<b>2012-2013</b>	<b>2013-2014</b>
	N/A	N/A	N/A

**HOUSING & COMMUNITY DEVELOPMENT DIVISION  
2014 – 2015 UNIVERSAL APPLICATION FUNDING REQUEST**

**FACT SHEET**

**Project Title:** Larsen Street Area Water Main Improvements (West of Victor)

**Activity Type:** Public Facility Improvement

**Agency:** City of Jacksonville - Department of Public Works

**Contact Person:** Dinah L. Coleman-Mason, Admin. Manager

**Contact E-Mail:** dinahm@coj.net

**Address:** 214 N. Hogan Street, 10th Floor

**Phone Number:** 904-255-8728

**Fax Number:** 904-255-8948

**Funding Source:** CDBG      **# of People/Units to be served:** 2,525 People

**Project Description:** Funds will be used for excavation and removal of existing pavement and solid to prep for the installation of 8,615 LF of PVC Water Larsen Street Area Water Main Improvements.

**Comments:** Based on Pine Forest study, agency provide an adequate statement of need and project description. Additional details needed on Builder's Care and JEA role and other sources of funding for clarification to proceed with project. Low and moderate area benefit in census tract 163. The agency did not provide the urgency of the project.

**BUDGET**

**FUNDING REQUESTED**      **\$782,036.89**

**Match Funds:**      **\$0.00**

**In-kind Funds:**      **\$0.00**

**Total Project Costs:**      **\$782,036.89**

**Financial Comments:** No declared or documented match. No declared or documented leverage. Proposed budget amounts supported by external cost proposal. Proposed budget contains minor calculation error due to changed formulas.

**Programmatic Score:** 45      **Financial Score:** 27      **Total Score:** 72

**Amount Recommended:** \$479,929.00

<b>Previous Year's Funding:</b>	<b>2011-2012</b>	<b>2012-2013</b>	<b>2013-2014</b>
	N/A	N/A	N/A

**HOUSING & COMMUNITY DEVELOPMENT DIVISION  
2014 – 2015 UNIVERSAL APPLICATION FUNDING REQUEST**

**FACT SHEET**

**Project Title:** Pine Forest Infrastructure Improvements (Pine Forest Curb and Gutter Phase I)

**Activity Type:** Public Facility Improvement

**Agency:** City of Jacksonville - Department of Public Works

**Contact Person:** Dinah L. Coleman-Mason, Admin. Manager

**Contact E-Mail:** dinahm@coj.net

**Address:** 214 N. Hogan Street, 10th Floor

**Phone Number:** 904-255-8728

**Fax Number:** 904-255-8948

**Funding Source:** CDBG      **# of People/Units to be served:**

**Project Description:** Funds will be used for design of curb and gutter along Grant Road.

**Comments:** The applicant used Pine Forest study of 2012 to address community need. The statement of need is clear and target population, service delivery area and urgency are clearly outlined. The agency did not provide details of linear cost for gutters and curbs on each street.

**BUDGET**

**FUNDING REQUESTED**      **\$1,022,500.00**

**Match Funds:**      **\$0.00**

**In-kind Funds:**      **\$0.00**

**Total Project Costs:**      **\$1,022,500.00**

**Financial Comments:** No declared or documented match. Waived for interlocal agencies? No declared or documented leverage. Waived for interlocal agencies? Proposed budget amounts supported by external cost proposal. Proposed budget contains minor calculation error due to changed formulas.

**Programmatic Score:** 44      **Financial Score:** 27      **Total Score:** 71

**Amount Recommended:** \$835,280.00

<b>Previous Year's Funding:</b>	<b>2011-2012</b>	<b>2012-2013</b>	<b>2013-2014</b>
	N/A	N/A	N/A

**HOUSING & COMMUNITY DEVELOPMENT DIVISION  
2014 – 2015 UNIVERSAL APPLICATION FUNDING REQUEST**

**FACT SHEET**

**Project Title:** Lonnie C. Miller Park Improvements

**Activity Type:** Public Facility Improvement

**Agency:** City of Jacksonville - Parks & Recreation Department

**Contact Person:** Amy Ver Beek Brown,

**Contact E-Mail:** amyvbb@coj.net

**Address:** 214 N. Hogan Street, 3rd Floor, Suite 3101

**Phone Number:** 904-255-7910

**Fax Number:** 904-255-7940

**Funding Source:** CDBG      **# of People/Units to be served:** 30,000 People

**Project Description:** Funds will be used for demolition and disposal of existing park equipment and purchase and installation of new equipment for Lonnie C. Miller.

**Comments:** The agency provided a clear and excellent project description of park improvements. The agency vaguely describe the community need however, community problem was not clearly addressed and agency could have been more detail in describing the targeted population and service area.

**BUDGET**

**FUNDING REQUESTED**      **\$125,000.00**

**Match Funds:**      **\$125,000.00**

**In-kind Funds:**      **\$0.00**

**Total Project Costs:**      **\$250,000.00**

**Financial Comments:** Agency declares \$125,000 in CIP funding dedicated to project, but it is undocumented. No declared or documented leverage. Construction Budget Form is prepared incorrectly. Budget not broken out by source.

**Programmatic Score:** 39

**Financial Score:** 24

**Total Score:** 63

**Amount Recommended:** \$0.00

<b>Previous Year's Funding:</b>	<b>2011-2012</b>	<b>2012-2013</b>	<b>2013-2014</b>
	N/A	N/A	N/A

**HOUSING & COMMUNITY DEVELOPMENT DIVISION  
2014 – 2015 UNIVERSAL APPLICATION FUNDING REQUEST**

**FACT SHEET**

**Project Title:** Secure Facilities - Phase I

**Activity Type:** Public Facility Improvement

**Agency:** City of Jacksonville - Public Buildings Division

**Contact Person:** Robbie Tiedeman, Facilities Manager

**Contact E-Mail:** tiedeman@coj.net

**Address:** 555 W. 44th Street

**Phone Number:** 904-630-5406

**Fax Number:** 904-630-5415

**Funding Source:** CDBG      **# of People/Units to be served:** 0 People

**Project Description:** Funds will be used for City Hall Recore and Keying slated to impact approximately 1.25 million citizens.

**Comments:** Threshold not met. INELIGIBLE ACTIVITY - Building is used for conducting general government services. The agency did not include resumes for the Executive Director or Fiscal Officer. The agency is self-insured through the City of Jacksonville but did not include a Certificate of Insurance. The agency did not include procedures for selecting a contractor/consultant.

**BUDGET**

**FUNDING REQUESTED**      **\$5,029.53**

**Match Funds:**      **\$5,029.53**

**In-kind Funds:**      **\$0.00**

**Total Project Costs:**      **\$10,059.06**

**Financial Comments:** Agency declares \$5,029.53 in match funding dedicated to project, but it is undocumented. No declared or documented leverage. Request that program staff review eligibility for this application. This appears to be more "maintenance" than "improvement" and may fall within the federal definition of general governmental operations which would make it ineligible.

**Programmatic Score:** 0      **Financial Score:** 0      **Total Score:** 0

**Amount Recommended:** \$0.00

**Previous Year's Funding:**      **2011-2012**      **2012-2013**      **2013-2014**

N/A

N/A

N/A

**HOUSING & COMMUNITY DEVELOPMENT DIVISION  
2014 – 2015 UNIVERSAL APPLICATION FUNDING REQUEST**

**FACT SHEET**

**Project Title:** Renovation of Hillside Cottage Bathrooms

**Activity Type:** Public Facility Improvement

**Agency:** Daniel Memorial, Inc.

**Contact Person:** Ann Kelley, Director of Special Projects

**Contact E-Mail:** akelley@danielkids.org

**Address:** 4203 South point Blvd.

**Phone Number:** 904-296-1055

**Fax Number:** 904-296-1953

**Funding Source:** CDBG      **# of People/Units to be served:** 40 People

**Project Description:** Funds will be used to completely renovate four (4) bathrooms in Hillside Cottage to serve 40 at risk youth.

**Comments:** The agency described the targeted population and the project will directly address physical improvements.

**BUDGET**

**FUNDING REQUESTED**      **\$24,971.00**

**Match Funds:**      **\$24,971.00**

**In-kind Funds:**      **\$0.00**

**Total Project Costs:**      **\$49,942.00**

**Financial Comments:** Match documented via letter signed by Board Chair with copy of bank statement verifying liquidity and availability in an amount not to exceed \$30,000. No documented leverage. Construction budget amount supported by quote/bid proposal that appears reasonable. No concerns raised in the review of the agency's audit.

**Programmatic Score:** 48      **Financial Score:** 26      **Total Score:** 74

**Amount Recommended:** \$24,971.00

<b>Previous Year's Funding:</b>	<b>2011-2012</b>	<b>2012-2013</b>	<b>2013-2014</b>
	\$14,264.00	\$25,550.00	\$25,550.00



**HOUSING & COMMUNITY DEVELOPMENT DIVISION  
2014 – 2015 UNIVERSAL APPLICATION FUNDING REQUEST**

**FACT SHEET**

**Project Title:** Carrington Apartments Community Center

**Activity Type:** Public Facility Improvement

**Agency:** Jacksonville Housing Authority

**Contact Person:** Fred McKinnies, President and CEO

**Contact E-Mail:** fmckinnies@jaxha.org

**Address:** 1300 Broad Street

**Phone Number:** 904-366-3455

**Fax Number:** 904-766-4418

**Funding Source:** CDBG      **# of People/Units to be served:** 300 People

**Project Description:** Funds will be used for 50% of actual construction costs for the Community Room at Carrington Apartments.

**Comments:** The agency provided a very detailed and concise background of administering grant funds and reference their internal financial software system. The implementation schedule is not specific to the construction project and goals were not measurable, time bound or realistic.

**BUDGET**

**FUNDING REQUESTED**      **\$298,546.00**

**Match Funds:**      **\$422,915.00**

**In-kind Funds:**      **\$0.00**

**Total Project Costs:**      **\$721,461.00**

**Financial Comments:** Agency did not document proposed match. Agency included bid tabulation to support amount requested, however the lowest bid was \$585,981. It does not appear that the proposed project budget can reasonably be expected to result in a completed project. Agency had significant deficiencies and reportable conditions related to its payroll procedures and tenant eligibility procedures.

**Programmatic Score:** 43      **Financial Score:** 22      **Total Score:** 65

**Amount Recommended:** \$0.00

<b>Previous Year's Funding:</b>	<b>2011-2012</b>	<b>2012-2013</b>	<b>2013-2014</b>
	N/A	N/A	N/A

**HOUSING & COMMUNITY DEVELOPMENT DIVISION  
2014 – 2015 UNIVERSAL APPLICATION FUNDING REQUEST**

**FACT SHEET**

**Project Title:** Riviera Apartments Community Center

**Activity Type:** Public Facility Improvement

**Agency:** Jacksonville Housing Authority

**Contact Person:** Fred McKinnies, President and CEO

**Contact E-Mail:** fmckinnies@jaxha.org

**Address:** 1300 Broad Street

**Phone Number:** 904-366-3455

**Fax Number:** 904-766-4418

**Funding Source:** CDBG      **# of People/Units to be served:** 300 People

**Project Description:** Funds will be used for construction costs and civil engineering to provide space for community activities to assist 300 residents.

**Comments:** The agency provided a very detail and concise background of administering grant funds and reference their internal financial software system. However, the targeted population is not described and numbers are unrealistic and the project description does not relate to this application. The agency did not include construction estimates from a license contractor.

**BUDGET**

**FUNDING REQUESTED**      **\$207,500.00**

**Match Funds:**      **\$207,500.00**

**In-kind Funds:**      **\$0.00**

**Total Project Costs:**      **\$415,000.00**

**Financial Comments:** Agency declared match of \$346,415 by President/CEO. Budget form shows declared match of \$200,000. Documented leverage is related to service hours once the construction is complete. Cannot be used with this application. Agency included public service type budgets in addition to their construction budget. The unnecessary forms were not reviewed. Agency did not include any documentation to support amount requested. Due to the lack of documentation and the conflicting match amounts declared, the reviewer had to deem the budget incomplete and was not able to review. Agency had significant deficiencies and reportable conditions related to its payroll procedures and tenant eligibility procedures.

**Programmatic Score:** 48

**Financial Score:** 20

**Total Score:** 68

**Amount Recommended:** \$0.00

<b>Previous Year's Funding:</b>	<b>2011-2012</b>	<b>2012-2013</b>	<b>2013-2014</b>
	N/A	N/A	N/A

**HOUSING & COMMUNITY DEVELOPMENT DIVISION  
2014 – 2015 UNIVERSAL APPLICATION FUNDING REQUEST**

**FACT SHEET**

**Project Title:** Priority 1: North Point II - Phase II

**Activity Type:** Public Facility Improvement

**Agency:** Northwest Jacksonville CDC

**Contact Person:** Paul Tutwiler, Executive Director

**Contact E-Mail:** ptutwiler2003@yahoo.com

**Address:** 3416 Moncrief Road, Suite 200

**Phone Number:** 904-598-9196

**Fax Number:** 904-598-9197

**Funding Source:** CDBG      **# of People/Units to be served:** 5,000 People

**Project Description:** Funds will be used to acquire three (3) lots, including relocation to create economic development and job creation expected to impact 5,000 individuals.

**Comments:** The agency key staff has professional expertise administering grant funds. The statement of need is broad and agency did not describe the properties to be acquired.

**BUDGET**

**FUNDING REQUESTED**      **\$270,000.00**

**Match Funds:**      **\$270,000.00**

**In-kind Funds:**      **\$0.00**

**Total Project Costs:**      **\$540,000.00**

**Financial Comments:** Match: Agency declared match from three (3) external sources. External sources cannot be used to meet match requirements. Additionally, there was no board resolution or letter confirming the set aside of the declared match funds. The included construction budget did not contain any documentation regarding the costs associated with the proposed project. As such, the reviewer could not verify the appropriateness or reasonableness of the proposed budget.

**Programmatic Score:** 40

**Financial Score:** 16

**Total Score:** 56

**Amount Recommended:** \$0.00

<b>Previous Year's Funding:</b>	<b>2011-2012</b>	<b>2012-2013</b>	<b>2013-2014</b>
	N/A	\$70,000.00	\$70,000.00

**HOUSING & COMMUNITY DEVELOPMENT DIVISION  
2014 – 2015 UNIVERSAL APPLICATION FUNDING REQUEST**

**FACT SHEET**

**Project Title:** Klutho Building Improvements

**Activity Type:** Public Facility Improvement

**Agency:** Operation New Hope

**Contact Person:** Robert Ownby, Housing Rehab Program Manager

**Contact E-Mail:** rownby@operationnewhope.com

**Address:** 1830 N. Main Street

**Phone Number:** 904-354-4673

**Fax Number:** 904-407-3729

**Funding Source:** CDBG      **# of People/Units to be served:** 500 People

**Project Description:** Funds will be used to provide improvements to the Klutho Building for Fire System, engineering and elevator upgrades with an expected impact to 500 people.

**Comments:** The agency has extensive background in construction programs. The statement of need were clear and concise however, statistics are not relevant to Jacksonville.

**BUDGET**

**FUNDING REQUESTED**      **\$8,837.50**

**Match Funds:**      **\$8,837.50**

**In-kind Funds:**

**Total Project Costs:**      **\$17,675.00**

**Financial Comments:** Agency match was properly documented by a Board resolution dated April 4, 2014. Management letter comments related to small size of the organization.

**Programmatic Score:** 52      **Financial Score:** 27      **Total Score:** 79

**Amount Recommended:** \$8,837.00

<b>Previous Year's Funding:</b>	<b>2011-2012</b>	<b>2012-2013</b>	<b>2013-2014</b>
	\$39,550.00	N/A	N/A

**HOUSING & COMMUNITY DEVELOPMENT DIVISION  
2014 – 2015 UNIVERSAL APPLICATION FUNDING REQUEST**

**FACT SHEET**

**Project Title:** Parking Lot Rehabilitation - Phase II

**Activity Type:** Public Facility Improvement

**Agency:** Operation New Hope

**Contact Person:** Robert Ownby, Housing Rehab Program Manager

**Contact E-Mail:** rownby@operationnewhope.com

**Address:** 1830 N. Main Street

**Phone Number:** 904-354-4673

**Fax Number:** 904-407-3729

**Funding Source:** CDBG      **# of People/Units to be served:** 500 People

**Project Description:** Funds will be used for parking lot improvements to include: pavers (6500 sq. ft. @ \$10/sq. ft.), irrigation, striping, excavation, dumpsters, surveys and compaction tests to assist 500 in Historic Springfield.

**Comments:** The agency has extensive background in construction programs. The agency did not describe clients in their goals and objectives.

**BUDGET**

**FUNDING REQUESTED**      **\$41,500.00**

**Match Funds:**      **\$41,500.00**

**In-kind Funds:**

**Total Project Costs:**      **\$83,000.00**

**Financial Comments:** Agency properly documented match by Board Resolution dated April 4, 2014. Agency did not declare any leverage funds for this project. The construction budget did not contain any documentation regarding the costs associated with the proposed project. As such, the reviewer could not verify the appropriateness or reasonableness of the proposed budget.

**Programmatic Score:** 52      **Financial Score:** 18      **Total Score:** 70

**Amount Recommended:** \$41,500.00

<b>Previous Year's Funding:</b>	<b>2011-2012</b>	<b>2012-2013</b>	<b>2013-2014</b>
	\$122,575.00	N/A	N/A

**HOUSING & COMMUNITY DEVELOPMENT DIVISION  
2014 – 2015 UNIVERSAL APPLICATION FUNDING REQUEST**

**FACT SHEET**

**Project Title:** Solution That Saves at Village on Wiley

**Activity Type:** Public Service

**Agency:** Ability Housing of Northeast Florida, Inc.

**Contact Person:** Shannon Nazworth, Executive Director/Fiscal Officer

**Contact E-Mail:** snazworth@abilityhousing.org

**Address:** 76 South Laura Street, Suite 303

**Phone Number:** 904-359-9650

**Fax Number:** 904-359-9653

**Funding Source:** CDBG      **# of People/Units to be served:** 45 People

**Project Description:** Funds will be used for direct personnel services to 45 clients to assist with affordable housing development at the Village on Wiley.

**Comments:** Threshold not met. Agency did not attend Mandatory Technical Assistance workshops.

**BUDGET**

**FUNDING REQUESTED**      **\$40,800.00**

**Match Funds:**      **\$42,300.00**

**In-kind Funds:**      **\$40,400.00**

**Total Project Costs:**      **\$123,500.00**

**Financial Comments:**

**Programmatic Score:** 0      **Financial Score:** 0      **Total Score:** 0

**Amount Recommended:** \$0.00

<b>Previous Year's Funding:</b>	<b>2011-2012</b>	<b>2012-2013</b>	<b>2013-2014</b>
	N/A	N/A	N/A

**HOUSING & COMMUNITY DEVELOPMENT DIVISION  
2014 – 2015 UNIVERSAL APPLICATION FUNDING REQUEST**

**FACT SHEET**

**Project Title:** Priority 1: Emergency On-Site Sheltering (E.O.S.) Project at The Arc Village

**Activity Type:** Public Service

**Agency:** Arc Jacksonville, Inc. (The)

**Contact Person:** Judy Hall Lanier, Director of Development

**Contact E-Mail:** jhall\_lanier@arcjacksonville.org

**Address:** 1050 N. Davis Street

**Phone Number:** 904-355-0155

**Fax Number:** 904-355-9616

**Funding Source:** CDBG      **# of People/Units to be served:** 200 People

**Project Description:** Funds will be used for operating supplies to provide a state-of-the-art emergency shelter that will assist 200 individuals with intellectual and developmental disabilities from the Arc Village and nearby neighborhoods.

**Comments:** Agency's management letter stated improper segregation of duties that have been resolved now with process changes. Statistics provided a broad overview for Duval but not specific to the area they have identified. Target population is well-identified delivery services area is not clearly described. Agency did not describe the need of permanent housing they only addressed the need for emergency housing. Agency have not addressed whether construction has yet begun nor do they provide proof of proper ownership. Agency indicated providing staff training, the only "goal" we could identify that needs funding is purchasing vehicle, generator and emergency equipment and cannot ascertain if project is realistic or time bound as we do not know if construction has started yet. Agency included one (1) letter of support.

**BUDGET**

<b><u>FUNDING REQUESTED</u></b>	<b>\$165,922.00</b>
<b>Match Funds:</b>	<b>\$685,566.45</b>
<b>In-kind Funds:</b>	<b>\$0.00</b>
<b>Total Project Costs:</b>	<b>\$851,488.45</b>

**Financial Comments:** Agency declared match from private contributions, but there is no documentation and the declaration is not supported by a Board resolution or letter. Agency declared leverage funding from an award related to the construction of the facility. Construction funding cannot be used as leverage for service activities unless it can be determined as an eligible expense. Budget Narrative Form does not contain any dollar amounts for the various line item budgets. Could not determine the appropriateness or reasonableness of the proposed budget due to the above problems. Management letter comments related to improper segregation of duties. Matter appears to be resolved by process changes. Audit was due 1/31/14 but not received until 2/20/14.

<b>Programmatic Score:</b> <u>36</u>	<b>Financial Score:</b> <u>16</u>	<b>Total Score:</b> <u>52</u>
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**Amount Recommended:** \$0.00

<b>Previous Year's Funding:</b>	<b>2011-2012</b>	<b>2012-2013</b>	<b>2013-2014</b>
	N/A	N/A	N/A

Revised: July 17, 2014

**HOUSING & COMMUNITY DEVELOPMENT DIVISION  
2014 – 2015 UNIVERSAL APPLICATION FUNDING REQUEST**

**FACT SHEET**

**Project Title:** Priority 2: The Arc PATH (People Accessing Their Habitats)

**Activity Type:** Public Service

**Agency:** Arc Jacksonville, Inc. (The)

**Contact Person:** Charlotte Temple, Advocacy Director

**Contact E-Mail:** ctemple@arcjacksonville.org

**Address:** 1050 N. Davis Street

**Phone Number:** 904-358-1200

**Fax Number:** 904-358-3800

**Funding Source:** CDBG      **# of People/Units to be served:** 875 People

**Project Description:** Funds will be used for direct personnel services to provide information and support through training, referrals, guardianship services available and accessible to 875 individuals with disabilities and operating cost.

**Comments:** The agency statement of need clearly described with local and relevant statistics. Agency included four (4) letters of support.

**BUDGET**

<b><u>FUNDING REQUESTED</u></b>	<b>\$42,700.00</b>
<b>Match Funds:</b>	<b>\$21,234.76</b>
<b>In-kind Funds:</b>	<b>\$82,068.06</b>
<b>Total Project Costs:</b>	<b>\$336,002.82</b>

**Financial Comments:** Agency declared match from private contributions, but there is no documentation and the declaration is not supported by a Board resolution or letter. Agency does not appear to have the 100% match required for PSG activities. Management letter comments related to improper segregation of duties. Matter appears to be resolved by process changes. Audit was due 1/31/14 but not received until 2/20/14.

**Programmatic Score:** 44      **Financial Score:** 30      **Total Score:** 74

**Amount Recommended:** \$20,000.00

<b>Previous Year's Funding:</b>	<b>2011-2012</b>	<b>2012-2013</b>	<b>2013-2014</b>
	\$29,120.00	\$27,664.00	\$27,664.00



**HOUSING & COMMUNITY DEVELOPMENT DIVISION  
2014 – 2015 UNIVERSAL APPLICATION FUNDING REQUEST**

**FACT SHEET**

**Project Title:** The Weaver Zone Initiative

**Activity Type:** Public Service

**Agency:** Bridge of Northeast Florida, Inc. (The)

**Contact Person:** Donna Arias, President / COO

**Contact E-Mail:** donna@bridgejax.com

**Address:** 1824 N. Pearl Street

**Phone Number:** 904-354-7799 x133

**Fax Number:** 904-354-6352

**Funding Source:** CDBG      **# of People/Units to be served:** 140 People

**Project Description:** Funds will be used for 50% of salaries, wages & benefits for Controller and direct personnel services to provide administrative services and activities to the after-school and summer camp to 140 at risk youth.

**Comments:** This agency has demonstrated their ability to meet and/or exceed program goals during previous funding cycles. Agency has detailed information regarding budgeting software and procedures for financial grant management. There is no indication of issues with internal controls. Narrative clearly details expertise of key staff.

**BUDGET**

<b><u>FUNDING REQUESTED</u></b>	<b>\$50,000.00</b>
<b>Match Funds:</b>	<b>\$50,219.00</b>
<b>In-kind Funds:</b>	<b>\$50,219.00</b>
<b>Total Project Costs:</b>	<b>\$361,662.00</b>

**Financial Comments:** Agency declared two (2) match funding sources but did not document either. It does not appear that the agency has the required 100% match for CDBG PSG type activities. Agency declared and documented leveraging from two (2) external sources. Aside from the match issues raised above, the agency's budget appears to be reasonable.

**Programmatic Score:** 53      **Financial Score:** 33      **Total Score:** 86

**Amount Recommended:** \$38,800.00

<b>Previous Year's Funding:</b>	<b>2011-2012</b>	<b>2012-2013</b>	<b>2013-2014</b>
	\$38,220.00	\$40,000.00	\$40,000.00

**HOUSING & COMMUNITY DEVELOPMENT DIVISION  
2014 – 2015 UNIVERSAL APPLICATION FUNDING REQUEST**

**FACT SHEET**

**Project Title:** Case Management Emergency Financial Assistance Program

**Activity Type:** Public Service

**Agency:** Catholic Charities Bureau, Inc. Jacksonville Regional Office

**Contact Person:** Jennifer Garizio, Executive Director

**Contact E-Mail:** jgarizio@ccbjax.org

**Address:** 134 E. Church Street

**Phone Number:** 904-354-4846 x246

**Fax Number:** 904-224-0092

**Funding Source:** CDBG      **# of People/Units to be served:** 5,250 Households

**Project Description:** Funds will be used for direct personnel services to provide emergency assistance and/or supplemental services to 5,250 families to avoid eviction/foreclosure or cutoff of utilities and/or to meet essential household needs.

**Comments:** The agency tracking and reporting systems are in place and function well. Minimal technical assistance need for grant administration and internal controls are identified. Agency accessed four (4) studies with three (3) of the local to Jacksonville. Target population and service delivery area clearly identified and urgency is addressed. Project staff was clearly identified with job responsibilities included for each. Agency provided an good implementation schedule with SMART goals and objectives. Included multiple letters of support.

**BUDGET**

**FUNDING REQUESTED**      **\$100,000.00**

**Match Funds:**      **\$788,900.31**

**In-kind Funds:**      **\$391,245.00**

**Total Project Costs:**      **\$1,280,145.31**

**Financial Comments:** Agency declared and documented match, however, that match does not meet the 100% match requirement for CDBG/PSG activities. Agency declared and documented multiple forms of leverage. Budget is adequately documented for line items in proposed project. Amounts appear to be both appropriate and reasonable. Audit due 10/31/13, Received 10/31/13. Several minor management letter comments. the agency's response and planned mitigating actions appear adequate.

**Programmatic Score:** 55

**Financial Score:** 30

**Total Score:** 85

**Amount Recommended:** \$50,974.00

<b>Previous Year's Funding:</b>	<b>2011-2012</b>	<b>2012-2013</b>	<b>2013-2014</b>
	\$55,317.00	\$52,551.00	\$52,551.00

Revised: July 17, 2014

**HOUSING & COMMUNITY DEVELOPMENT DIVISION  
2014 – 2015 UNIVERSAL APPLICATION FUNDING REQUEST**

**FACT SHEET**

**Project Title:** Fair Housing Event

**Activity Type:** Public Service

**Agency:** City of Jacksonville - Jacksonville Human Rights Commission

**Contact Person:** Charlene Taylor-Hill, Executive Director

**Contact E-Mail:** charlene@coj.net

**Address:** 117 W. Duval Street, Suite 350

**Phone Number:** 904-630-4901

**Fax Number:** 904-630-4918

**Funding Source:** CDBG      **# of People/Units to be served:** 400 People

**Project Description:** Funds will be used to provide educational materials and workshops to market fair housing programs and advertisements to educate 400 individual on the Fair Housing laws.

**Comments:** The agency provided a clear and concise description. Agency used most recent CAPER for statistics. The targeted population and service delivery area need further clarification and detail. Although the description provides information about their mission and a broad overview of their expected delivery, there is no specific mention of the Fair Housing Event, which is a part of this project and cannot quantify any potential increase in-service. Agency implementation schedule is valid and goals are SMART and measurable. Agency provided three (3) letters of support.

**BUDGET**

**FUNDING REQUESTED**      **\$25,000.00**

**Match Funds:**      **\$45,132.00**

**In-kind Funds:**      **\$0.00**

**Total Project Costs:**      **\$70,132.00**

**Financial Comments:** No declared or documented match.

**Programmatic Score:** 39      **Financial Score:** 31      **Total Score:** 70

**Amount Recommended:** \$20,000.00

<b>Previous Year's Funding:</b>	<b>2011-2012</b>	<b>2012-2013</b>	<b>2013-2014</b>
	\$25,000.00	\$25,000.00	\$25,000.00

**HOUSING & COMMUNITY DEVELOPMENT DIVISION  
2014 – 2015 UNIVERSAL APPLICATION FUNDING REQUEST**

**FACT SHEET**

**Project Title:** Jacksonville Youthbuild AmeriCorps Program

**Activity Type:** Public Service

**Agency:** City of Jacksonville - Office of Grants and Contract Compliance

**Contact Person:** Thomas Waters, Grants Administrator

**Contact E-Mail:** twaters@coj.net

**Address:** 214 N. Hogan Street, 4th floor

**Phone Number:** 904-255-8742

**Fax Number:** 904-255-8256

**Funding Source:** CDBG      **# of People/Units to be served:** 30 People

**Project Description:** Funds will be used for direct personnel services and operating cost to provide educational instruction to 63 homeless at-risk incarcerated males ages 18-24 and youth, age 16-24 who have been incarcerated, youths with special needs, youths aging out of foster care and adjudicated youths.

**Comments:** The agency community problem clearly defined with numerous local statistics to document the need. Targeted population is very well defined along with service delivery area and urgency is defined, although this continues to be an on-going need. The project description provides an update to the originally identified target population and funding will provide the ability to maintain current level of service. Agency implementation schedule is valid, however, goals are unclear (could be due to error on date). Agency included two (2) letters of support.

**BUDGET**

<b><u>FUNDING REQUESTED</u></b>	<b>\$50,000.00</b>
<b>Match Funds:</b>	<b>\$80,000.00</b>
<b>In-kind Funds:</b>	<b>\$0.00</b>
<b>Total Project Costs:</b>	<b>\$130,000.00</b>

**Financial Comments:** Agency declares \$80,000 in match funds, but it is undocumented. No declared or documented leverage. Budget Summary Form is mathematically incorrect. Sources does not equal uses. ITD allocation to grant seems disproportionate. If awarded, we would need to look at refining the budget. If awarded, we would need to closely review the promotional activities for eligibility purposes.

**Programmatic Score:** 41      **Financial Score:** 29      **Total Score:** 70

**Amount Recommended:** \$25,000.00

<b>Previous Year's Funding:</b>	<b>2011-2012</b>	<b>2012-2013</b>	<b>2013-2014</b>
	N/A	\$25,873.00	\$25,873.00

Revised: July 17, 2014

**HOUSING & COMMUNITY DEVELOPMENT DIVISION  
2014 – 2015 UNIVERSAL APPLICATION FUNDING REQUEST**

**FACT SHEET**

**Project Title:** Independent Living/Senior Care Program

**Activity Type:** Public Service

**Agency:** City of Jacksonville - Senior Services Division

**Contact Person:** Joan Turner, Program Manager

**Contact E-Mail:** joant@coj.net

**Address:** 117 W. Duval Street, Suite 215

**Phone Number:** 904-630-0966

**Fax Number:** 904-630-0953

**Funding Source:** CDBG      **# of People/Units to be served:** 0 People

**Project Description:** Funds will be used for administrative costs for 25 respite workers to continue essential respite care and volunteer services to 150 home-bound elderly persons and their caregivers.

**Comments:** The agency community need very detailed, with current statistics and based on the urgency there's a definite need in the community.

**BUDGET**

**FUNDING REQUESTED**      **\$121,200.00**

**Match Funds:**      **\$146,755.00**

**In-kind Funds:**      **\$0.00**

**Total Project Costs:**      **\$267,975.00**

**Financial Comments:** Agency declares \$146,755 in match funding dedicated to project, but it is undocumented. No declared or documented leverage.

**Programmatic Score:** 49      **Financial Score:** 30      **Total Score:** 79

**Amount Recommended:** \$120,008.00

<b>Previous Year's Funding:</b>	<b>2011-2012</b>	<b>2012-2013</b>	<b>2013-2014</b>
	\$127,036.00	\$121,220.00	\$121,220.00

**HOUSING & COMMUNITY DEVELOPMENT DIVISION  
2014 – 2015 UNIVERSAL APPLICATION FUNDING REQUEST**

**FACT SHEET**

**Project Title:** Special Programs for Older Adults

**Activity Type:** Public Service

**Agency:** City of Jacksonville - Senior Services Division

**Contact Person:** Mary Ferrell, Program Manager

**Contact E-Mail:** mferrell@coj.net

**Address:** 117 W. Duval Street, Suite 220

**Phone Number:** 904-630-2681

**Fax Number:** 904-630-0819

**Funding Source:** CDBG      **# of People/Units to be served:** 18,005 People

**Project Description:** Funds will be used for administrative and activity cost to provide opportunities for 18,005 seniors to remain active and independent through special events and programs.

**Comments:** The agency clearly described in detail the community need with current statistics. The agency described the project and events of the SPOA program.

**BUDGET**

<b><u>FUNDING REQUESTED</u></b>	<b>\$48,239.00</b>
<b>Match Funds:</b>	<b>\$72,352.09</b>
<b>In-kind Funds:</b>	<b>\$172,485.26</b>
<b>Total Project Costs:</b>	<b>\$293,076.35</b>

**Financial Comments:** Agency declares \$244,837.35 in match funding dedicated to project, but it is undocumented. No declared or documented leverage. Any portion of this budget relating to meals must be specifically identified as such in the appropriation legislation.

**Programmatic Score:** 49      **Financial Score:** 30      **Total Score:** 79

**Amount Recommended:** \$46,792.00

<b>Previous Year's Funding:</b>	<b>2011-2012</b>	<b>2012-2013</b>	<b>2013-2014</b>
	\$50,778.00	\$48,239.00	\$48,239.00

**HOUSING & COMMUNITY DEVELOPMENT DIVISION  
2014 – 2015 UNIVERSAL APPLICATION FUNDING REQUEST**

**FACT SHEET**

**Project Title:** The Foster Grandparent Program of Jacksonville

**Activity Type:** Public Service

**Agency:** City of Jacksonville - Senior Services Division

**Contact Person:** Maliza McMillan, Social Service Supervisor

**Contact E-Mail:** mmcmill@coj.net

**Address:** 150 East 1st Street

**Phone Number:** 904-630-5450

**Fax Number:** 904-630-0635

**Funding Source:** CDBG      **# of People/Units to be served:** 350 People

**Project Description:** Funds will be used for stipends to 18 low income senior citizens who will function as tutors and mentors to 350 children with academic and emotional difficulties.

**Comments:** The agency clearly described the community need in failing schools. The agency's project description were clear, concise and specific.

**BUDGET**

<b><u>FUNDING REQUESTED</u></b>	<b>\$31,800.00</b>
<b>Match Funds:</b>	<b>\$437,741.00</b>
<b>In-kind Funds:</b>	<b>\$22,884.00</b>
<b>Total Project Costs:</b>	<b>\$492,425.00</b>

**Financial Comments:** Agency declares \$460,625 in match funding dedicated to project, but it is undocumented. No declared or documented leverage.

**Programmatic Score:** 53      **Financial Score:** 30      **Total Score:** 83

**Amount Recommended:** \$31,000.00

<b>Previous Year's Funding:</b>	<b>2011-2012</b>	<b>2012-2013</b>	<b>2013-2014</b>
	\$28,938.00	\$30,210.00	\$30,210.00

**HOUSING & COMMUNITY DEVELOPMENT DIVISION  
2014 – 2015 UNIVERSAL APPLICATION FUNDING REQUEST**

**FACT SHEET**

**Project Title:** The Jacksonville Senior Surfers Project

**Activity Type:** Public Service

**Agency:** City of Jacksonville - Senior Services Division

**Contact Person:** Mary Holley, Acting Chief

**Contact E-Mail:** mholley@coj.net

**Address:** 117 W. Duval Street, Suite 210

**Phone Number:** 904-630-0995

**Fax Number:** 904-630-3639

**Funding Source:** CDBG      **# of People/Units to be served:** 125 People

**Project Description:** Funds will be used to purchase equipment and office supplies to support the training of 25 senior citizen trainers to provide additional training to 125 senior citizens at the Mary L. Singletary Center and the Jim Fortuna Center.

**Comments:** The agency provided statistical data reference seniors are low to moderate income, which does not support the need of the project. Although some seniors are technologically disadvantaged, there are many other option to obtain this type of training for seniors but no urgency.

**BUDGET**

<b><u>FUNDING REQUESTED</u></b>	<b>\$83,413.47</b>
<b>Match Funds:</b>	<b>\$85,366.50</b>
<b>In-kind Funds:</b>	<b>\$0.00</b>
<b>Total Project Costs:</b>	<b>\$168,779.97</b>

**Financial Comments:** Agency declares \$85,366.50 in match funding dedicated to project, but it is undocumented. No declared or documented leverage. Reviewer is assuming that the large equipment purchase is necessary for the implementation of the program. If the program meets funding guidelines, then additional quotes would be necessary. The amounts proposed appear to be the current retail list price without discount for bulk purchases or reduced governmental prices.

**Programmatic Score:** 36      **Financial Score:** 27      **Total Score:** 63

**Amount Recommended:** \$0.00

<b>Previous Year's Funding:</b>	<b>2011-2012</b>	<b>2012-2013</b>	<b>2013-2014</b>
	N/A	N/A	N/A



**HOUSING & COMMUNITY DEVELOPMENT DIVISION  
2014 – 2015 UNIVERSAL APPLICATION FUNDING REQUEST**

**FACT SHEET**

**Project Title:** Carver Center Recreational Programs

**Activity Type:** Public Service

**Agency:** City of Jacksonville Beach

**Contact Person:** Gary Meadors, Director, Park & Recreation

**Contact E-Mail:** gmeadors@jaxbchfl.net

**Address:** 11 N. Third Street

**Phone Number:** 904-247-6236

**Fax Number:** 904-247-6143

**Funding Source:** CDBG      **# of People/Units to be served:** 125 People

**Project Description:** Funds will be used for direct personnel services to provide supervised recreational and educational opportunities for 125 low and moderate income youth in the community.

**Comments:** The agency clearly addressed the need of the project with relevant statistics to Duval County but not specific to Jacksonville Beach. The applicant did a good job in describing the service area and provided map.

**BUDGET**

<b><u>FUNDING REQUESTED</u></b>	<b>\$82,177.94</b>
<b>Match Funds:</b>	<b>\$70,347.82</b>
<b>In-kind Funds:</b>	<b>\$8,675.47</b>
<b>Total Project Costs:</b>	<b>\$145,348.67</b>

**Financial Comments:** Agency declares \$79,023.29 in match funding dedicated to project, but it is undocumented. No declared or documented leverage.

**Programmatic Score:** 35      **Financial Score:** 30      **Total Score:** 65

**Amount Recommended:** \$80,759.00

<b>Previous Year's Funding:</b>	<b>2011-2012</b>	<b>2012-2013</b>	<b>2013-2014</b>
	\$73,794.00	\$62,883.00	\$62,883.00

**HOUSING & COMMUNITY DEVELOPMENT DIVISION  
2014 – 2015 UNIVERSAL APPLICATION FUNDING REQUEST**

**FACT SHEET**

**Project Title:** Community Assisted Policing Effort (CAPE)

**Activity Type:** Public Service

**Agency:** City of Jacksonville Beach

**Contact Person:** Gary Meadors, Director, Park & Recreation

**Contact E-Mail:** gmeadors@jaxbchfl.net

**Address:** 11 N. Third Street

**Phone Number:** 904-247-6236

**Fax Number:** 904-247-6143

**Funding Source:** CDBG      **# of People/Units to be served:** 3,770 People

**Project Description:** Funds will be used for direct personnel services to reduce crime in the Pablo Beach South for the Community Assisted Policing Effort (C.A.P.E) program assisting 3,770 individuals.

**Comments:** The agency clearly addressed the need for the project. The applicant did a good job in describing the service area and provided maps.

**BUDGET**

**FUNDING REQUESTED**      **\$62,311.34**

**Match Funds:**      **\$27,821.00**

**In-kind Funds:**      **\$0.00**

**Total Project Costs:**      **\$90,132.34**

**Financial Comments:** Agency declares \$27,821.00 in match funding dedicated to project, but it is undocumented. No declared or documented leverage.

**Programmatic Score:** 41      **Financial Score:** 30      **Total Score:** 71

**Amount Recommended:** \$58,116.00

<b>Previous Year's Funding:</b>	<b>2011-2012</b>	<b>2012-2013</b>	<b>2013-2014</b>
	\$62,829.00	\$63,982.00	\$63,982.00

**HOUSING & COMMUNITY DEVELOPMENT DIVISION  
2014 – 2015 UNIVERSAL APPLICATION FUNDING REQUEST**

**FACT SHEET**

**Project Title:** Senior Activity Center

**Activity Type:** Public Service

**Agency:** City of Neptune Beach

**Contact Person:** Leslie B. Lyne, Senior Activity Center Director

**Contact E-Mail:** llyne@neptune-beach.com

**Address:** 2004 Forest Avenue

**Phone Number:** 904-270-1688

**Fax Number:** 904-270-1689

**Funding Source:** CDBG      **# of People/Units to be served:** 1,100 People

**Project Description:** Funds will be used for approximately 59% of salary, wages and benefits for one (1) Program Manager and 100% of salary, wages and benefits for one (1) PT Administrative Assistant to coordinate activities and special programs for aging adults..

**Comments:** The agency clearly addressed the need for the project with information relevant to Neptune Beach and referenced multiple studies.

**BUDGET**

<b><u>FUNDING REQUESTED</u></b>	<b>\$46,521.00</b>
<b>Match Funds:</b>	<b>\$56,627.00</b>
<b>In-kind Funds:</b>	<b>\$0.00</b>
<b>Total Project Costs:</b>	<b>\$100,596.00</b>

**Financial Comments:** Agency declares \$54,075 in match funding dedicated to project, but it is undocumented. Women's Club leverage of \$2,000.

**Programmatic Score:** 46      **Financial Score:** 30      **Total Score:** 76

**Amount Recommended:** \$45,469.00

<b>Previous Year's Funding:</b>	<b>2011-2012</b>	<b>2012-2013</b>	<b>2013-2014</b>
	\$49,497.00	\$43,969.00	\$43,969.00

**HOUSING & COMMUNITY DEVELOPMENT DIVISION  
2014 – 2015 UNIVERSAL APPLICATION FUNDING REQUEST**

**FACT SHEET**

**Project Title:** Priority 1: Transitional Housing and Vocational Training with Supportive Services

**Activity Type:** Public Service

**Agency:** Clara White Mission, Inc.

**Contact Person:** JuCoby Pittman-Peele, Chief Executive Officer

**Contact E-Mail:** jpittman@clarawhitemission.org

**Address:** 613 West Ashley Street

**Phone Number:** 904-354-4162 x103

**Fax Number:** 904-791-4360

**Funding Source:** CDBG      **# of People/Units to be served:** 250 People

**Project Description:** Funds will be used for direct personnel services to provide vocational training, transitional housing, case management and supportive services to 250 homeless persons.

**Comments:** This agency demonstrated their ability to meet and/or exceed program goals during previous funding cycles. The agency provided detailed information regarding budgeting software and procedures for financial grant management. The statistics are relevant and target population is identified along with service delivery area and urgency.

**BUDGET**

<b><u>FUNDING REQUESTED</u></b>	<b>\$68,577.00</b>
<b>Match Funds:</b>	<b>\$544,653.00</b>
<b>In-kind Funds:</b>	<b>\$0.00</b>
<b>Total Project Costs:</b>	<b>\$613,230.00</b>

**Financial Comments:** There is no match documentation included with financial review package. No match form included with financial review package. No leverage form included with financial review package.

**Programmatic Score:** 58      **Financial Score:** 29      **Total Score:** 87

**Amount Recommended:** \$57,232.00

<b>Previous Year's Funding:</b>	<b>2011-2012</b>	<b>2012-2013</b>	<b>2013-2014</b>
	\$62,108.00	\$59,003.00	\$59,003.00

**HOUSING & COMMUNITY DEVELOPMENT DIVISION  
2014 – 2015 UNIVERSAL APPLICATION FUNDING REQUEST**

**FACT SHEET**

**Project Title:** Employment & Business Development Program

**Activity Type:** Public Service

**Agency:** Community Connections of Jacksonville, Inc.

**Contact Person:** Lelia A. Duncan, President / CEO

**Contact E-Mail:** lduncan@communityconnectionsjax.org

**Address:** 327 E. Duval Street

**Phone Number:** 904-350-9949

**Fax Number:** 904-350-9775

**Funding Source:** CDBG      **# of People/Units to be served:** 180 Households

**Project Description:** Funds will be used to assist homeless and impoverished families increase literacy, identify sound employment options, plan careers, and find living-wage employment that will break cycles of poverty and provide real and lasting change for 180 families.

**Comments:** The agency clearly describes the community problem and target population identified along with service delivery area and urgency. The agency provided a detailed project description.

**BUDGET**

<b><u>FUNDING REQUESTED</u></b>	<b>\$85,600.00</b>
<b>Match Funds:</b>	<b>\$85,994.00</b>
<b>In-kind Funds:</b>	<b>\$0.00</b>
<b>Total Project Costs:</b>	<b>\$171,594.00</b>

**Financial Comments:** Agency did not include match form identifying any declared match. There was no documentation from the agency's board setting aside any match. Agency did not include form identifying any declared leverage.

**Programmatic Score:** 45      **Financial Score:** 27      **Total Score:** 72

**Amount Recommended:** \$20,000.00

<b>Previous Year's Funding:</b>	<b>2011-2012</b>	<b>2012-2013</b>	<b>2013-2014</b>
	\$29,010.00	\$25,873.00	\$25,873.00

**HOUSING & COMMUNITY DEVELOPMENT DIVISION  
2014 – 2015 UNIVERSAL APPLICATION FUNDING REQUEST**

**FACT SHEET**

**Project Title:** Elder Health Literacy Program

**Activity Type:** Public Service

**Agency:** Edward Waters College

**Contact Person:** Marie Heath, Director

**Contact E-Mail:** mheath@ewc.edu

**Address:** 1658 Kings Road

**Phone Number:** 904-470-8933

**Fax Number:** 904-470-8933

**Funding Source:** CDBG      **# of People/Units to be served:** 100 People

**Project Description:** Funds will be used to provide direct personnel services costs for 100 senior citizens in maintaining good health and independence through awareness and access to healthy living practices.

**Comments:** The agency provided a concise statement of need with well documented plans, studies and targeted population in narrative.

**BUDGET**

<b><u>FUNDING REQUESTED</u></b>	<b>\$48,084.00</b>
<b>Match Funds:</b>	<b>\$129,947.00</b>
<b>In-kind Funds:</b>	<b>\$20,000.00</b>
<b>Total Project Costs:</b>	<b>\$198,031.00</b>

**Financial Comments:** Leverage from Family Support Services. Budget Summary Form is mathematically incorrect.

**Programmatic Score:** 52      **Financial Score:** 28      **Total Score:** 80

**Amount Recommended:** \$26,967.00

<b>Previous Year's Funding:</b>	<b>2011-2012</b>	<b>2012-2013</b>	<b>2013-2014</b>
	\$28,160.00	\$26,752.00	\$26,752.00

**HOUSING & COMMUNITY DEVELOPMENT DIVISION  
2014 – 2015 UNIVERSAL APPLICATION FUNDING REQUEST**

**FACT SHEET**

**Project Title:** Child Welfare-Early Education Partnership (CWEENP)

**Activity Type:** Public Service

**Agency:** Family Support Services of North Florida, Inc.

**Contact Person:** Cynthia D. Harpman, Sr. Program Analyst

**Contact E-Mail:** cynthia.harpman@fssnf.org

**Address:** 4057 Carmichael Avenue, Suite 101

**Phone Number:** 904-432-2714

**Fax Number:** 904-421-5803

**Funding Source:** CDBG      **# of People/Units to be served:** 1,500 People

**Project Description:** Funds will be used to provide adequate and appropriate early child education and other support services, including case management, to 1,500 at risk children ages birth to five (5) years old.

**Comments:** The agency provided a very detailed and comprehensive overview of agency. The agency project description was detail, concise and comprehensive with SMART goals and objectives.

**BUDGET**

<b><u>FUNDING REQUESTED</u></b>	<b>\$56,479.00</b>
<b>Match Funds:</b>	<b>\$860,914.00</b>
<b>In-kind Funds:</b>	<b>\$44,200.00</b>
<b>Total Project Costs:</b>	<b>\$961,593.00</b>

**Financial Comments:** Board President documented match. Properly documented leverage.

**Programmatic Score:** 60      **Financial Score:** 33      **Total Score:** 93

**Amount Recommended:** \$28,810.00

<b>Previous Year's Funding:</b>	<b>2011-2012</b>	<b>2012-2013</b>	<b>2013-2014</b>
	N/A	N/A	N/A

**HOUSING & COMMUNITY DEVELOPMENT DIVISION  
2014 – 2015 UNIVERSAL APPLICATION FUNDING REQUEST**

**FACT SHEET**

**Project Title:** Community Development Girl Scout Troops (Niamoja)

**Activity Type:** Public Service

**Agency:** Girl Scouts of Gateway Council, Inc.

**Contact Person:** Linda Hull, Chief Development Officer

**Contact E-Mail:** lhull@girlscouts-gateway.org

**Address:** 1000 Shearer Street

**Phone Number:** 904-421-3484

**Fax Number:** 904-384-1542

**Funding Source:** CDBG      **# of People/Units to be served:** 500 People

**Project Description:** Funds will be used for to promote girl scouting programs to 500 individuals in public housing complexes.

**Comments:** The agency has a track record for administering grant funds.

**BUDGET**

<b><u>FUNDING REQUESTED</u></b>	<b>\$47,669.96</b>
<b>Match Funds:</b>	<b>\$140,663.72</b>
<b>In-kind Funds:</b>	<b>\$44,147.16</b>
<b>Total Project Costs:</b>	<b>\$232,481.44</b>

**Financial Comments:** Minimum match requirements met and exceeded. Leverage documented appropriately. Documented leverage funds were not included in project budget. Budget could not be scored as it was incomplete and omits a large portion of the project funding. No concerns raised during financial analysis. No concerns raised in review of Agency's audit.

**Programmatic Score:** 57      **Financial Score:** 22      **Total Score:** 79

**Amount Recommended:** \$35,753.00

<b>Previous Year's Funding:</b>	<b>2011-2012</b>	<b>2012-2013</b>	<b>2013-2014</b>
	\$38,516.00	N/A	N/A



**HOUSING & COMMUNITY DEVELOPMENT DIVISION  
2014 – 2015 UNIVERSAL APPLICATION FUNDING REQUEST**

**FACT SHEET**

**Project Title:** Priority 1: Hollybrook Enrichment Center

**Activity Type:** Public Service

**Agency:** Hollybrook Homes, Inc.

**Contact Person:** Lynn Griffin, Sr., Registered Agent, Director

**Contact E-Mail:** consultcato@msn.com

**Address:** 104 King Street

**Phone Number:** 904-389-1196

**Fax Number:**

**Funding Source:** CDBG      **# of People/Units to be served:** 525 People

**Project Description:** Funds will be used to provide access to programs and services that improve job skills, further education and assist 525 low-income families to become economically independent, thereby reducing the effects of crime, poverty and unemployment.

**Comments:** The agency statement of need was very detailed with local studies to support the documentation. The targeted population and urgency are defined. The agency goals were SMART.

**BUDGET**

**FUNDING REQUESTED**      **\$125,960.00**

**Match Funds:**      **\$109,885.00**

**In-kind Funds:**      **\$62,351.20**

**Total Project Costs:**      **\$330,827.00**

**Financial Comments:** Project180's President dedicating \$1,200 in leverage is also the managing agent for Hollybrook that is certifying the match. Other declared leverage sources could not be verified based upon the documentation provided. Budget as presented does not appear reasonable. Several significant line items are undocumented, so the reviewer could not make a proper evaluation as to whether it was appropriate or reasonable. Comparative financial statements were not provided so (g) could not be calculated.

**Programmatic Score:** 54

**Financial Score:** 17

**Total Score:** 71

**Amount Recommended:** \$0.00

<b>Previous Year's Funding:</b>	<b>2011-2012</b>	<b>2012-2013</b>	<b>2013-2014</b>
	N/A	N/A	N/A

**HOUSING & COMMUNITY DEVELOPMENT DIVISION  
2014 – 2015 UNIVERSAL APPLICATION FUNDING REQUEST**

**FACT SHEET**

**Project Title:** Priority 2: Hollybrook Enrichment Center Youth Enhancement Program

**Activity Type:** Public Service

**Agency:** Hollybrook Homes, Inc.

**Contact Person:** Lynn Griffin, Sr., Registered Agent, Director

**Contact E-Mail:** consultcato@msn.com

**Address:** 104 King Street

**Phone Number:** 904-389-1196

**Fax Number:**

**Funding Source:** CDBG      **# of People/Units to be served:** 100 People

**Project Description:** Funds will be used to provide access to programs and services that improve employment readiness and build self-esteem in approximately 100 youth.

**Comments:** Threshold not met. No detail budget or resolution was included in this application. The sources of revenue does not match the project expenditures total as noted on budget.

**BUDGET**

<b><u>FUNDING REQUESTED</u></b>	<b>\$76,000.00</b>
<b>Match Funds:</b>	<b>\$38,000.00</b>
<b>In-kind Funds:</b>	<b>\$42,000.00</b>
<b>Total Project Costs:</b>	<b>\$156,800.00</b>

**Financial Comments:** Agency did not include Detailed Budget Form. Review Terminated. Threshold not met.

**Programmatic Score:** 0      **Financial Score:** 0      **Total Score:** 0

**Amount Recommended:** \$0.00

<b>Previous Year's Funding:</b>	<b>2011-2012</b>	<b>2012-2013</b>	<b>2013-2014</b>
	N/A	N/A	N/A

**HOUSING & COMMUNITY DEVELOPMENT DIVISION  
2014 – 2015 UNIVERSAL APPLICATION FUNDING REQUEST**

**FACT SHEET**

**Project Title:** Priority 1: Family Self-Sufficiency

**Activity Type:** Public Service

**Agency:** Jacksonville Housing Authority

**Contact Person:** Joyce Quaintance Couch, VP of Resident Services

**Contact E-Mail:** jcouch@jaxha.org

**Address:** 1085 Golfair Blvd.

**Phone Number:** 904-366-6091

**Fax Number:** 904-366-6410

**Funding Source:** CDBG      **# of People/Units to be served:** 250 People

**Project Description:** Funds will be used for direct personnel services and operating cost to assist 250 low to moderate income Section 8 and public housing families to establish measurable and achievable goals in employment, job skills training and to become an entrepreneur or homeowner.

**Comments:** The agency provided a very detailed and concise background of administering grant funds and reference their internal financial software system. The implementation schedule is relevant and goals are SMART.

**BUDGET**

<b><u>FUNDING REQUESTED</u></b>	<b>\$25,000.00</b>
<b>Match Funds:</b>	<b>\$201,251.99</b>
<b>In-kind Funds:</b>	<b>\$0.00</b>
<b>Total Project Costs:</b>	<b>\$226,251.99</b>

**Financial Comments:** Match documented by letter from President/CEO. Full financial statements not included, so (b) and (c) could not be calculated. This application did not contain the full audit.

**Programmatic Score:** 53      **Financial Score:** 27      **Total Score:** 80

**Amount Recommended:** \$21,250.00

<b>Previous Year's Funding:</b>	<b>2011-2012</b>	<b>2012-2013</b>	<b>2013-2014</b>
	\$22,750.00	\$21,613.00	\$21,613.00

**HOUSING & COMMUNITY DEVELOPMENT DIVISION  
2014 – 2015 UNIVERSAL APPLICATION FUNDING REQUEST**

**FACT SHEET**

**Project Title:** Priority 2: Brentwood Lakes Neighborhood Network Center

**Activity Type:** Public Service

**Agency:** Jacksonville Housing Authority

**Contact Person:** Joyce Quaintance Couch, VP of Resident Services

**Contact E-Mail:** jcouch@jaxha.org

**Address:** 1300 Broad Street

**Phone Number:** 904-366-6091

**Fax Number:** 904-366-6410

**Funding Source:** CDBG      **# of People/Units to be served:** 300 People

**Project Description:** Funds will be used for direct personnel services and operating cost to provide the Brentwood Lake Neighborhood with a computer literacy and job training program to 300 assist public housing and Section 8 participants.

**Comments:** The agency provided a very detailed and concise background of administering grant funds and reference their internal financial software system. The implementation schedule is relevant and goals are SMART.

**BUDGET**

<b><u>FUNDING REQUESTED</u></b>	<b>\$25,000.00</b>
<b>Match Funds:</b>	<b>\$90,452.36</b>
<b>In-kind Funds:</b>	<b>\$5,000.00</b>
<b>Total Project Costs:</b>	<b>\$120,452.36</b>

**Financial Comments:** Match documented by letter from President/CEO. Volunteer Hours Brentwood Park Resident Management. Agency intends to purchase 4 computers at a total cost of \$21,000, of which \$6,000 is being allocated to the grant. There is no documentation regarding the method of determining the proposed cost. While computers would be an appropriate use of these funds, the cost is not reasonable based upon the information contained in the application. Full financial statements not included, so (b) and (c) could not be calculated. This application did not contain the full audit.

**Programmatic Score:** 54      **Financial Score:** 20      **Total Score:** 74

**Amount Recommended:** \$18,750.00

<b>Previous Year's Funding:</b>	<b>2011-2012</b>	<b>2012-2013</b>	<b>2013-2014</b>
	\$22,750.00	\$21,613.00	\$21,613.00

Revised: July 17, 2014

**HOUSING & COMMUNITY DEVELOPMENT DIVISION  
2014 – 2015 UNIVERSAL APPLICATION FUNDING REQUEST**

**FACT SHEET**

**Project Title:** Rainbow Workshop and Day Program

**Activity Type:** Public Service

**Agency:** L'Arche Harbor House, Inc.

**Contact Person:** Karla Smith, Office Manager

**Contact E-Mail:** karla@larchejacksonville.org

**Address:** 700 Arlington Road North

**Phone Number:** 904-721-5992

**Fax Number:** 904-721-7143

**Funding Source:** CDBG      **# of People/Units to be served:** 20 People

**Project Description:** Funds will be used for personnel services and operating expenditures to provide an environment of personal growth for 20 individuals living with intellectual and physical disabilities who have been unable to fit into other work programs.

**Comments:** Threshold not met. No signed resolution by the board included.

**BUDGET**

<b><u>FUNDING REQUESTED</u></b>	<b>\$58,650.00</b>
<b>Match Funds:</b>	<b>\$8,500.00</b>
<b>In-kind Funds:</b>	<b>\$89,799.84</b>
<b>Total Project Costs:</b>	<b>\$216,394.12</b>

**Financial Comments:** Agency did not document match. Agency did not document leverage. Agency did not properly document the breakdown of how the proposed costs were calculated. Narrative form contains no computations or amounts. Due to lack of documentation, reviewer had to deem budget incomplete and unable to be reviewed. Management letter comments regarding fund raising, segregation of duties and internal controls. Agency's response is adequate.

**Programmatic Score:** 0      **Financial Score:** 0      **Total Score:** 0

**Amount Recommended:** \$0.00

<b>Previous Year's Funding:</b>	<b>2011-2012</b>	<b>2012-2013</b>	<b>2013-2014</b>
	N/A	N/A	N/A

**HOUSING & COMMUNITY DEVELOPMENT DIVISION  
2014 – 2015 UNIVERSAL APPLICATION FUNDING REQUEST**

**FACT SHEET**

**Project Title:** JAX READS

**Activity Type:** Public Service

**Agency:** Learn To Read, Inc.

**Contact Person:** Judy Bradshaw, Executive Director

**Contact E-Mail:** judybltr@gmail.com

**Address:** 303 N. Laura Street

**Phone Number:** 904-630-1238

**Fax Number:** 904-630-7162

**Funding Source:** CDBG      **# of People/Units to be served:** 300 People

**Project Description:** Funds will be used for 43% of salary, wages and benefits for the Literacy Program Manager and operating expenditures to provide direct reading, language, basic math and life skills instruction to 300+ adults age 18 and older who read below sixth grade level.

**Comments:** The agency clearly described the community need with relevant plans and studies. The implementation schedule is realistic and goals are SMART.

**BUDGET**

<b><u>FUNDING REQUESTED</u></b>	<b>\$30,000.00</b>
<b>Match Funds:</b>	<b>\$57,382.50</b>
<b>In-kind Funds:</b>	<b>\$41,623.00</b>
<b>Total Project Costs:</b>	<b>\$129,005.50</b>

**Financial Comments:** Management letter comments relating to control of inventory, contribution listing and valuation and segregation of duties. Agency response adequate.

<b>Programmatic Score:</b> <u>55</u>	<b>Financial Score:</b> <u>30</u>	<b>Total Score:</b> <u>85</u>
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**Amount Recommended:** \$24,000.00

<b>Previous Year's Funding:</b>	<b>2011-2012</b>	<b>2012-2013</b>	<b>2013-2014</b>
	N/A	N/A	N/A

**HOUSING & COMMUNITY DEVELOPMENT DIVISION  
2014 – 2015 UNIVERSAL APPLICATION FUNDING REQUEST**

**FACT SHEET**

**Project Title:** Priority 4: NJCDC Community Resource Center

**Activity Type:** Public Service

**Agency:** Northwest Jacksonville CDC

**Contact Person:** Paul Tutwiler, Executive Director

**Contact E-Mail:** ptutwiler2003@yahoo.com

**Address:** 3416 Moncrief Road, Suite 200

**Phone Number:** 904-598-9196

**Fax Number:** 904-598-9197

**Funding Source:** CDBG      **# of People/Units to be served:** 500 People

**Project Description:** Funds will be used for salaries, wages and benefits at 63% for one (1) Program Manager and 40% each for two (2) Community Organizers and administrative operating expenditures to provide a central focal point for 500 neighborhood residents that live (homeownership and rental), work (economic opportunities) and have access to social services through the resource center and epic programs.

**Comments:** Threshold not met. No budget summary included.

**BUDGET**

**FUNDING REQUESTED**      **\$100,000.00**

**Match Funds:**      **\$125,000.00**

**In-kind Funds:**

**Total Project Costs:**      **\$210,000.00**

**Financial Comments:** Match: Agency declared match from four (4) external sources. External sources cannot be used to meet match requirements. Additionally, there was no board resolution or letter confirming the set aside of the declared match funds. The external and internal sources were declared in the agency's P1 application and cannot be used twice. The budget line items are not documented as to the method of computation and are inadequately described in the budget narrative section. As such, the reviewer was unable to score the appropriateness or reasonableness of the proposed project budget. No quotes for items that require competitive procurement. Budget Summary Form Missing - Required Element - Failure to Meet Threshold.

**Programmatic Score:** 0

**Financial Score:** 0

**Total Score:** 0

**Amount Recommended:** \$0.00

<b>Previous Year's Funding:</b>	<b>2011-2012</b>	<b>2012-2013</b>	<b>2013-2014</b>
	N/A	\$21,613.00	\$21,613.00

Revised: July 17, 2014

**HOUSING & COMMUNITY DEVELOPMENT DIVISION  
2014 – 2015 UNIVERSAL APPLICATION FUNDING REQUEST**

**FACT SHEET**

**Project Title:** Community Employment Initiative

**Activity Type:** Public Service

**Agency:** Pine Castle, Inc.

**Contact Person:** Randall Duncan, Associate Executive Director

**Contact E-Mail:** rduncan@pinecastle.org

**Address:** 4911 Spring Park Road

**Phone Number:** 904-733-2650 x238

**Fax Number:** 904-733-2681

**Funding Source:** CDBG      **# of People/Units to be served:** 20 People

**Project Description:** Funds will be used for direct client personnel services to solicit employers to hire 20 individuals with disabilities.

**Comments:** The agency displays track record administering grant funds in the community and clearly describe the need of developmental disabilities person with local stats. The agency provided a clear and concise project description. The implementation schedule is realistic and goals are SMART.

**BUDGET**

**FUNDING REQUESTED**      **\$30,043.14**

**Match Funds:**      **\$124,023.51**

**In-kind Funds:**

**Total Project Costs:**      **\$273,066.65**

**Financial Comments:** Match letter refers to signed board resolution that was not attached. Without the board resolution, the documentation for the match is inadequate. Leverage with State funding. Management letter comments regarding drug and alcohol screening projects and segregation of duties. Agency response is adequate.

**Programmatic Score:** 51      **Financial Score:** 33      **Total Score:** 84

**Amount Recommended:** \$24,034.00

<b>Previous Year's Funding:</b>	<b>2011-2012</b>	<b>2012-2013</b>	<b>2013-2014</b>
	N/A	\$29,868.00	\$29,868.00



**HOUSING & COMMUNITY DEVELOPMENT DIVISION  
2014 – 2015 UNIVERSAL APPLICATION FUNDING REQUEST**

**FACT SHEET**

**Project Title:** Professional Opportunities Program for Students, Inc. (POPS)

**Activity Type:** Public Service

**Agency:** Professional Opportunities Program for Students, Inc. (POPS)

**Contact Person:** Wanda Graham, District Manager

**Contact E-Mail:** wanda.graham@popsinc.org

**Address:** 3701 Winton Drive

**Phone Number:** 904-924-3092

**Fax Number:** 904-924-3154

**Funding Source:** CDBG      **# of People/Units to be served:** 23 People

**Project Description:** Funds will be used for personnel services and operating expenditures (including internship stipends) for 23 youth interns.

**Comments:** The agency provides details of track record in the community with key staff with professional expertise. The agency clearly describes the need for life skills training associated with this program and documents the need with local statistics. The agency provide an comprehensive project description for a newly funded service with realistic implementation schedule and SMART goals.

**BUDGET**

**FUNDING REQUESTED**      **\$30,000.00**

**Match Funds:**      **\$15,000.00**

**In-kind Funds:**      **\$37,700.00**

**Total Project Costs:**      **\$82,700.00**

**Financial Comments:** Match documented by letter from board.

**Programmatic Score:** 52      **Financial Score:** 30      **Total Score:** 82

**Amount Recommended:** \$18,810.00

<b>Previous Year's Funding:</b>	<b>2011-2012</b>	<b>2012-2013</b>	<b>2013-2014</b>
	N/A	N/A	N/A

**HOUSING & COMMUNITY DEVELOPMENT DIVISION  
2014 – 2015 UNIVERSAL APPLICATION FUNDING REQUEST**

**FACT SHEET**

**Project Title:** Family Campaign

**Activity Type:** Public Service

**Agency:** Take Flight & Soar Community Project, Inc.

**Contact Person:** Sabrenna C. Chambliss, Chief Executive Officer/Director

**Contact E-Mail:** takeflightsoar2012@yahoo.com

**Address:** 1038-5 Dunn Avenue, Suite 85

**Phone Number:** 904-405-8029

**Fax Number:** 206-278-6710

**Funding Source:** CDBG      **# of People/Units to be served:** 400 People

**Project Description:** Funds will be used for direct client personnel services and operating expenditures to provide family enrichment activities and skills training to 400 people.

**Comments:** Threshold not met. Application not signed by certifying representative. No signed resolution by the board president included. Agency did not include organization by-laws, financial statement and/or balance sheet. No audit included.

**BUDGET**

<b><u>FUNDING REQUESTED</u></b>	<b>\$38,229.51</b>
<b>Match Funds:</b>	<b>\$19,114.75</b>
<b>In-kind Funds:</b>	<b>\$19,114.75</b>
<b>Total Project Costs:</b>	<b>\$378,374.68</b>

**Financial Comments:** Agency did not include an audit or any current year financial information.

**Programmatic Score:** 0      **Financial Score:** 0      **Total Score:** 0

**Amount Recommended:** \$0.00

<b>Previous Year's Funding:</b>	<b>2011-2012</b>	<b>2012-2013</b>	<b>2013-2014</b>
	N/A	N/A	N/A

**HOUSING & COMMUNITY DEVELOPMENT DIVISION  
2014 – 2015 UNIVERSAL APPLICATION FUNDING REQUEST**

**FACT SHEET**

**Project Title:** Mentoring for Life

**Activity Type:** Public Service

**Agency:** Wayman Community Development Corp.

**Contact Person:** Mark L. Griffin, Board Chairman

**Contact E-Mail:**

**Address:** 1176 Labelle Street

**Phone Number:** 904-693-1503

**Fax Number:** 904-693-1127

**Funding Source:** CDBG      **# of People/Units to be served:** 150 People

**Project Description:** Funds will be used for direct client personnel services and operating expenditures to provide mentoring and counseling services to 150 at-risk youth to make positive life choices and provide stronger family values.

**Comments:** Threshold not met. No signed resolution by the board president included.

**BUDGET**

<b><u>FUNDING REQUESTED</u></b>	<b>\$50,000.00</b>
<b>Match Funds:</b>	<b>\$33,334.00</b>
<b>In-kind Funds:</b>	<b>\$16,666.00</b>
<b>Total Project Costs:</b>	<b>\$100,000.00</b>

**Financial Comments:**

**Programmatic Score:** 0      **Financial Score:** 0      **Total Score:** 0

**Amount Recommended:** \$0.00

<b>Previous Year's Funding:</b>	<b>2011-2012</b>	<b>2012-2013</b>	<b>2013-2014</b>
	N/A	N/A	N/A

**HOUSING & COMMUNITY DEVELOPMENT DIVISION  
2014 – 2015 UNIVERSAL APPLICATION FUNDING REQUEST**

**FACT SHEET**

**Project Title:** Mental Health Counseling

**Activity Type:** Public Service

**Agency:** Women's Center of Jacksonville

**Contact Person:** Shirley K. Webb, Executive Director

**Contact E-Mail:** swebb@womenscenterofjax.org

**Address:** 5644 Colcord Avenue

**Phone Number:** 904-722-3000

**Fax Number:** 904-722-3100

**Funding Source:** CDBG      **# of People/Units to be served:** 100 People

**Project Description:** Funds will be used for direct client personnel services to provide mental health counseling services to 100 clients.

**Comments:** The agency provided a comprehensive history of the agency along with detailed information and provided a clear and concise statement of need with documented by local and current statistics. The implementation schedule provided is realistic and goals are SMART.

**BUDGET**

**FUNDING REQUESTED**      **\$33,554.00**

**Match Funds:**      **\$129,225.00**

**In-kind Funds:**      **\$12,797.00**

**Total Project Costs:**      **\$175,576.00**

**Financial Comments:** Agency match is undocumented.

**Programmatic Score:** 57      **Financial Score:** 30      **Total Score:** 87

**Amount Recommended:** \$28,520.00

<b>Previous Year's Funding:</b>	<b>2011-2012</b>	<b>2012-2013</b>	<b>2013-2014</b>
	N/A	N/A	N/A

# 2014-15 UNIVERSAL APPLICATION EMERGENCY SOLUTIONS GRANT (ESG)

## PROGRAM OVERVIEW

**\$461,109 Entitlement**

**\$135,878.28 Reprogrammed Funds '12-13 FY**

Eligibility Category	# of Agencies Requesting Funding	Amount Requested	# of Agencies Passed Scoring Min. 70	# of Agencies Awarded Funds	Amount Awarded	Percent of funds awarded
Homeless Prevention	2	\$262,125.00	2	2	\$181,776	39%
Homeless Shelter	2	\$464,746.85	2	2	\$138,342.00-EN <b>\$135,878.28-RF</b>	44%
Data Collection & Analysis	1	\$50,000.00	1	1	\$46,500.00	10%
Administration-7% Max	In-house	\$32,278.00	N/A	N/A	\$32,278.00	7%
Total ESG Funds	5	\$809,150	5	5	\$596,987.28	100%

**HOUSING & COMMUNITY DEVELOPMENT DIVISION  
2014 – 2015 UNIVERSAL APPLICATION FUNDING REQUEST**

**FACT SHEET**

**Project Title:** Case Management Emergency Financial Assistance Program

**Activity Type:** Emergency Solutions Grant

**Agency:** Catholic Charities Bureau, Inc. Jacksonville Regional Office

**Contact Person:** Jennifer Garizio, Executive Director

**Contact E-Mail:** jgarizio@ccbjax.org

**Address:** 134 E. Church Street

**Phone Number:** 904-354-4846 x246

**Fax Number:** 904-224-0092

**Funding Source:** ESG      **# of People/Units to be served:** 302 People

**Project Description:** Funds will be used for 5% of salaries, wages and benefits for the Director of Emergency Services and Quality Assurance Manager and for emergency assistance for rent and utilities to prevent homelessness, in addition to wages and case management for 302 households.

**Comments:** The agency tracking and reporting systems are in place and function well. Minimal technical assistance need for grant administration and internal controls are identified. The statement of need is clearly described. Agency accessed four (4) studies with three (3) of the local to Jacksonville. Target population and service delivery area clearly identified and urgency is addressed. Project staff was clearly identified with job responsibilities included for each. Agency provided an good implementation schedule with SMART goals and objectives. Included multiple letters of support.

**BUDGET**

**FUNDING REQUESTED**      **\$200,000.00**

**Match Funds:**      **\$325,517.12**

**In-kind Funds:**      **\$75,200.00**

**Total Project Costs:**      **\$600,717.12**

**Financial Comments:** Agency declared and documented match properly. Agency declared and documented multiple forms of leverage. Budget is adequately documented for line items in proposed project. Amounts appear to be both appropriate and reasonable. Audit due 10/31/13, received 10/31/13. Several minor management letter comments. The agency's response and planned mitigating actions appear adequate.

**Programmatic Score:** 55

**Financial Score:** 33

**Total Score:** 88

**Amount Recommended:** \$120,000.00

<b>Previous Year's Funding:</b>	<b>2011-2012</b>	<b>2012-2013</b>	<b>2013-2014</b>
	\$50,000.00	N/A	N/A

Revised: July 17, 2014

**HOUSING & COMMUNITY DEVELOPMENT DIVISION  
2014 – 2015 UNIVERSAL APPLICATION FUNDING REQUEST**

**FACT SHEET**

**Project Title:** P2: Jacksonville Day Resource Center

**Activity Type:** Emergency Solutions Grant

**Agency:** Emergency Services & Homeless Coalition of Jacksonville, Inc.

**Contact Person:** Dawn Gilman, Chief Executive Officer

**Contact E-Mail:** dgilman@eshcnet.org

**Address:** 562 Park Street

**Phone Number:** 904-354-1100

**Fax Number:** 866-371-8637

**Funding Source:** ESG

**# of People/Units to be served:** 1,500 People

**Project Description:** Funds will be used for 19% of salary, wages and benefits for an Executive Assistant and to help defray the operating costs of the Jacksonville Day Resource Center to provide support services to approximately 1,500 of the homeless population of downtown Jacksonville

**Comments:** The agency key staff has required expertise however, the agency did not describe the services of the center. In addition, the implementation schedule and goals were weak.

**BUDGET**

**FUNDING REQUESTED** **\$166,966.85**

**Match Funds:** **\$91,787.00**

**In-kind Funds:** **\$200,991.00**

**Total Project Costs:** **\$524,744.85**

**Financial Comments:** The agency's declared match funding is not properly documented, therefore no points were given. The budgeted operating expenses are undocumented. The reviewer could not determine how amounts were projected.

**Programmatic Score:** 44

**Financial Score:** 26

**Total Score:** 70

**Amount Recommended:** \$59,498.00

<b>Previous Year's Funding:</b>	<b>2011-2012</b>	<b>2012-2013</b>	<b>2013-2014</b>
	N/A	N/A	N/A

**HOUSING & COMMUNITY DEVELOPMENT DIVISION  
2014 – 2015 UNIVERSAL APPLICATION FUNDING REQUEST**

**FACT SHEET**

**Project Title:** P1: ESG Data Collection and Analysis

**Activity Type:** Emergency Solutions Grant

**Agency:** Emergency Services & Homeless Coalition of Jacksonville, Inc.

**Contact Person:** Dawn Gilman, Chief Executive Officer

**Contact E-Mail:** dgilman@eshcnet.org

**Address:** 562 Park Street

**Phone Number:** 904-354-1100

**Fax Number:** 866-371-8637

**Funding Source:** ESG      **# of People/Units to be served:** 200 People

**Project Description:** Funds will be used for wages and salaries and professional services in the administration of the HMIS system for 200 people.

**Comments:** The agency described the need and targeted population were comprehensive. The implementation schedule and goals were SMART and agency collaborated with multiple agencies.

**BUDGET**

<b><u>FUNDING REQUESTED</u></b>	<b>\$50,000.00</b>
<b>Match Funds:</b>	<b>\$146,950.00</b>
<b>In-kind Funds:</b>	<b>\$52,732.00</b>
<b>Total Project Costs:</b>	<b>\$249,682.00</b>

**Financial Comments:** The agency's declared match funding is not properly documented, therefore no points were given. The budgeted fringe benefits appear to apply to more than just the position being funded.

**Programmatic Score:** 52      **Financial Score:** 26      **Total Score:** 78

**Amount Recommended:** \$46,500.00

<b>Previous Year's Funding:</b>	<b>2011-2012</b>	<b>2012-2013</b>	<b>2013-2014</b>
	N/A	N/A	N/A



**HOUSING & COMMUNITY DEVELOPMENT DIVISION  
2014 – 2015 UNIVERSAL APPLICATION FUNDING REQUEST**

**FACT SHEET**

**Project Title:** Emergency Shelter and Recovery Services for the Homeless

**Activity Type:** Emergency Solutions Grant

**Agency:** I.M. Sulzbacher Center for the Homeless, Inc.

**Contact Person:** Carlton Higginbotham, Grant & Contract Coordinator

**Contact E-Mail:** carltonhigginbotham@tscjax.org

**Address:** 611 East Adams Street

**Phone Number:** 904-394-8096

**Fax Number:** 904-354-4347

**Funding Source:** ESG      **# of People/Units to be served:** 1,500 People

**Project Description:** Funds will be used to defray operating costs of the I.M. Sulzbacher Center for the homeless and for wages and salaries of Case Managers to assist 1,500 individuals with supportive services.

**Comments:** The agency provided clear documentation of need with relevant statistics and population and targeted area including urgency outlined. The implementation schedule is reasonable and goals are SMART.

**BUDGET**

<b><u>FUNDING REQUESTED</u></b>	<b>\$297,780.00</b>
<b>Match Funds:</b>	<b>\$2,024,157.00</b>
<b>In-kind Funds:</b>	<b>\$306,000.00</b>
<b>Total Project Costs:</b>	<b>\$2,687,937.00</b>

**Financial Comments:** Budget narrative form does not break out allocation of case manager salaries into units and amount per unit. Amounts on budget narrative form are unsupported by any backup documentation as to projected cost.

**Programmatic Score:** 59      **Financial Score:** 26      **Total Score:** 85

**Amount Recommended:** \$276,935.28

<b>Previous Year's Funding:</b>	<b>2011-2012</b>	<b>2012-2013</b>	<b>2013-2014</b>
	\$246,622.00	\$397,780.00	\$397,780.00

**HOUSING & COMMUNITY DEVELOPMENT DIVISION  
2014 – 2015 UNIVERSAL APPLICATION FUNDING REQUEST**

**FACT SHEET**

**Project Title:** Services to Homeless Persons

**Activity Type:** Emergency Solutions Grant

**Agency:** Salvation Army (The)

**Contact Person:** Major H. Dean Hinson, Northeast Florida Area Commander

**Contact E-Mail:** dean\_hinson@uss.salvationarmy.org

**Address:** 328 N. Ocean Street

**Phone Number:** 904-301-4850

**Fax Number:** 904-366-9238

**Funding Source:** ESG      **# of People/Units to be served:** 1,250 People

**Project Description:** Funds will be used for emergency assistance for food, rent and utilities for 1,250 individuals to prevent homelessness, in addition to wages for case management.

**Comments:** The agency provided a comprehensive history of the agency along with detailed information and provided a clear and concise project description. The implementation schedule provided is realistic and goals are SMART.

**BUDGET**

<b><u>FUNDING REQUESTED</u></b>	<b>\$62,125.00</b>
<b>Match Funds:</b>	<b>\$445,849.34</b>
<b>In-kind Funds:</b>	<b>\$146,240.24</b>
<b>Total Project Costs:</b>	<b>\$654,214.58</b>

**Financial Comments:** Agency documented in kind match. Cash match is dedicated from future revenue streams. Audit identified significant deficiency related to inter-agency payable/receivables. Agency response is adequate.

**Programmatic Score:** 59      **Financial Score:** 27      **Total Score:** 86

**Amount Recommended:** \$61,776.00

<b>Previous Year's Funding:</b>	<b>2011-2012</b>	<b>2012-2013</b>	<b>2013-2014</b>
	N/A	\$163,400.00	\$163,400.00

# 2014-15 UNIVERSAL APPLICATION

## HOME INVESTMENT PARTNERSHIP PROGRAM

### (HOME) PROGRAM OVERVIEW

### \$2,256,024 Entitlement

Eligibility Category	# of Agencies Requesting Funding	Amount Requested	# of Agencies Passed Scoring Min. 70	# of Agencies Awarded Funds	Amount Awarded	Percent of funds awarded
CHDO-Operating-5% Max 1)Operation New Hope	3	\$188,825.00	2	1	\$62,801.20-Operating Pool \$50,000.00-Operation New Hope \$112,801.20-Total	5%
CHDO Development-15% Min	0	\$0.00	0	0	\$338,403.60	15%
Homeownership						
Downpayment Assistance	In-house	\$579,217.20	N/A	N/A	\$579,217.20	26%
Neighborhood Revitalization Strategy Area (NRSA)	In-house	N/A	N/A	N/A	\$1,000,000.00	44%
Owner—occupied Rehabilitation	1	\$527,670.00	0	0	\$0.00	0%
Administration-10% Max	In-house	\$225,602.00	N/A	N/A	\$225,602.00	10%
Total HOME Funds	4	\$1,521,314.20	3	3	\$2,256,024.00	100%

**HOUSING & COMMUNITY DEVELOPMENT DIVISION  
2014 – 2015 UNIVERSAL APPLICATION FUNDING REQUEST**

**FACT SHEET**

**Project Title:** Priority 1: CHDO Operating Subsidy

**Activity Type:** CHDO Operating

**Agency:** Metro North CDC

**Contact Person:** Reggie Fullwood, Executive Director

**Contact E-Mail:** rfullwood@metronorthcdc.com

**Address:** 3103 N. Main Street

**Phone Number:** 904-358-1224

**Fax Number:** 904-358-1225

**Funding Source:** HOME      **# of People/Units to be served:** 4,000 People

**Project Description:** Funds will be used for salaries, wages and benefits at 39% for one (1) Housing Coordinator, 48% for one (1) Planning Coordinator and 33% for one (1) Finance Manager to provide general operating assistance to Community Housing Development Organization's for reasonable and customary operating expenses that will impact approximately 4,000 people.

**Comments:** Threshold not met. No Budget Summary.

**BUDGET**

<b><u>FUNDING REQUESTED</u></b>	<b>\$53,825.00</b>
<b>Match Funds:</b>	<b>\$392,125.00</b>
<b>In-kind Funds:</b>	<b>\$0.00</b>
<b>Total Project Costs:</b>	<b>\$445,950.00</b>

**Financial Comments:** Agency failed to include required Budget Summary Form. Threshold not met.

<b>Programmatic Score:</b> <u>0</u>	<b>Financial Score:</b> <u>0</u>	<b>Total Score:</b> <u>0</u>
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**Amount Recommended:** \$0.00

<b>Previous Year's Funding:</b>	<b>2011-2012</b>	<b>2012-2013</b>	<b>2013-2014</b>
	\$12,000.00	N/A	N/A

**HOUSING & COMMUNITY DEVELOPMENT DIVISION  
2014 – 2015 UNIVERSAL APPLICATION FUNDING REQUEST**

**FACT SHEET**

**Project Title:** Priority 2: CHDO Operating Subsidy

**Activity Type:** CHDO Operating

**Agency:** Northwest Jacksonville CDC

**Contact Person:** Paul Tutwiler, Executive Director

**Contact E-Mail:** ptutwiler2003@yahoo.com

**Address:** 3416 Moncrief Road, Suite 200

**Phone Number:** 904-598-9196

**Fax Number:** 904-598-9197

**Funding Source:** HOME      **# of People/Units to be served:** 4,000 People

**Project Description:** Funds will be used to provide general operating assistance to Community Housing Development Organization's for reasonable and customary operating expenses that will impact approximately 4,000 people.

**Comments:** The agency key staff has professional expertise administering grant funds. The statement of need is broad and narrative is vague and does not detail the need for operating subsidy.

**BUDGET**

<b><u>FUNDING REQUESTED</u></b>	<b>\$50,000.00</b>
<b>Match Funds:</b>	<b>\$75,000.00</b>
<b>In-kind Funds:</b>	<b>\$0.00</b>
<b>Total Project Costs:</b>	<b>\$125,000.00</b>

**Financial Comments:** Match: Agency declared match from four (4) external sources. External sources cannot be used to meet match requirements. Additionally, there was no board resolution or letter confirming the set aside of the declared match funds. Leverage: Agency declared leverage from three (3) external sources and one (1) internal cash flow source. Two (2) of the sources were lines of credit which, as debt, cannot be used as leverage. The internal source was declared in the agency's P1 application and cannot be used twice. Agency was given credit for the one (1) remaining external source. The budget line items are not documented as to the method of computation and are inadequately described in the budget narrative section. As such, the reviewer was unable to score the appropriateness or reasonableness of the proposed budget. No quotes for items that require competitive procurement. Division still awaiting agency's audit submission that was due on January 31, 2014 as of most recent May 2, 2014 follow-up. Management letter comments related to the small size of the organization.

**Programmatic Score:** 47      **Financial Score:** 15      **Total Score:** 62

**Amount Recommended:** \$0.00

<b>Previous Year's Funding:</b>	<b>2011-2012</b>	<b>2012-2013</b>	<b>2013-2014</b>
	\$35,000.00	\$31,401.00	\$31,401.00

Revised: July 17, 2014

**HOUSING & COMMUNITY DEVELOPMENT DIVISION  
2014 – 2015 UNIVERSAL APPLICATION FUNDING REQUEST**

**FACT SHEET**

**Project Title:** CHDO Operating Subsidy

**Activity Type:** CHDO Operating

**Agency:** Operation New Hope

**Contact Person:** Robert Ownby, Housing Rehab Program Manager

**Contact E-Mail:** rownby@operationnewhope.com

**Address:** 1830 N. Main Street

**Phone Number:** 904-354-4673

**Fax Number:** 904-407-3729

**Funding Source:** HOME      **# of People/Units to be served:** 75 People

**Project Description:** Funds will be used to provide general operating assistance to Community Housing Development Organization's for reasonable and customary operating expenses that will impact approximately 75 people.

**Comments:** The agency has extensive background in housing programs. The statement of need were clear and concise and the implementation schedule is only relating to the construction of homes and not the services being provided.

**BUDGET**

**FUNDING REQUESTED**      **\$85,000.00**

**Match Funds:**      **\$109,023.00**

**In-kind Funds:**

**Total Project Costs:**      **\$194,023.00**

**Financial Comments:** Agency match was not properly documented by letter or resolution from agency board. Management letter comments related to the small size of the organization.

**Programmatic Score:** 54      **Financial Score:** 26      **Total Score:** 80

**Amount Recommended:** \$50,000.00

<b>Previous Year's Funding:</b>	<b>2011-2012</b>	<b>2012-2013</b>	<b>2013-2014</b>
	\$35,000.00	\$30,000.00	\$30,000.00

**HOUSING & COMMUNITY DEVELOPMENT DIVISION  
2014 – 2015 UNIVERSAL APPLICATION FUNDING REQUEST**

**FACT SHEET**

**Project Title:** Priority 1: Owner Occupied Rehabilitation - New Town

**Activity Type:** Housing Rehabilitation

**Agency:** Habitat for Humanity of Jacksonville, Inc. (Habijax)

**Contact Person:** Angela Leatherbury, VP of Organizational Planning & Operations

**Contact E-Mail:** aleatherbury@habijax.org

**Address:** 2404 Hubbard Street

**Phone Number:** 904-208-6664

**Fax Number:** 904-798-2728

**Funding Source:** HOME      **# of People/Units to be served:** 50 Households

**Project Description:** Funds will be used to rehabilitate 50 homes up to code standards, not to exceed \$25,000 for each low and moderate income homeowner in the New Town Success Zone. Exceptions to exceed this amount will be made on an as needed basis.

**Comments:** Threshold not met (AUDIT). This agency has been on the City Auditor's non-compliance list since 10/31/2006.

**BUDGET**

**FUNDING REQUESTED**      **\$527,670.00**

**Match Funds:**      **\$527,670.00**

**In-kind Funds:**      **\$0.00**

**Total Project Costs:**      **\$1,055,340.00**

**Financial Comments:** Agency on Chapter 118 non-compliance listing. Ineligible for award until cleared.

**Programmatic Score:** 0      **Financial Score:** 0      **Total Score:** 0

**Amount Recommended:** \$0.00

<b>Previous Year's Funding:</b>	<b>2011-2012</b>	<b>2012-2013</b>	<b>2013-2014</b>
	N/A	N/A	N/A

# 2014-15 UNIVERSAL APPLICATION HOUSING OPPORTUNITIES FOR PERSONS W/ AIDS (HOPWA) PROGRAM OVERVIEW

## \$2,303,001 Entitlement

### \$46,410.02-Reprogrammed Funds '12-13 FY

Eligibility Category	# of Agencies Requesting Funding	Amount Requested	# of Agencies Passed Scoring Min. 70	# of Agencies Awarded Funds	Amount Awarded	Percent of funds awarded
Short-term Rent, Mortgage & Utility Assistance	3	\$2,206,939.54	3	3	\$1,708,905.00	74%
Housing Placement	1	223,188.00	1	1	\$206,296.00	7%
Supportive Services (Mental Health & Drug Abuse Counseling)	3	632,278.25	3	3	\$365,120.02-EN \$46,410.02-RF	16%
Administration-3% Max	In-house	\$69,090.00	N/A	N/A	\$69,090.00	3%
Total HOPWA Funds	7	\$3,131,495.79	7	7	\$2,349,411.02	100%



**HOUSING & COMMUNITY DEVELOPMENT DIVISION  
2014 – 2015 UNIVERSAL APPLICATION FUNDING REQUEST**

**FACT SHEET**

**Project Title:** Housing Opportunities for Persons with AIDS

**Activity Type:** Housing Opportunities for Persons with AIDS

**Agency:** Catholic Charities Bureau, Inc. Jacksonville Regional Office

**Contact Person:** Jennifer Garizio, Executive Director

**Contact E-Mail:** jgarizio@ccbjax.org

**Address:** 134 E. Church Street

**Phone Number:** 904-354-4846 x246

**Fax Number:** 904-224-0092

**Funding Source:** HOPWA

**# of People/Units to be served:** 2,010 People

**Project Description:** Funds will be used for salaries, wages and benefits at 50% for one (1) Director of Finance, 40% for one (1) Director of Emergency Services, 50% for one (1) Quality Assurance Manager and 50% for one (1) EA Specialist to provide emergency assistance for rent and utilities to prevent homelessness, in addition to wages and case management for 2010 individuals.

**Comments:** The agency tracking and reporting systems are in place and function well. Minimal technical assistance need for grant administration and internal controls are identified. The statement of need is clearly described. Agency accessed four (4) studies with three (3) of the local to Jacksonville. Target population and service delivery area clearly identified and urgency is addressed. Project staff was clearly identified with job responsibilities included for each. Agency provided an good implementation schedule with SMART goals and objectives. Included multiple letters of support.

**BUDGET**

**FUNDING REQUESTED** **\$1,000,000.00**

**Match Funds:** **\$916,257.22**

**In-kind Funds:** **\$85,500.00**

**Total Project Costs:** **\$2,001,757.22**

**Financial Comments:** Agency declared and documented match properly. Agency declared and documented multiple forms of leverage. Some forms of leverage were scored in prior applications and were not included for this application. Budget is adequately documented for line items in proposed project. Amounts appear to be both appropriate and reasonable. Audit due 10/31/13, received 10/31/13. Several minor management letter comments. The agency's response and planned mitigating actions appear adequate.

**Programmatic Score:** 55

**Financial Score:** 28

**Total Score:** 83

**Amount Recommended:** \$930,000.00

**Previous Year's Funding:**

**2011-2012**

**2012-2013**

**2013-2014**

**\$1,004,956.95**

**\$1,005,418.00**

**\$1,005,418.00**

Revised: July 17, 2014

**HOUSING & COMMUNITY DEVELOPMENT DIVISION  
2014 – 2015 UNIVERSAL APPLICATION FUNDING REQUEST**

**FACT SHEET**

**Project Title:** HOPWA: Linking People to Housing

**Activity Type:** Housing Opportunities for Persons with AIDS

**Agency:** Gateway Community Services, Inc.

**Contact Person:** Karen Tozzi, VP of Development

**Contact E-Mail:** ktozzi@gatewaycommunity.com

**Address:** 555 Stockton Street

**Phone Number:** 904-387-4661 x1033

**Fax Number:** 904-384-5753

**Funding Source:** HOPWA

**# of People/Units to be served:** 50 People

**Project Description:** Funds will be used to provide housing and support services to 50 individuals living with AIDS who are in or seeking treatment and recovery for substance abuse.

**Comments:** The agency clearly provided the community problem with plans and studies. Goals and objectives are SMART.

**BUDGET**

<b><u>FUNDING REQUESTED</u></b>	<b>\$78,355.48</b>
<b>Match Funds:</b>	<b>\$366,261.00</b>
<b>In-kind Funds:</b>	<b>\$0.00</b>
<b>Total Project Costs:</b>	<b>\$444,616.48</b>

**Financial Comments:** Agency is requesting reimbursement for indirect costs. If awarded, finance needs to review final budget submission.

**Programmatic Score:** 53                      **Financial Score:** 32                      **Total Score:** 85

**Amount Recommended:** \$65,969.00

<b>Previous Year's Funding:</b>	<b>2011-2012</b>	<b>2012-2013</b>	<b>2013-2014</b>
	\$66,001.00	\$70,024.00	\$70,024.00

**HOUSING & COMMUNITY DEVELOPMENT DIVISION  
2014 – 2015 UNIVERSAL APPLICATION FUNDING REQUEST**

**FACT SHEET**

**Project Title:** HOPWA Housing Program

**Activity Type:** Housing Opportunities for Persons with AIDS

**Agency:** Lutheran Social Services

**Contact Person:** Heather Vaughan, Program Director

**Contact E-Mail:** hvaughan@lssjax.org

**Address:** 4615 Philips Highway

**Phone Number:** 904-739-7016

**Fax Number:** 904-737-3412

**Funding Source:** HOPWA

**# of People/Units to be served:** 300 People

**Project Description:** Funds will be used for salaries, wages and benefits for Indirect Costs of 7%, direct personnel services and operating expenses to assist 300 client with mortgage and rental assistance, client utility service assistance.

**Comments:** The agency clearly defined statement of need with relevant studies to Jacksonville and targeted population and urgency addressed.

**BUDGET**

**FUNDING REQUESTED** **\$508,117.54**

**Match Funds:** **\$776,775.00**

**In-kind Funds:** **\$61,600.00**

**Total Project Costs:** **\$1,013,464.97**

**Financial Comments:** No documented cash match. Ryan White (COJ) \$443,654 Leverage. Agency is requesting indirect cost reimbursement. Method of calculation is incorrect. If agency is funded, finance staff would need to review final budget submission. Agency did not provide any documentation to support calculations for line items.

**Programmatic Score:** 50

**Financial Score:** 23

**Total Score:** 73

**Amount Recommended:** \$132,271.00

**Previous Year's Funding:**

**2011-2012**

**2012-2013**

**2013-2014**

\$250,000.00

\$108,148.00

\$108,148.00

**HOUSING & COMMUNITY DEVELOPMENT DIVISION  
2014 – 2015 UNIVERSAL APPLICATION FUNDING REQUEST**

**FACT SHEET**

**Project Title:** Priority 1: Housing Opportunities for Persons with AIDS, Short-term Rent, Mortgage, and Utilities (STRMU)

**Activity Type:** Housing Opportunities for Persons with AIDS

**Agency:** Northeast Florida AIDS Network, Inc. (NFAN)

**Contact Person:** Donna M. Fuchs, Executive Director

**Contact E-Mail:** dfuchs@nfanjax.org

**Address:** 2715 Oak Street

**Phone Number:** 904-356-1612 x18

**Fax Number:** 904-356-7095

**Funding Source:** HOPWA

**# of People/Units to be served:** 400 People

**Project Description:** Funds will be used for 62% of salary, wages and benefits for the Executive Director and for direct client supportive services of short-term rent, mortgage and utility assistance along with case management for 400 clients with HIV/AIDS.

**Comments:** The agency has a track record in the community and provided detailed statement of need with statistic relevant to Jacksonville. The implementation schedule and goals are SMART.

**BUDGET**

**FUNDING REQUESTED** **\$698,822.00**

**Match Funds:** **\$1,142,484.00**

**In-kind Funds:** **\$0.00**

**Total Project Costs:** **\$1,841,306.00**

**Financial Comments:** Agency declared match is all external and is scored as leverage.

**Programmatic Score:** 56

**Financial Score:** 30

**Total Score:** 86

**Amount Recommended:** \$646,634.00

<b>Previous Year's Funding:</b>	<b>2011-2012</b>	<b>2012-2013</b>	<b>2013-2014</b>
	\$690,573.00	\$697,504.00	\$697,504.00

**HOUSING & COMMUNITY DEVELOPMENT DIVISION  
2014 – 2015 UNIVERSAL APPLICATION FUNDING REQUEST**

**FACT SHEET**

**Project Title:** Priority 2: Housing Opportunities for Persons with AIDS, Permanent Housing (PH)

**Activity Type:** Housing Opportunities for Persons with AIDS

**Agency:** Northeast Florida AIDS Network, Inc. (NFAN)

**Contact Person:** Donna M. Fuchs, Executive Director

**Contact E-Mail:** dfuchs@nfanjax.org

**Address:** 2715 Oak Street

**Phone Number:** 904-356-1612 x18

**Fax Number:** 904-356-7095

**Funding Source:** HOPWA

**# of People/Units to be served:** 185 People

**Project Description:** Funds will be used for personnel services and operating expenditures to provide direct client supportive services of security deposits for rent and utilities for 185 clients with HIV/AIDS for permanent housing placement.

**Comments:** The agency has a track record in the community and provided detailed statement of need with statistic relevant to Jacksonville. The implementation schedule and goals are SMART.

**BUDGET**

**FUNDING REQUESTED** **\$223,188.00**

**Match Funds:** **\$1,142,484.00**

**In-kind Funds:** **\$43,239.00**

**Total Project Costs:** **\$1,408,911.00**

**Financial Comments:** Agency declared match is all external. Scored under leverage. Agency declared the same match as their P1 application where score was given. No leverage score for P2.

**Programmatic Score:** 56

**Financial Score:** 29

**Total Score:** 85

**Amount Recommended:** \$206,296.00

<b>Previous Year's Funding:</b>	<b>2011-2012</b>	<b>2012-2013</b>	<b>2013-2014</b>
	\$194,201.00	\$216,822.00	\$216,822.00

**HOUSING & COMMUNITY DEVELOPMENT DIVISION  
2014 – 2015 UNIVERSAL APPLICATION FUNDING REQUEST**

**FACT SHEET**

**Project Title:** Priority 1: RRHS Andy's Place/ALF HOPWA Supportive Housing Program

**Activity Type:** Housing Opportunities for Persons with AIDS

**Agency:** River Region Human Services

**Contact Person:** Dr. Tiffany Galvin Green, Executive Director

**Contact E-Mail:** tiffany.green@rrhs.org

**Address:** 2055 Reyko Road, Ste. 101

**Phone Number:** 904-899-6300 x4114

**Fax Number:** 904-899-6380

**Funding Source:** HOPWA

**# of People/Units to be served:** 28 People

**Project Description:** Funds will be used for 32% of salary, wages and benefits for a Housing Director and to provide direct client services to clients activity costs/supportive services for 28 individuals through wages and salaries of case managers that provide detoxification and dually diagnosed services to persons with HIV/AIDS, and supportive housing with 24-hour care giver services.

**Comments:** The agency has track record in the community and with grant administration. The agency touched on the need but could have clarified the special challenges faced by this population vs. individuals without medical conditions. The agency project description with associated staff detailed in narrative.

**BUDGET**

**FUNDING REQUESTED** **\$339,943.77**

**Match Funds:** **\$304,106.65**

**In-kind Funds:** **\$169,971.89**

**Total Project Costs:** **\$814,021.31**

**Financial Comments:** Match is 100% in-kind. No cash match declared. Audit identified reportable conditions unrelated to the grants received from the City.

**Programmatic Score:** 52

**Financial Score:** 26

**Total Score:** 78

**Amount Recommended:** \$299,151.02

**Previous Year's Funding:**

**2011-2012**

**2012-2013**

**2013-2014**

**\$414,532.00**

**\$414,631.00**

**\$414,631.00**

**HOUSING & COMMUNITY DEVELOPMENT DIVISION  
2014 – 2015 UNIVERSAL APPLICATION FUNDING REQUEST**

**FACT SHEET**

**Project Title:** Priority 2: RRHS Forging Useful Systems to Empower + (FUSE)

**Activity Type:** Housing Opportunities for Persons with AIDS

**Agency:** River Region Human Services

**Contact Person:** Dr. Tiffany Galvin Green, Executive Director

**Contact E-Mail:** tiffany.green@rrhs.org

**Address:** 2055 Reyko Road, Ste. 101

**Phone Number:** 904-899-6300 x4114

**Fax Number:** 904-899-6380

**Funding Source:** HOPWA      **# of People/Units to be served:** 20 Households

**Project Description:** Funds will be used for salaries, wages and benefits at 10% for a Housing Director and 20% for a Program Evaluator/Training Manager and to provide direct clients services to client activity costs/supportive services for 20 families through wages and salaries of case managers that provide detoxification and dually diagnosed services to persons with HIV/AIDS, and supportive housing with 24-hour care giver services.

**Comments:** The agency has track record in the community and with grant administration and statement of need is vague, it tells what the program will do but doesn't clearly address the community problem and need.

**BUDGET**

**FUNDING REQUESTED**      **\$213,979.00**

**Match Funds:**      **\$106,989.50**

**In-kind Funds:**      **\$106,989.50**

**Total Project Costs:**      **\$427,958.00**

**Financial Comments:** Match is 100% in-kind. No cash match declared. Audit identified reportable conditions unrelated to the grants received from the City.

**Programmatic Score:** 49      **Financial Score:** 26      **Total Score:** 75

**Amount Recommended:** \$0.00

<b>Previous Year's Funding:</b>	<b>2011-2012</b>	<b>2012-2013</b>	<b>2013-2014</b>
	N/A	N/A	N/A

# 2014-15 UNIVERSAL APPLICATION STATE HOUSING INITIATIVES PROGRAM (SHIP) OVERVIEW

## \$4,015,023 Allocation

Eligibility Category	# of Agencies Requesting Funding	Amount Requested	# of Agencies Passed Scoring Min. 70	# of Agencies Awarded Funds	Amount Awarded	Percent of funds awarded
SHIP Administration-10%	In-house	\$401,502.00	N/A	N/A	\$401,502.00	10%
SHIP-Target Area Rehab & Dev	0	\$2,205,516	N/A	N/A	\$2,205,516	55%
SHIP Homeowner Rehabilitation	4	\$2,505,000.00	0	0	\$0	0%
SHIP-Downpayment Assistance	In-house	\$500,000.00	N/A	N/A	\$500,000.00	12%
SHIP Disability Rehabilitation-20%	In-house	\$803,005.00	N/A	N/A	\$803,005	20%
SHIP-Homeownership Counseling	5	\$335,600.00	1	1	\$105,000.00	3%
SHIP-Foreclosure Prevention	3	\$111,600.00	0	0	\$0	0%
Total SHIP Funds	12	\$6,862,223	1	1	\$4,105,023.00	100%



**HOUSING & COMMUNITY DEVELOPMENT DIVISION  
2014 – 2015 UNIVERSAL APPLICATION FUNDING REQUEST**

**FACT SHEET**

**Project Title:** Priority 1: St. Joseph Homeownership Pre Purchase Education & Counseling

**Activity Type:** Homeownership Counseling

**Agency:** Black Bottom Springfield Human Development Corp. DBA St. Joseph Homeownership

**Contact Person:** LaTasha Green-Cobb, Ministry Coordinator

**Contact E-Mail:** lgreencobb@sjhmhelps.com

**Address:** 485 West 1st Street

**Phone Number:** 904-435-7546

**Fax Number:** 904-435-7961

**Funding Source:** SHIP      **# of People/Units to be served:** 100 People

**Project Description:** Funds will be used to provide housing counseling services to 100 individuals as a prelude to home purchase.

**Comments:** Threshold not met. Audit not included. The agency indicated their audit is pending and included a profit/loss statement and balance sheet dated 3/31/14.

**BUDGET**

**FUNDING REQUESTED**      **\$25,000.00**

**Match Funds:**      **\$12,500.00**

**In-kind Funds:**      **\$12,500.00**

**Total Project Costs:**      **\$49,810.00**

**Financial Comments:** Agency failed to document any match. Does not meet threshold. Audit not included. No financial information included. Does not meet threshold.

**Programmatic Score:** 0      **Financial Score:** 0      **Total Score:** 0

**Amount Recommended:** \$0.00

<b>Previous Year's Funding:</b>	<b>2011-2012</b>	<b>2012-2013</b>	<b>2013-2014</b>
	N/A	N/A	N/A

**HOUSING & COMMUNITY DEVELOPMENT DIVISION  
2014 – 2015 UNIVERSAL APPLICATION FUNDING REQUEST**

**FACT SHEET**

**Project Title:** Priority 2: St. Joseph Homeownership Post Purchase/Foreclosure Intervention  
Home Preservation Education & Counseling

**Activity Type:** Homeownership Counseling

**Agency:** Black Bottom Springfield Human Development Corp. DBA St. Joseph Homeownership

**Contact Person:** LaTasha Green-Cobb, Ministry Coordinator

**Contact E-Mail:** lgreencobb@sjhmhelps.com

**Address:** 485 West 1st Street

**Phone Number:** 904-435-7546

**Fax Number:** 904-435-7961

**Funding Source:** SHIP      **# of People/Units to be served:** 75 People

**Project Description:** Funds will be used to provide foreclosure mitigation and prevention services to 75 individuals in an attempt to assist homeowners to keep their home.

**Comments:** Threshold not met. Audit not included. The agency indicated their audit is pending and included a profit/loss statement and balance sheet dated 3/31/14.

**BUDGET**

**FUNDING REQUESTED**      **\$31,500.00**

**Match Funds:**      **\$27,300.00**

**In-kind Funds:**      **\$23,548.00**

**Total Project Costs:**      **\$91,898.00**

**Financial Comments:**

**Programmatic Score:** 0      **Financial Score:** 0      **Total Score:** 0

**Amount Recommended:** \$0.00

<b>Previous Year's Funding:</b>	<b>2011-2012</b>	<b>2012-2013</b>	<b>2013-2014</b>
	N/A	N/A	N/A

**HOUSING & COMMUNITY DEVELOPMENT DIVISION  
2014 – 2015 UNIVERSAL APPLICATION FUNDING REQUEST**

**FACT SHEET**

**Project Title:** Priority 1: Housing Counseling

**Activity Type:** Homeownership Counseling

**Agency:** Community Homeownership Center, Inc.

**Contact Person:** Donna Karrar, Executive Director

**Contact E-Mail:** chceducates@gmail.com

**Address:** 1284 W. 20th Street

**Phone Number:** 904-355-2837

**Fax Number:** 888-372-0326

**Funding Source:** SHIP      **# of People/Units to be served:** 400 People

**Project Description:** Funds will be used to provide housing counseling services to 400 individuals as a prelude to home purchase.

**Comments:** The agency provided a detailed project description and although numerous statistics were provided the community need/problem were not address.

**BUDGET**

**FUNDING REQUESTED**      **\$100,000.00**

**Match Funds:**      **\$99,200.00**

**In-kind Funds:**      **\$25,000.00**

**Total Project Costs:**      **\$224,200.00**

**Financial Comments:** Match form not included in financial review package. Leverage form not included in financial review package. Amounts requested include \$82,272 to pay four volunteers \$22.14. .

**Programmatic Score:** 47      **Financial Score:** 18      **Total Score:** 65

**Amount Recommended:** \$0.00

<b>Previous Year's Funding:</b>	<b>2011-2012</b>	<b>2012-2013</b>	<b>2013-2014</b>
	\$40,000.00	\$65,000.00	\$65,000.00

**HOUSING & COMMUNITY DEVELOPMENT DIVISION  
2014 – 2015 UNIVERSAL APPLICATION FUNDING REQUEST**

**FACT SHEET**

**Project Title:** Priority 2: Foreclosure Mitigation & Foreclosure Prevention

**Activity Type:** Homeownership Counseling

**Agency:** Community Homeownership Center, Inc.

**Contact Person:** Donna Karrar, Executive Director

**Contact E-Mail:** chceducates@gmail.com

**Address:** 1284 W. 20th Street

**Phone Number:** 904-355-2837

**Fax Number:** 888-372-0326

**Funding Source:** SHIP      **# of People/Units to be served:** 86 People

**Project Description:** Funds will be used to provide foreclosure mitigation and prevention services to 86 individuals in an attempt to assist homeowners to keep their home.

**Comments:** The agency provided a detailed project description and although numerous statistics were provided the community need/problem were not address.

**BUDGET**

**FUNDING REQUESTED**      **\$30,100.00**

**Match Funds:**      **\$20,000.00**

**In-kind Funds:**      **\$15,000.00**

**Total Project Costs:**      **\$65,100.00**

**Financial Comments:** Match form not included in financial review package. Leverage form not included in financial review package.

**Programmatic Score:** 32      **Financial Score:** 17      **Total Score:** 49

**Amount Recommended:** \$0.00

<b>Previous Year's Funding:</b>	<b>2011-2012</b>	<b>2012-2013</b>	<b>2013-2014</b>
	N/A	N/A	N/A

**HOUSING & COMMUNITY DEVELOPMENT DIVISION  
2014 – 2015 UNIVERSAL APPLICATION FUNDING REQUEST**

**FACT SHEET**

**Project Title:** Housing Counseling

**Activity Type:** Homeownership Counseling

**Agency:** Family Foundations of Northeast Florida, Inc.

**Contact Person:** Martha Cox, VP, Resource Development

**Contact E-Mail:** marthac@familyfoundations.org

**Address:** 1639 Atlantic Blvd.

**Phone Number:** 904-396-8114

**Fax Number:** 904-398-6649

**Funding Source:** SHIP      **# of People/Units to be served:** 800 People

**Project Description:** Funds will be used to provide housing counseling services to 800 individuals as a prelude to home purchase.

**Comments:** The agency included all required documents. The agency provided a very detail background and capacity. The agency project description was detailed with SMART goals and objectives.

**BUDGET**

**FUNDING REQUESTED**      **\$105,000.00**

**Match Funds:**      **\$314,854.00**

**In-kind Funds:**      **\$0.00**

**Total Project Costs:**      **\$420,854.00**

**Financial Comments:** Match and Leverage were documented and sufficient.

**Programmatic Score:** 56      **Financial Score:** 31      **Total Score:** 87

**Amount Recommended:** \$105,000.00

<b>Previous Year's Funding:</b>	<b>2011-2012</b>	<b>2012-2013</b>	<b>2013-2014</b>
	\$240,000.00	\$100,000.00	\$100,000.00

**HOUSING & COMMUNITY DEVELOPMENT DIVISION  
2014 – 2015 UNIVERSAL APPLICATION FUNDING REQUEST**

**FACT SHEET**

**Project Title:** Priority 2: Housing Counseling

**Activity Type:** Homeownership Counseling

**Agency:** Habitat for Humanity of Jacksonville, Inc. (Habijax)

**Contact Person:** Angela Leatherbury, VP of Organizational Planning & Operations

**Contact E-Mail:** aleatherbury@habijax.org

**Address:** 2404 Hubbard Street

**Phone Number:** 904-208-6664

**Fax Number:** 904-798-2728

**Funding Source:** SHIP      **# of People/Units to be served:** 750 People

**Project Description:** Funds will be used to provide housing counseling services to 750 individuals as a prelude to home purchase.

**Comments:** Threshold not met (AUDIT). This agency has been on the City Auditor's non-compliance list since 10/31/2006.

**BUDGET**

<b><u>FUNDING REQUESTED</u></b>	<b>\$45,600.00</b>
<b>Match Funds:</b>	<b>\$35,597.00</b>
<b>In-kind Funds:</b>	<b>\$34,200.00</b>
<b>Total Project Costs:</b>	<b>\$115,397.00</b>

**Financial Comments:** Agency on Chapter 118 non-compliance listing. Ineligible for award until cleared.

**Programmatic Score:** 0      **Financial Score:** 0      **Total Score:** 0

**Amount Recommended:** \$0.00

<b>Previous Year's Funding:</b>	<b>2011-2012</b>	<b>2012-2013</b>	<b>2013-2014</b>
	\$40,000.00	\$30,000.00	\$30,000.00

**HOUSING & COMMUNITY DEVELOPMENT DIVISION  
2014 – 2015 UNIVERSAL APPLICATION FUNDING REQUEST**

**FACT SHEET**

**Project Title:** Priority 1: Comprehensive Homeowner's Education & Counseling

**Activity Type:** Homeownership Counseling

**Agency:** Jacksonville Urban League, Inc.

**Contact Person:** Wanda Baldwin Davis, Program Director

**Contact E-Mail:** wandadavis@jaxul.org

**Address:** 903 W. Union Street

**Phone Number:** 904-366-3470

**Fax Number:** 904-356-8369

**Funding Source:** SHIP      **# of People/Units to be served:** 200 People

**Project Description:** Funds will be used for salaries, wages and benefits at 49% for one (1) Program Director, 100% for one (1) Administrative Assistant/Intake Clerk, and 33% for one (1) Financial Advisor to provide housing counseling services to 200 individuals as a prelude to home purchase.

**Comments:** The program is HUD certified and provides valuable needed information to potential homebuyers however, agency is still out of compliance with reporting requirements despite numerous correspondence. The statement of need addressed all elements and specific to Jacksonville. The program delivery narrative did not address who, on staff, has the financial responsibility for the program.

**BUDGET**

<b><u>FUNDING REQUESTED</u></b>	<b>\$60,000.00</b>
<b>Match Funds:</b>	<b>\$39,541.25</b>
<b>In-kind Funds:</b>	<b>\$21,100.00</b>
<b>Total Project Costs:</b>	<b>\$120,641.71</b>

**Financial Comments:** Agency did not document any match. Agency did not properly document any leverage. Agency did not include method of calculation for budget items. Budget narrative does not appear to tie to Detail or Summary. No documentation regarding how amounts for equipment were derived.

**Programmatic Score:** 47      **Financial Score:** 14      **Total Score:** 61

**Amount Recommended:** \$0.00

<b>Previous Year's Funding:</b>	<b>2011-2012</b>	<b>2012-2013</b>	<b>2013-2014</b>
	\$50,000.00	\$30,000.00	\$30,000.00

**HOUSING & COMMUNITY DEVELOPMENT DIVISION  
2014 – 2015 UNIVERSAL APPLICATION FUNDING REQUEST**

**FACT SHEET**

**Project Title:** Priority 2: Foreclosure Mitigation & Prevention

**Activity Type:** Homeownership Counseling

**Agency:** Jacksonville Urban League, Inc.

**Contact Person:** Wanda Baldwin Davis, Program Director

**Contact E-Mail:** wandadavis@jaxul.org

**Address:** 903 W. Union Street

**Phone Number:** 904-366-3470

**Fax Number:** 904-356-8369

**Funding Source:** SHIP      **# of People/Units to be served:** 200 People

**Project Description:** Funds will be used for salaries, wages and benefits at 49% for one (1) Program Director and 100% for one (1) Intake Clerk to provide foreclosure mitigation and prevention services to 200 individuals in an attempt to assist homeowners to keep their home.

**Comments:** The program is HUD certified and provides valuable needed information to potential homebuyers however, agency is still out of compliance with reporting requirements despite numerous correspondence. The statement of need addressed all elements and specific to Jacksonville. The program delivery narrative did not address who, on staff, has the financial responsibility for the program.

**BUDGET**

<b><u>FUNDING REQUESTED</u></b>	<b>\$50,000.00</b>
<b>Match Funds:</b>	<b>\$39,091.71</b>
<b>In-kind Funds:</b>	<b>\$21,100.00</b>
<b>Total Project Costs:</b>	<b>\$109,791.71</b>

**Financial Comments:** Agency did not document any match. Agency did not properly document any leverage. Agency did not include method of calculation for budget items. Budget narrative does not appear to tie to Detail or Summary. No documentation regarding how amounts for equipment were derived.

**Programmatic Score:** 48      **Financial Score:** 14      **Total Score:** 62

**Amount Recommended:** \$0.00

<b>Previous Year's Funding:</b>	<b>2011-2012</b>	<b>2012-2013</b>	<b>2013-2014</b>
	N/A	N/A	N/A



**HOUSING & COMMUNITY DEVELOPMENT DIVISION  
2014 – 2015 UNIVERSAL APPLICATION FUNDING REQUEST**

**FACT SHEET**

**Project Title:** Priority 2: Urban Core Homeowner Rehabilitation

**Activity Type:** Housing Rehabilitation

**Agency:** Metro North CDC

**Contact Person:** Reggie Fullwood, Executive Director

**Contact E-Mail:** rfullwood@metronorthcdc.com

**Address:** 3103 N. Main Street

**Phone Number:** 904-358-1224

**Fax Number:** 904-358-1225

**Funding Source:** SHIP      **# of People/Units to be served:** 25 Households

**Project Description:** Funds will be used to rehabilitate 25 homes up to code standards, not to exceed \$25,000 for each low and moderate income homeowner in the Urban Core. Exceptions to exceed this amount will be made on an as needed basis.

**Comments:** The agency key staff has professional expertise administering grant funds however, agency is now on City's non-compliance list and technical assistance is consistently needed for all payment request and spanning all programs.

**BUDGET**

**FUNDING REQUESTED**      **\$855,000.00**

**Match Funds:**      **\$35,000.00**

**In-kind Funds:**      **\$0.00**

**Total Project Costs:**      **\$890,000.00**

**Financial Comments:** Agency declared \$35,000 match from developer fees, but there is no required board approval letter. No points awarded. Agency did not declare any leverage funding. Budget based upon estimates. Actual unit rehabilitations will be submitted for individual bid. Costs related with the identification of candidate homes and selection of contractors should be covered within the developer fee. Developer fee percentage limited, depending upon program requirements. Prior Year management letter comments related to construction interest, reconciliation of loan balances, inventory allowances and carry forward of net assets. Current year management letter comments related to construction interest, recording of unfunded loans, listing of grant numbers. Agency response appears to be adequate.

**Programmatic Score:** 40      **Financial Score:** 18      **Total Score:** 58

**Amount Recommended:** \$0.00

<b>Previous Year's Funding:</b>	<b>2011-2012</b>	<b>2012-2013</b>	<b>2013-2014</b>
	N/A	N/A	N/A

Revised: July 17, 2014

**HOUSING & COMMUNITY DEVELOPMENT DIVISION  
2014 – 2015 UNIVERSAL APPLICATION FUNDING REQUEST**

**FACT SHEET**

**Project Title:** Community Action Rehabilitation Program (CARP)

**Activity Type:** Housing Rehabilitation

**Agency:** Northeast Florida Community Action Agency, Inc. (NFCAA)

**Contact Person:** Berneitha K. McNair, Executive Director

**Contact E-Mail:** bmcnair@nfcaa.org

**Address:** 4070 Boulevard Center Dr., 4500 Bldg., Suite 200

**Phone Number:** 904-398-7472 x210

**Fax Number:** 904-398-7414

**Funding Source:** SHIP      **# of People/Units to be served:** 20 Households

**Project Description:** Funds will be used to rehabilitate 20 homes up to code standards, not to exceed \$25,000 for each low and moderate income homeowner in the Urban Core. Exceptions to exceed this amount will be made on an as needed basis.

**Comments:** Threshold not met (AUDIT). The agency did not include building lease, lease agreement for equipment, quotes for Contract Labor, Service Contracts, Rehab Materials or Recruitment Costs. DID NOT MEET THRESHOLD DUE TO OUTDATED AUDIT - PER FINANCE DIRECTOR'S STATEMENT.

**BUDGET**

**FUNDING REQUESTED**      **\$150,000.00**

**Match Funds:**      **\$150,000.00**

**In-kind Funds:**      **\$0.00**

**Total Project Costs:**      **\$300,000.00**

**Financial Comments:** Audit that was provided was 9/30/12. By the time the application was submitted, agency was required to submit an audit for 9/30/13. No points awarded for the stale audit. Likewise, the financial ratios have not been computed on the information provided.

**Programmatic Score:** 0      **Financial Score:** 0      **Total Score:** 0

**Amount Recommended:** \$0.00

<b>Previous Year's Funding:</b>	<b>2011-2012</b>	<b>2012-2013</b>	<b>2013-2014</b>
	N/A	N/A	N/A

**HOUSING & COMMUNITY DEVELOPMENT DIVISION  
2014 – 2015 UNIVERSAL APPLICATION FUNDING REQUEST**

**FACT SHEET**

**Project Title:** Priority 3: Owner Occupied Rehabilitation for Seniors and Veterans

**Activity Type:** Housing Rehabilitation

**Agency:** Northwest Jacksonville CDC

**Contact Person:** Paul Tutwiler, Executive Director

**Contact E-Mail:** ptutwiler2003@yahoo.com

**Address:** 3416 Moncrief Road, Suite 200

**Phone Number:** 904-598-9196

**Fax Number:** 904-598-9197

**Funding Source:** SHIP      **# of People/Units to be served:** 25 Households

**Project Description:** Funds will be used to rehabilitate 25 homes up to code standards, not to exceed \$25,000 for each low and moderate income senior or veteran homeowner. Exceptions to exceed this amount will be made on an as needed basis.

**Comments:** The agency key staff has professional expertise administering grant funds. The agency did not provide sufficient narrative documenting community need and did not describe the proposed project. The implementation schedule provided indicated project will begin in January 2015.

**BUDGET**

<b><u>FUNDING REQUESTED</u></b>	<b>\$500,000.00</b>
<b>Match Funds:</b>	<b>\$575,000.00</b>
<b>In-kind Funds:</b>	<b>\$0.00</b>
<b>Total Project Costs:</b>	<b>\$1,075,000.00</b>

**Financial Comments:** Match: Agency declared match from four (4) external sources. External sources cannot be used to meet match requirements. Additionally, there was no board resolution or letter confirming the set aside of the declared match funds. Leverage: Agency declared leverage from three (3) external sources and one (1) internal cash flow source. Two (2) of the sources were lines of credit which, as debt, cannot be used as leverage. The external and internal sources were declared in the agency's P1 application and cannot be used twice. There is no documentation as to how Covenant Contracting was selected. Requires Competitive Procurement. While the construction budget did not include any documentation of the proposed line items, the amount requested, per house, is consistent with what the Division would deem reasonable and appropriate for a project such as this. Documentation of individual subprojects will be provided at the time a home is selected. Division still awaiting agency's audit submission that was due on January 31, 2014 as of most recent May 2, 2014 follow-up. Management letter comments related to the small size of the organization.

**Programmatic Score:** 45      **Financial Score:** 21      **Total Score:** 66

**Amount Recommended:** \$0.00

<b>Previous Year's Funding:</b>	<b>2011-2012</b>	<b>2012-2013</b>	<b>2013-2014</b>
	N/A	N/A	N/A

Revised: July 17, 2014

**HOUSING & COMMUNITY DEVELOPMENT DIVISION  
2014 – 2015 UNIVERSAL APPLICATION FUNDING REQUEST**

**FACT SHEET**

**Project Title:** Owner Occupied Rehabilitation

**Activity Type:** Housing Rehabilitation

**Agency:** Operation New Hope

**Contact Person:** Robert Ownby, Housing Rehab Program Manager

**Contact E-Mail:** rownby@operationnewhope.com

**Address:** 1830 N. Main Street

**Phone Number:** 904-354-4673

**Fax Number:** 904-407-3729

**Funding Source:** SHIP      **# of People/Units to be served:** 50 Households

**Project Description:** Funds will be used to rehabilitate 50 homes up to code standards, not to exceed \$25,000 for each low and moderate income senior or veteran homeowner. Exceptions to exceed this amount will be made on an as needed basis.

**Comments:** The agency has extensive background in housing programs. The statement of need were clear and concise with statistics that are relevant to Jacksonville. The agency clearly described the urgency in meeting the need for rehabilitation. The agency provided a clear project description and the implementation schedule is realistic with SMART goals and objectives.

**BUDGET**

**FUNDING REQUESTED**      **\$1,000,000.00**

**Match Funds:**      **\$1,121,180.50**

**In-kind Funds:**

**Total Project Costs:**      **\$2,121,180.50**

**Financial Comments:** Agency match was not properly documented by a letter or resolution from agency board. These extra forms were not reviewed. While the construction budget did not include any documentation of the proposed line items, the amount requested, per house, is consistent with what the Division would be deemed reasonable and appropriate for a project such as this. Documentation of individual subprojects will be provided at the time a home is selected.

**Programmatic Score:** 57      **Financial Score:** 26      **Total Score:** 83

**Amount Recommended:** \$0.00

<b>Previous Year's Funding:</b>	<b>2011-2012</b>	<b>2012-2013</b>	<b>2013-2014</b>
	N/A	N/A	N/A

Revised: July 17, 2014

	AGENCY OR INDEX CODE TITLE	AMOUNT REQUESTED	RECOMMENDED AWARD FY 2014-2015										TOTALS	STRATEGY OR PROJECT TITLE
			HOME 2,256,024			CDBG	HOPWA	HOPWA Reallocated Funds	HESG	HESG Reallocated Funds	SHIP	CDBG Prog. Income		
	Available Funding		112,801.20	338,403.60	1,804,819.20	5,594,293	2,303,001	46,410.02	461,109	135,878.28	4,015,023	75,000	14,886,738.30	
			CHDO Op.	CHDO Dev.	Other									
1	Adult Services - Foster Grandparents Program	31,800.00				31,000.00							31,000.00	PS - Foster Grandparent Program
2	Adult Services - Independent Living Program	121,220.00				120,008.00							120,008.00	PS - Northside Senior Care
3	Adult Services - Senior Services	48,239.00				46,792.00							46,792.00	PS - Special Programs of Older Adults
4	Catherdal Tower	803,005.00									803,005		803,005.00	HI - Substantial Rehabilitation
5	Catholic Charities Bureau, Inc.	1,000,000.00					930,000.00	-					930,000.00	HI - Mortgage/Utility Assistance
6	Catholic Charities Bureau, Inc.	100,000.00										50,974.00	50,974.00	PS - Network Care-Prevent Homeless
7	Catholic Charities Bureau, Inc.	200,000.00							120,000.00				120,000.00	HESG-Case Management
8	CHDO Development Subsidy Pool	338,403.60		338,403.60									338,403.60	HI - HOME CHDO Subsidy Pool
9	CHDO Operating Pool	62,801.20	62,801.20										62,801.20	HI -HOME CHDO Operating Pool
10	City of Atlantic Beach	120,000.00				82,194.00							82,194.00	PFI-Housing Infrastructure
11	City of Jacksonville Beach	144,489.28				138,875.00							138,875.00	PS-Recreational & Community Support
12	City of Neptune Beach	46,521.00				45,469.00							45,469.00	PS-Senior Activity Center
13	Clara White Mission	68,577.00				33,206.00						24,026.00	57,232.00	PS - Vocational Training
14	Clara White Mission	102,500.00				102,500.00							102,500.00	PFI - Acquisition
15	COJ-Public Works	1,327,479.00				500,000.00							500,000.00	PFI-Civic ADA Accessibility
16	COJ-Public Works-Pine Forest	1,022,500.00				835,280.00							835,280.00	PFI-Curb & Gutter
17	COJ-Public Works-Larsen	782,036.89				479,929.00							479,929.00	PFI-Water Main
18	COJ-Regulatory Compliance	300,000.00				150,000.00							150,000.00	Clearance & Demolition
19	COJ-Youthbuild Program	50,000.00				25,000.00							25,000.00	PS-PT Service Counselor
20	Community Connection	85,600.00				20,000.00							20,000.00	PS - Employment-Literacy
21	daniel Memorial	24,971.00				24,971.00							24,971.00	PFI-Renovation Hillside Cottage
22	Edward Waters College	48,084.00				26,967.00							26,967.00	PS-Elderly Health Literacy
23	Emergency Services & Homeless Coalition-P1	50,000.00							46,500.00				46,500.00	HESG-Data Collection & Analysis
24	Emergency Services & Homeless Coalition-P2	166,966.85							59,498.00				59,498.00	HESG-Day Resource Center
25	Family Foundations	105,000.00									105,000.00		105,000.00	HI - Homeownership Counseling
26	Family Support Services of North Florida, Inc.	56,479.00				28,810.00							28,810.00	PS-Early Education Partnership
27	Gateway Community Services	78,355.48					65,969.00						65,969.00	HI - Linking People to Housing
28	Girl Scouts of Gateway Council, Inc.	47,669.96				35,753.00							35,753.00	PS - Girl Scouts(Niamoja Troops)
29	HCDD Headstart to HOME Ownership	1,079,217.20			579,217.20						500,000.00		1,079,217.20	HI - Downpayment Assistance
30	HCDD - Targeted Area Rehab. & Development	3,205,516.00			1,000,000.00						2,205,516.00		3,205,516.00	HI - Rehabilitation & Development
31	HCDD Owner-Occupied Rehabilitation Program	535,000.00				535,000.00							535,000.00	HI - Housing Rehabilitation
32	HCDD-Owner-Utility Tap-In Program	300,000.00				300,000.00							300,000.00	HI - Housing Utility Tap-In Program
33	I.M. Sulzbacher Center for the Homeless	297,780.00							141,057.00	135,878.28			276,935.28	HESG - Emergency Shelter & Recovery Svcs
34	Jacksonville Area Legal Aide	39,420.00				29,350.00							29,350.00	PS-Counsel Center for CDC
35	Jacksonville Chamber Foundation	43,225.00				43,225.00							43,225.00	ED-Northside Small Business Center
36	Jacksonville Human Rights Commission *\$20,000.00 from CDBG ADMIN \$'s	25,000.00				20,000.00							20,000.00	AD- Fair Housing Administration Costs
37	Jacksonville Housing Authority-Brentwood	25,000.00				18,750.00							18,750.00	PS - Neighborhood Network Center

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			CHDO Op.	CHDO Dev.	Other									
38	Jacksonville Housing Authority-Oaks at Durkeeville	243,596.14				243,596.00							243,596.00	HI-Rehabilitation & Conversion
39	Jacksonville Housing Authority-Self Sufficiency	25,000.00				21,250.00							21,250.00	PS-Family Self Sufficiency Program
40	Learn to Read	30,000.00				24,000.00							24,000.00	PS-Jax Reads
41	Lutheran Social Services	508,117.54					132,271.00						132,271.00	HI - AIDS Care and Education
42	Northeast Florida AIDS Network, Inc.-Priority#1	698,822.00					646,634.00						646,634.00	HI - Mortgage/Utility Assistance-STRMU
43	Northeast Florida AIDS Network, Inc.-Priority #2	223,188.00					206,296.00						206,296.00	HI - Permanent Housing (AIDS)
44	Operation New Hope-Priority #1	85,000.00	50,000.00			-							50,000.00	HI - Operating Subsidy
45	Operation New Hope	50,337.50				50,337.00							50,337.00	PFI - Klutho Building Improvements
46	Pine Castle, Inc.	30,043.14				24,034.00							24,034.00	PS - Community Employment Initiative
47	Professional Opportunities Program for Students	30,000.00				18,810.00							18,810.00	PS-POPS
48	River Region Human Services, Inc.	339,943.77					252,741.00	46,410.02					299,151.02	HI - Adult Living Facility (AIDS)
49	Salvation Army	62,125.00							61,776.00				61,776.00	HESG-Case Management
50	The ARC Jacksonville, Inc.	42,700.00				20,000.00							20,000.00	PS - People Accessing Their Habits (PATH)
51	The Bridge of NE Florida, Inc.	50,000.00				38,800.00							38,800.00	PS - Weaver Zone Initiative
52	Women's Center of Jacksonville-Priority #1	33,554.00				28,520.00							28,520.00	PS - Mental Health Counseling
	HCDD ADMINISTRATION COST					1,098,859.00							1,098,859.00	HCDD- Administration Costs
	HCDD DELIVERY COST					353,008.00							353,008.00	HCDD - Delivery Costs
	HOME ADMINISTRATION				225,602.00								225,602.00	HOME- Administration Costs
	SHIP ADMINISTRATION										401,502.00		401,502.00	SHIP- Administration Costs
	HOPWA ADMINISTRATION						69,090.00						69,090.00	HOPWA- Administration Costs
	HESG ADMINISTRATION								32,278.00				32,278.00	HESG- Administration Costs
	TOTAL	15,335,283.55	112,801.20	338,403.60	1,804,819.20	5,594,293	2,303,001	46,410.02	461,109	135,878.28	4,015,023	75,000	14,886,738.30	
	PROGRAM TOTAL			2,256,024.00		5,594,293.00	2,303,001.00	46,410.02	461,109.00	135,878.28	4,015,023.00	75,000.00		

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# BOARD MEETING SUBMISSION FORM

(All information must be completed prior to Submission)

**AGENDA NAME: SHIP LHAP Technical Amendment**

(This is the name of the item to place on the Agenda)

**Today's Date: 7/17/2014**

**Please check only one:** ☐ JHFA ☒ JHCDC ☐ NWJEDF

**Please check only one:**

☐ Reports ☐ Staff Reports ☒ ACTION ITEM ☐ New Business ☐ Old Business

**Name of Person/s that will be presenting item at the meeting: Dayatra Coles**

**Background/Description:** Staff is requesting approval for the revision of the State Housing Initiative Partnership Local Housing Assistance Plan. A redline version of the Amendment is attached.

**Are funds available for this item (if applicable):** ☐ Yes ☐ No ☒ N/A \_\_\_\_\_  
*Finance Dir. or Senior Acct. Signature*

**RECOMMENDATION:**

\*\*\*\*\*

## ATTACHMENTS (Check Here if N/A ☐ )

<p>Name of Attachment1 SHIP LHAP Technical Revision (Redlined)</p> <p>Name of Person/s responsible for submitting attachment D. Coles</p> <p>Are there signatures required? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p>	<p>Name of Attachment2</p> <p>Name of Person/s responsible for submitting attachment</p> <p>Are there signatures required? <input type="checkbox"/> Yes <input type="checkbox"/> No</p>
<p>Name of Attachment3</p> <p>Name of Person/s responsible for submitting attachment</p> <p>Are there signatures required? <input type="checkbox"/> Yes <input type="checkbox"/> No</p>	<p>Name of Attachment4</p> <p>Name of Person/s responsible for submitting attachment</p> <p>Are there signatures required? <input type="checkbox"/> Yes <input type="checkbox"/> No</p>

Moved: \_\_\_\_\_ Second: \_\_\_\_\_ Other: \_\_\_\_\_ Quorum # \_\_\_\_\_

*Motion Note:*



**CITY OF JACKSONVILLE/DUVAL COUNTY  
LOCAL HOUSING ASSISTANCE PLAN (LHAP)**

**FOR FISCAL YEARS**

**2012 - 2013**

**2013 - 2014**

**2014 - 2015**

**I. PROGRAM DESCRIPTION:**

**A. Name of the Participating Local Government and Interlocal if Applicable**

City of Jacksonville/Duval County – Consolidated Government

Interlocal: Yes \_\_\_\_\_ No   X  

Name of Participating Local Government(s) in the Interlocal Agreement:  
N/A

**B. Purpose of the Program**

Creation of the Plan is for the purpose of meeting the housing needs of the very low, low and moderate-income households, to expand production of and preserve affordable housing, to further the housing element of the local government comprehensive plan specific to affordable housing.

**C. Fiscal Years Covered by the Plan**

  X   2012 - 2013

  X   2013 - 2014

  X   2014 - 2015

**D. Governance**

The SHIP Program is established in accordance with Section 420.907-9079, Florida Statutes and Chapter 67-37.007 Florida Administrative Code. The SHIP Program does further the housing element of the local government Comprehensive Plan. In addition, pursuant to §420.907 et seq., Florida Statutes, Chapter 67-37, Florida Administrative Code and Chapter 555, Ordinance Code of the City of Jacksonville, Housing and Community Development Division, has been established as the housing agency for the City of Jacksonville/Duval County for the State Housing Initiative Partnership (SHIP) funds.

**E. Local Housing Partnership**

SHIP Program encourages building active partnerships between government, lenders, builders and developers, real estate professionals, advocates for low to moderate income persons and community groups.

**F. Leveraging**

The Plan is intended to increase the availability of affordable housing by combining local resources and cost saving measures into a local housing partnership and using public and private funds to reduce the cost of housing. SHIP funds may be leveraged with or used to supplement private funding sources and other Florida Housing Finance Corporation programs and to provide local match to obtain federal housing funds. SHIP funds are highly leveraged in order to reduce the cost of housing. For example, first mortgage funding is provided by local lenders, with SHIP funds being utilized in a blended mortgage product resulting in lower interest rates. The owner-occupied rehabilitation program is also coordinated with other forms of public funds, such as CDBG, HOME, Vacant Registry and WAP, to provide for the extensive repair needs of Jacksonville's older housing stock. Also, local SHIP funds have been used as match for state and federal housing dollars for multi-family developments and for providing housing to special needs and homeless populations.

Finally, sub-recipient agencies that serve as point of contact for the utility and rental deposit program utilize FEMA funds as well as local fundraising to enhance the pool of funds available for emergency rental assistance.

**G. Public Input**

Public Input was solicited through face-to-face meetings with housing providers, social service providers, local lenders, and neighborhood associations. Public input was solicited through the local newspaper in the advertising of the Local Housing Assistance Plan and the Notice of Funding Availability.

**H. Advertising and Outreach**

The City of Jacksonville, Duval County – Housing and Community Development Division shall advertise the notice of funding availability in a newspaper of general circulation and periodicals serving ethnic and diverse neighborhoods, at least 30 days before the beginning of the application period. If no funding is available due to a waiting list, no notice of funding availability is required.

**I. Discrimination**

In accordance with the provisions of ss. 760.20-760.37, it is unlawful to discriminate on the basis of race, creed, religion, color, age, sex, marital status, family status, national origin, or handicap in the award application process for eligible housing.

**J. Support Services and Counseling**

Support Services are coordinated by Housing and Community Development Division, a City agency, bringing together all segments of the affordable housing community. The Jacksonville Housing & Community Development Commission (JHCDC) provides affordable housing services and funding to non-profit housing providers and is the lead agency responsible for coordination of housing services throughout the Consolidated City of Jacksonville. Available support services may include but are not limited to: Owner-occupied Housing Rehabilitation, Down payment Assistance, Homeownership Counseling (Pre and Post), Foreclosure Mitigation Counseling, Emergency Rental Assistance, Development Subsidy, Credit Counseling, Foreclosure Prevention and Fair Housing Counseling.

**K. Purchase Price Limits**

**Purchase Price Limits:** The purchase price limits are updated annually in accordance with Section 420.9075 (4)(c), F.S.. For acquisition activities, the purchase price of a newly constructed or existing home may not exceed the limit established by the Florida Housing Finance Corporation. All properties to be assisted by SHIP dollars must be located in Duval County. The sales price or value of a new or existing eligible housing may not exceed 90% of the average area purchase price in the statistical area in which the eligible housing is located. Such average area purchase price that may be calculated for any 12-month period beginning not earlier than the fourth calendar year prior to the year in which the award occurs. The sales price of new and existing units, which can be lower but may not exceed 90% of the median area purchase price established by the U.S. Treasury Department or as described above.

The methodology used is:

<u>          </u>	Independent Study
<u>  X  </u>	U.S. Treasury Department (2007-26 as amended from time to time)
<u>          </u>	Local HFA Numbers

**L. Income Limits, Rent Limits, Affordability and Special Provisions**

The Income and Rent Limits used in the SHIP Program are updated annually from the Department of Housing and Urban Development and distributed by Florida Housing Finance Corporation. Affordable means that monthly rents or mortgage payments including taxes and insurance do not exceed 30 percent of that amount which represents the percentage of the median annual gross income for the households as indicated in Section 420.9071 (19), (20), and (28) F.S. However, it is not the intent to limit an individual household's ability to devote more than 30% of its income for housing, and housing for which a household devotes more than 30% of its income shall be deemed Affordable if the first institutional mortgage lender is satisfied that the household can afford mortgage payments in excess of the 30% benchmark and in the case of rental housing does not exceed those rental limits adjusted for bedroom size.

In addition, the income and rent limits used in the SHIP program allow for special provisions for Essential Services Personnel. Essential Services Personnel means persons in need of affordable housing who are employed in occupations or professions in which they are considered essential services personnel, which may include but is not limited to teachers, police officers, firefighters, health care workers, and emergency services personnel, and whose total annual gross household incomes do not exceed 140% of area median income.

**M. Welfare Transition Program**

Should an eligible sponsor be used, the City of Jacksonville, Duval County, Florida has developed a qualification system and selection criteria for applications for Awards to eligible sponsors, which includes a description that demonstrates how eligible sponsors that employed personnel from the Wages and Workforce Development Initiatives programs will be given preference in the selection process.

**N. Monitoring and First Right of Refusal**

In the case of rental housing, the staff of the Housing and Community Development Division has administrative authority for implementing the local housing assistance plan. Assisted rental developments shall annually monitor and determine tenant eligibility or, to the extent another governmental entity provides the same monitoring and determination, a municipality, county or local housing finance authority may rely on such monitoring and determination of tenant eligibility. However, any loan or grant in the original amount of \$3,000 or less shall not be subject to these annual monitoring and determination of tenant eligibility requirements. Tenant eligibility will be monitored for at least annually 15 years or the term of assistance whichever is longer unless as specified above. Eligible sponsors that offer rental housing for sale before 15 years or that have remaining mortgages funded under this program must give a first right of refusal to eligible nonprofit organizations for purchase at the current market value for continued occupancy by eligible persons.

**O. Administrative Budget**

A detailed listing including line-item budget of proposed Administrative Expenditures is attached as Exhibit J. These are presented on an annual basis for each State fiscal year submitted.

The City of Jacksonville/Duval County finds that the moneys deposited in the local housing assistance trust fund shall be used to administer and implement the local housing assistance plan.

**Section 420.9075 Florida Statute and Chapter 67-37, Florida Administrative Code, states:**

"A county or an eligible municipality may not exceed the 5 percent limitation on administrative costs, **unless** its governing body finds, by resolution, that 5 percent of the local housing distribution plus 5 percent of program income is insufficient to adequately pay the necessary costs of administering the local housing assistance plan."

**Section 420.9075 Florida Statute and Chapter 67-37, Florida Administrative Code, further states:**

"The cost of administering the program may not exceed 10 percent of the local housing distribution plus 5% of program income deposited into the trust fund, except that small counties, as defined in s. 120.52(17), and eligible municipalities receiving a local housing distribution of up to \$350,000 may use up to 10 percent of program income for administrative costs."

*The City of Jacksonville/Duval County has adopted the above findings in the attached resolution, Exhibit F.*

**P. PROGRAM ADMINISTRATION:**

Administration of the local housing assistance plan is the responsibility of the City of Jacksonville/Duval County. Should a third party entity or consultant contract for all of part of the administrative or other functions of the program provide in detail the duties, qualification and selection criteria.

**Q. Essential Service Personnel**

In accordance with Rule Chapter 67-37.002(8) F.A.C. and Chapter 67-37.005(8), F.A.C. and Section 420.9075(3)(a) FS, Essential Service Personnel means persons in need of affordable housing who are employed in occupations or professions in which they are considered essential services personnel, which may include but is not limited to teachers, police officers, firefighters, health care workers, and emergency services personnel, and whose total annual gross household incomes do not exceed 140% of area median income.

**R. Homeownership & Foreclosure Mitigation Counseling**

Funding will be provided to nonprofit organizations for the purpose of maintaining an ongoing home buyers' credit counseling program to provide more home buyers access to mortgage credit. Households under this strategy will be selected on a first come, first served basis. SHIP funds will be provided as a grant. Families with credit and/or budgetary problems will receive extended training and assistance to ready them for the home buying process. Additionally, families who have experienced financial difficulties and as a result are delinquent or in default on their mortgage can receive foreclosure mitigation counseling. This form of counseling occurs when a family's financial difficulty have been reversed; however, intervention from a HUD certified counseling agency on the behalf of the property owners is warranted. Said agency will work to remedy the delinquency and negotiate any modification needed. Any additional funding required by the mortgage servicing agent will be solely the responsibility of the applicant.



Eligible sponsors will be selected utilizing the selection criteria as approved by the local government such as included in the attached Scoring Matrix, which may be updated from time to time. SHIP funds allocated for this strategy may be leveraged with federal, state, local, private funds and volunteer labor.

**S. Initiative for Green Building Design 420.9075(3) (d), F.S.:**

The City encourages the incorporation of innovative design techniques into construction and rehabilitation projects for ongoing sustainability and affordability. The initiatives include, but are not limited to, green building principles, storm resistant construction and energy efficient features, installation of energy efficiency doors and windows, star appliances, water heater, low flow water saving toilets, and faucets. Hurricane preventative measures include, but are not limited to, storm resistant construction, hurricane shutters, garage doors, architectural roof shingles and window that meet the current Florida Building Code.

**II. LHAP HOUSING STRATEGIES**

**A. Owner Occupied Rehabilitation**

1. **Summary of Strategy:** Funds will be provided for repairs and rehabilitation of substandard owner-occupied single-family units in accordance with the Housing Rehabilitation Program Policies and Procedures. It is the intent of this activity to emphasize the upgrading of very low, and low-income homeowner conditions by increasing the funds available for rehabilitation of deteriorated homes (If funds are available, moderate income households will be served). Repairs determined by Housing and Community Development Division staff working the Municipal Code Compliance Division may be given priority and may be addressed first and treated as Emergency Repairs. Emergency Repairs may include, but not limited to, roof repairs, dangerous electrical conditions, lack of adequate water or sewer to the home and handicapped accessibility, or other conditions, which could be dangerous to the occupant if left uncorrected. The combined total amount of repairs per unit, including funds spent to correct the emergent situation may not exceed \$55,000.00. Contracts exceeding \$45,000 up to \$55,000 shall be reviewed by Housing and Community Development Division prior to beginning rehabilitation to insure that the rehab project is feasible. Feasibility will be based on the property being able to be meet the local building code after rehabilitation.
2. **Fiscal Years Covered:** 2012-2013, 2013 – 2014, 2014 - 2015.
3. **Income Categories to be Served:** Households with annual income up to 120% of median income are eligible for assistance under this strategy and will be selected on a first come, first qualified basis. Persons assisted by projects intended to serve those that fit the homeless definition in 420.621(5) F.S. shall automatically be considered income eligible under HUD guidelines.
4. **Maximum Award Per Project:** The program provides moderate to substantial rehabilitation assistance on a first come, first served basis in accordance with the Homeowner Rehabilitation Waiting List to low and moderate-income homeowners in an amount not to exceed \$55,000.
5. **Terms, Recapture and Default:** For all homeowners receiving assistance, whose total household income is at or below 80% of the area median income, the total repair amount shall be a zero interest deferred loan. The term of each deferred loan is based on the amount of assistance received by the homeowner, as described in Matrix I.

### MATRIX I

AMOUNT OF ASSISTANCE	TERM of FORGIVENESS
\$1 – \$14,999	5 Years
\$15,000 - \$40,000	10 Years
\$40,001 – Above	15 years

Applicants whose gross household income exceeds 80% of the median income as listed below **WILL NOT** be eligible to receive a total grant. These applicants may only apply for a \$1 for \$1 match in the form of a deferred payment loan from the Provider. Households with incomes between 81% - 120% of median income will receive a non-amortizing deferred loan for the term of 15 years; with the total balance due in full at the end of the lien period, upon sell, transfer of title, or if the homeowner ceases to occupy the home as their primary residence. However, as an incentive to encourage repayment of the deferred payment loan, the homeowner receives a reduction in the total debt owed if they agree to pay in full as shown below in Matrix II:

### MATRIX II

Terms of the Lien	Amount Due	Amount Forgiven
Years 1 - 5	65%	35%
Years 6 - 7	75%	25%
Years 8 - 9	85%	15%
Years 10 -15	100%	0%

A deferred payment loan shall be satisfied upon completion of the below mentioned terms provided the owner continues to occupy the homes as their principal residence. Repayment of the full amount shall become due if any of the following occurs within the deferred loan term:

- a) Homeowner sells, transfers, or disposes of the property by any means, including bankruptcy, or deed in lieu of foreclosure;
- b) Homeowner no longer occupies the unit as their principal residence;
- c) Refer to Housing and Community Development Division's Subordination Policy (Attachment A)

Please Note – An heir may assume the debt as long as said heir becomes the owner occupant and meets income guidelines.

6. **Recipient Selection Criteria:** Eligible households will be served on a first come first served basis, with preference given first to applicants below 80% of median household income. Families with an annual household income above 120% of the median shall not be served under this strategy. Households receiving temporary emergency repairs that do not bring the complete property up to the local building code will be allowed to receive additional funds at a future date to insure that the



property meets the local building code. Properties will only be granted funds to insure that the property meets local building code on a one-time basis.

7. **Sponsor Selection Criteria:** Eligible sponsors will be selected utilizing the selection criteria as approved by the local government utilizing scoring criteria such as included in the attached Scoring Matrix, which may be updated from time to time.
8. **Additional Information:** Funds allocated for this strategy may be leveraged with federal, state, and local CDBG, WAP, Private Funds, Donations, and Volunteer Labor and also used as a match for HOME.

#### **B. ~~Owner-Occupied Rehabilitation for~~ Target Area Rehabilitation and DevelopmentNeighborhoods**

1. **Summary of Strategy:** Funds may be administered internally or used in conjunction with a non-profit developers for owner occupied rehabilitation, lot acquisition and construction financing for newly constructed or rehabilitated homes, and/or redevelopment through demolition and reconstruction of affordable housing with a Target Area Revitalization Strategy. Funds will be provided for repairs and rehabilitation of substandard owner-occupied single-family units in accordance with the Housing Rehabilitation Program Policies and Procedures in designated target areas only. These areas include any neighborhood with an approved Neighborhood Action Plan, part of a strategic revitalization community project, area designated for ash mitigation (Project New Ground) and/or Neighborhood Stabilization (NSP) target areas.

It is the intent of this activity to emphasize the upgrading of very low, and low-income homeowner conditions by increasing the funds available for renovation of deteriorated homes (If funds are available, moderate income households will be served). Repairs determined by the Housing and Community Development Division staff working with the Municipal Code Compliance Division may be given priority and may be addressed first and treated as Emergency Repairs. Emergency Repairs may include, but not limited to, roof repairs, dangerous electrical conditions, lack of adequate water or sewer to the home and handicapped accessibility, or other conditions, which could be dangerous to the occupant if left uncorrected. The combined total amount of repairs per unit, including funds spent to correct the emergent situation may not exceed \$55,000.00. Contracts exceeding \$45,000 up to \$55,000 shall be reviewed by the Housing and Community Development Division prior to beginning rehabilitation to insure that the rehab project is feasible.

Rehabilitation associated with Project New Ground will be limited to façade repairs with a maximum award amount of \$25,000 in accord with the policies and procedures for the program. Feasibility will be based on the property being able to be meet the local building code after rehabilitation.

2. **Fiscal Years Covered:** 2012-2013, 2013 – 2014, 2014 - 2015.
3. **Income Categories to be Served:** Households with annual income up to 120% of median income are eligible for assistance under this strategy. Persons assisted by projects intended to serve those at risk of becoming homeless, economic homeless, situational homeless, or chronic homeless shall automatically be considered income eligible under HUD guidelines.
4. **Maximum Award Per Project:** The program provides moderate to substantial rehabilitation assistance on a first come, first served basis to households in

designated target area neighborhoods (those with neighborhood Action Plans) in accordance with the Homeowner Rehabilitation Waiting List to low and moderate-income homeowners in an amount not to exceed \$55,000. Rehabilitation associated with Project New Ground will be limited to façade repairs with a maximum award amount of \$25,000 in accord with the policies and procedures for the program.

Additionally, if a unit is a rental and is within a target neighborhood revitalization project and is not owned by a for-profit organization, a maximum of \$3,000 can be used for façade improvements only. The funding will be deemed a grant and not subject to affordability restrictions. If full rehab is required then the aforementioned is hereby null and void and the owner of said unit must formally apply for funding in accordance with an issued Request for Proposals. No exceptions.

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4. **Terms, Recapture and Default:** For all homeowners receiving assistance, whose total household income is at or below 80% of the area median income, the total repair amount shall be a zero interest deferred loan. The term of each deferred loan is based on the amount of assistance received by the homeowner, as described in Matrix I.

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**MATRIX I**

AMOUNT OF ASSISTANCE	TERM of FORGIVENESS
\$1 – \$14,999	5 Years
\$15,000 - \$40,000	10 Years
\$40,001 – Above	15 years

Program funds through a non-profit developer under the program guidelines must be paid off through the purchase by a homebuyer within 12 months of the initial disbursement of SHIP funds and before the end of the expiration of the non-profit developers' award contract. Pay off amount may be subject to any construction gap and/or affordability gap and an affordability instrument for a period of no greater than twenty (20) years must be executed by the buyer and recorded into public record. In the event of a Demolition and Reconstruction, an affordability instrument for a period of no greater than twenty (20) years must be executed by the owner occupants and recorded into public record.

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Applicants whose gross household income exceeds 80% of the median income as listed below **WILL NOT** be eligible to receive a total grant. These applicants may only apply for a \$1 for \$1 match in the form of a deferred payment loan from the Provider. Households with incomes between 81% - 120% of median income will receive a non-amortizing deferred loan for the term of 15 years; with the total balance due in full at the end of the lien period, upon sell, transfer of title, or if the homeowner ceases to occupy the home as their primary residence. However, as an incentive to encourage repayment of the deferred payment loan, the homeowner receives a reduction in the total debt owed if they agree to pay in full as shown below in Matrix II:

**MATRIX II**

Terms of the Lien	Amount Due	Amount Forgiven
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Years 1 - 5	65%	35%
Years 6 -7	75%	25%
Years 8 - 9	85%	15%
Years 10 -15	100%	0%

A deferred payment loan shall be satisfied upon completion of the below mentioned terms provided the owner continues to occupy the homes as their principal residence. Repayment of the full amount shall become due if any of the following occurs within the deferred loan term:

- a) Homeowner sells, transfers, or disposes of the property by any means, including bankruptcy, or deed in lieu of foreclosure;
- b) Homeowner no longer occupies the unit as their principal residence;
- c) Refer to the Housing and Community Development Division's Subordination Policy (Attachment A)

Please Note – An heir may assume the debt as long as said heir becomes the owner occupant and meets income guidelines.

**6. Recipient Selection Criteria:** Eligible households are those households in the designated target areas only and will be served on a first come first served based, with preference given first to applicants below 80% of median household income. Reconstruction activities on a lot owned by a person whose household income is less than 80% of the area median income and who owns said parcel 'free and clear', will be allowed when it is determined, by the Housing and Community Development Division, that rehabilitation under the Owner Occupied Rehabilitation Strategy is not feasible and as funding is available. Households receiving emergency repairs that do not bring the property up to the local building code will be allowed to receive additional funds at a future date to insure that the property meets local building code. Properties will only be granted funds to insure that the property meets local building code on a one-time basis.

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- 7. **Sponsor Selection Criteria:** Eligible sponsors will be selected utilizing the selection criteria as approved by the local government utilizing scoring criteria such as included in the attached Scoring Matrix, which may be updated from time to time.
- 8. **Additional Information:** Funds allocated for this strategy may be leveraged with federal, state, and local CDBG, WAP, Private Funds, Donations, and Volunteer Labor and also used as a match for HOME.

**C. Construction Loan Fund for Single Family Homeownership**

- 1. **Summary of Strategy:** Funds will may be administered internally or used in conjunction with a be provided to non-profit developers for lot acquisition and construction financing for newly constructed or rehabilitated homes. In addition, the Construction Loan Fund for Single Family Homeownership also includes "Demolition and Reconstruction" of homes on properties owned by low to moderate income families. The maximum per unit loan amount is 90% of the median area purchase price established by the U.S. Treasury Department as amended from time to time.
- 2. **Fiscal Years Covered:** 2012-2013, 2013 – 2014, 2014 - 2015.



3. **Income Categories to be Served:** Households with annual income up to 120% of median income are eligible for assistance under this strategy and will be selected on a first come, first served basis. ~~Loans made~~Program funds through a ~~to~~ non-profit developers under the program guidelines must be paid off through the purchase by a homebuyer within 12 months of the initial disbursement of SHIP funds and before the end of the expiration of the non-profit developers award contract. Pay off amount may be subject to any construction gap and/or affordability gap and an affordability instrument for a period of no greater than twenty (20) years must be executed by the buyer and recorded into public record. In the event of a Demolition and Reconstruction, an affordability instrument for a period of no greater than twenty (20) years must be executed by the owner occupants and recorded into public record.
4. **Maximum Award:** The maximum per unit loan amount shall be 90% of the median area purchase price established by the U.S. Treasury Department as amended from time to time.
5. **Terms, Recapture and Default:** Funds may be provided as a loan with an interest rate of ~~30%~~ for non-profit developers. The principal and interest is due when the homebuyer secures permanent financing. For reconstruction, the City will hold a ~~thirty-two~~ (20) year, non-amortizing mortgage that accrues 0% interest. As long as the property is the primary residence there will be no cost to the homeowner, other than property taxes and homeowner's insurance. If the property is sold or title transferred before the end of the thirty year term the entire cost of the home must be repaid to the City. If the owner dies during the mortgage period the property may be conveyed to an immediate family member. Provided the family member ~~occupy~~ occupies the home as their primary residence and ~~meet~~ meets certain income eligibility requirements, the new owner(s) ~~would may~~ have the option of re-paying the City in full or in equal monthly installments.
6. **Recipient Selection Criteria:** Eligible persons on a first come first served basis. Reconstruction activities on a lot owned by a ~~low to moderate income person~~ whose household income is less than 80% of the area median income and who owns said parcel 'free and clear' will be allowed when it is determined, by the Housing and Community Development Division, that rehabilitation under the Owner Occupied Rehabilitation Strategy is not feasible and as funding allows.
7. **Sponsor Selection Criteria:** Eligible sponsors will be selected utilizing selection criteria as approved by the local government utilizing scoring criteria such as included in the attached Scoring Matrix, which may be updated from time to time.
8. **Additional Information:** SHIP funds allocated for this strategy may be leveraged with federal, state, local, private funds and volunteer labor.

**D. Down payment/Closing Costs Assistance with Principal Buy-Down**

1. **Summary of Strategy:** Funds will be provided to assist potential homebuyers with reducing the total cost of purchasing a home. Eligible costs include down payment and closing costs, including pre-paid, inspections, and other associated reasonable fees. Funds may also be used to buy down the principal. Eligible units may be newly constructed or existing units, ~~which have had or will have repairs (minimum of \$100) within 12 months of closing. Evidence of repairs or rehabilitation must be adequately documented.~~ First mortgage lending may be provided by approved institutional first mortgage lenders and approved mortgage companies. The maximum per unit award is \$20,000.00 based on the household income levels shown in Matrix II.

% of the MEDIAN INCOME	ASSISTANCE AVAILABLE	ASSISTANCE AVAILABLE
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	COUNTY WIDE	IN TARGETED AREAS
Below 59%	Up to \$15,000.00	Up to \$20,000.00
60% - 69%	Up to \$12,500.00	Up to \$17,500.00
70% - 120%	Up to \$10,000.00	Up to \$15,000.00

## MATRIX II

2. **Fiscal Years Covered:** 2012-2013, 2013 – 2014, 2014 - 2015.
3. **Income Categories to be Served:** Households with annual income up to 120% of median income are eligible for assistance under this strategy.
4. **Maximum Award Per Unit:** \$20,000.00
5. **Terms, Recapture and Default:** Assistance will be provided as a 0% interest loan and shall become due if any of the following occurs:
  - a) Homebuyer sells, transfers, or disposes of the property by any means, including bankruptcy, or deed in lieu of foreclosure;
  - b) Homebuyer no longer occupies the unit as their principal residence; the case of the demise of the applicant, a income eligible relative may be able to assume said Note and Mortgage
  - c) Refer to the Housing And Neighborhood Department's Subordination Policy (Attachment A)

Please Note – The subordinate mortgage lien, not to exceed third position, shall be in place in the full amount for 15 years for all income levels. If the property remains the primary residence for the 15-year term, the lien will be forgiven in full.

6. **Recipient Selection Criteria:** Funds are awarded on a first come – first served basis and homebuyers must successfully complete homebuyer counseling by Housing and Neighborhoods Department approved counseling agency. Applicants must contribute 1% of the sale price, or appraised value or \$500, whichever is lower.
7. **Sponsor Selection Criteria:** Eligible sponsors will be selected utilizing the selection criteria as approved by the local government utilizing scoring criteria such as included in the attached Scoring Matrix, which may be updated from time to time.
8. **Additional Information:** SHIP funds allocated for this strategy may be leveraged with federal, state, local and private funds.

### E. **Emergency Rental Security and Utility Deposit Assistance**

1. **Summary of Strategy:** Funds will be provided to persons that are homeless or in danger of becoming homeless as a result of the inability to pay security and/or utility deposits when seeking residence in rental housing. Social service agencies and housing providers will serve as access points for persons needing assistance. Assistance is limited to a one time maximum award per household of up to \$1000.
2. **Fiscal Years Covered:** 2012-2013, 2013 – 2014, 2014 - 2015.
3. **Income Categories to be Served:** Households with annual income up to 80% of the median income are eligible for assistance under this strategy. Eligibility will be performed on an expedited basis and may include alternative forms of documentation such as current pay stubs and benefit letters, as well as oral verifications of employment wages, other income, and assets.
4. **Maximum Award Per Unit:** \$1000.00

5. **Terms, Recapture and Default:** SHIP funds provided for this activity will be in the form of a grant and repayment is not required. Any funds returned by an entity must be recycled by the Sponsor agency for the activity.
6. **Recipient Selection Criteria:** Households with annual income up to 80% of median income are eligible for assistance under this strategy. Eligibility will be performed on an expedited basis and may include alternative forms of documentation, such as current pay stubs and benefit letters, as well as oral verification of employment wages, other income, and assets.
7. **Sponsor Selection Criteria:** Eligible sponsors will be selected on a competitive basis utilizing the selection criteria as approved by the local government utilizing scoring criteria such as included in the attached Scoring Matrix, which may be updated from time to time.
8. **Additional Information:** SHIP funds allocated for this strategy may be leveraged with federal, state, local, private funds and volunteer labor.

**F. Rental Rehabilitation**

1. **Summary of Strategy:** SHIP funds may be administered internally or used in conjunction with a will be provided to for-profit and non-profit organizations for acquisition, construction and/or rehabilitation of rental housing projects to increase the supply of affordable rental units in Duval County. All assisted units will be monitored annually for tenant eligibility and unit affordability for a minimum period of 15 years. The Rental Rehabilitation Strategy also provides funds for transitional and permanent housing intended to serve special needs populations.

1.

2. **Fiscal Years Covered:** 2012-2013, 2013 – 2014, 2014 - 2015
3. **Income Categories to be Served:** Households with annual income up to 120% of median income are eligible for assistance under this strategy and will be selected on a first come, first served basis.
4. **Maximum Award Per Unit:** The maximum per unit grant or loan amount shall be based on the the lesser of \$130,000.00 or the maximum HOME subsidy limits based according to an bedroom size as amended from time to time.

Additionally, if rental rehabilitation is in conjunction with a target neighborhood revitalization project and is not owned by a for-profit organization, a maximum of \$3,000 can be used for facade improvements only. The funding will be deemed a grant and not subject to affordability restrictions. If full rehab is required then the aforementioned is hereby null and void and the owner of said unit must formally apply for funding in accordance with an issued Request for Proposals. No exceptions.

4.

5. **Terms, Recapture and Default:** SHIP funds will be provided as a 0% or a 3% deferred payment loan under the following conditions:
  - a) The developer has projects that will not cash flow using a traditional loan format.
  - b) The developer has applied for Low Income Housing Tax Credits or other financing that requires a local contribution.
  - c) Rental projects offered for sale prior to the end of the affordability period shall give first right of refusal to another non-profit organization. In the event of default during the 15 year affordability period, the full remaining loan balance will be due.

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- d) The objectives are to obtain the maximum leveraging of SHIP funds with the quickest return of principal and interest to the Jacksonville Housing Trust Fund for re-use.
  - e) Loans are made as a 0% interest rate deferred payment loan provided that 50% of SHIP assisted units are set aside for tenants earning less than 80% of the median income. Developments which do not provide at least 50% of SHIP assisted units to persons at or below 80% of median will incur a 3% interest on the full amount of the loan. The loan term is 15 years and an amortization period may be 40 years.
6. **Recipient Selection Criteria:** The development serves eligible persons earning up to 120% of the area median income on a first come first served basis and within the framework of Florida's Fair Housing Laws.
  7. **Sponsor Selection Criteria:** Eligible sponsors will be selected utilizing the selection criteria as approved by the local government such as included in the attached Scoring Matrix, which may be updated from time to time.
  8. **Additional Information:** SHIP funds allocated for this strategy may be leveraged with federal, state, local, private funds and volunteer labor.

#### **G. Development Subsidy**

1. **Summary of Strategy:** The program is open to Community Housing Development Organizations (CHDO), as certified by the Housing and Community Development Division, working as non-profit developers which meet the stated objectives in the request for proposals for this activity and that are interested in developing homeownership units in need of a subsidy for infill projects that may otherwise not be economically feasible. The program is for new construction and rehabilitation projects. The program provides gap financing in the form of a grant on projects that meet the program criteria. Only CHDO developers may apply. The rehabilitation or new construction of homes must be sold to buyers who intend to use the homes as their primary residence and meet income guidelines. Funding for each project is determined by the gap or "need" demonstrated by the developer through the project budget. The project gap is the difference between the cost to construct (or rehab) the unit and the sales price that the market will bear to sell that unit. In addition to demonstrating a funding gap, the following items must be included with the application:

- a) Evidence of site control and ALTA Title Commitment.
- b) Appraisal & HUD-1 for land.
- c) Evidence of Proper Zoning and Future Land Use.
- d) Evidence of site suitability (soil and environmental).
- e) Architectural rendering of proposed home.
- f) Rehab/New Construction Agreement (contract/written proposal with job specifications).
- g) Building Permit or Completed Building Permit Application.
- h) Development Pro Forma.
- i) Evidence of Construction Financing.
- j) Appraisal for Developed Site.
- k) Survey for subject property.
- l) Evidence of General Liability Insurance (Site Specific)

2. **Fiscal Years Covered:** 2012-2013, 2013 – 2014, 2014 - 2015

3. **Income Categories to be Served:** Households with annual income up to 120% of median income are eligible for assistance under this strategy and will be selected on a first come first serve basis.
4. **Maximum Award Per Person:** The maximum per unit cost shall not exceed \$30,000.
5. **Terms, Recapture and Default:** Subsidy is structured as a grant to the CHDO; however, in the event the homebuyer does not utilize Down Payment Assistance using SHIP or HOME funds, a Deed Restriction must be executed by homebuyer to ensure affordability for the period of 15 years.
6. **Recipient Selection Criteria:** Eligible persons earning up to 120% of the area median income on a first come first served basis.
7. **Sponsor Selection Criteria:** N/A
8. **Additional Information:** SHIP funds allocated for this strategy may be leveraged with federal, state, local, private funds and volunteer labor.

#### H. Foreclosure Prevention

1. **Summary of Strategy:** Funds will be provided to assist qualified homeowners with retaining their home and preventing foreclosure action of the first mortgage. Applicants must be delinquent at least two full monthly mortgage payments and/or in receipt of a letter from the mortgagor notifying the applicant of delinquency and/or intent to foreclose.
2. **Fiscal Years Covered:** 2012-2013, 2013 – 2014, 2014 - 2015
2. **Income Categories to be served:** Households with annual income up to 120% of median income are eligible for assistance under this strategy and will be selected on a first come, first served basis.
3. **Maximum Award Per Project:** \$8,500 toward eligible expenses. Eligible expenses include delinquent mortgage payments (principal, interest, taxes and insurance), attorney's fees, late fees and other customary fees associated with delivery costs (but excluding brokerage fees).
4. **Terms, Recapture and Default:** All homeowners receiving assistance will be given a zero interest deferred loan where permissible by the first mortgage. The term of each deferred loan is based as described on the Matrix I.

**MATRIX I**

AMOUNT OF ASSISTANCE	TERM of FORGIVENESS
\$1 - \$8,500	5 Years

A deferred payment loan shall be satisfied upon completion of the above mentioned terms provided the owner continues to occupy the homes as their principal residence. Repayment of the full amount shall become due if any of the following occurs within the deferred loan term:

- a) Homeowner sells, transfers, or disposes of the property by any means, including bankruptcy, or deed in lieu of foreclosure;
- b) Homeowner no longer occupies the unit as their principal residence;



- c) Homeowner fails to meet any of the terms of the Housing And Neighborhood Department's Subordination Policy (Attachment A)

Please Note – An heir may assume the debt as long as said heir becomes the owner occupant and meets income guidelines.

**6. Recipient Selection Criteria:**

- This strategy is designed to assist individuals who have fully amortizing conventional mortgages; including but not limited to Rural Development, Federal Housing Administration and Veteran's Administration loans. No other mortgage products will be accepted.
- Eligible households will be served on a first come first served basis, with preference given first to applicants below 80% of median household income.
- Applicants may receive funding under this program only one time.
- Applicant's must attend and complete a Budget/Credit/Debt Reduction course through an approved counseling agency.
- Applicant must show their ability to keep the house out of default, must want to keep the house, must show they can make monthly mortgage payments and/or must show that they have made all reasonable efforts to correct their financial hardship.
- Foreclosure prevention applicants must show that the nonpayment of their mortgage is due to the following eligible reasons:
  - Loss of employment or when hours have been reduced from full time to part-time.
  - Sudden medical expenses
  - Divorce or separation
  - Death in a family
  - Unforeseen home repair bills.

**7. Sponsor Selection Criteria:** Eligible sponsors must be an approved Housing Counseling Agency as evidenced by the following criteria; which may be amended from time to time:

- Certified as a HUD Approved Counseling Agency
- Staff responsible for counseling is certified as a Housing Counselor by NFCC or NeighborWorks
- Staff responsible for counseling has been certified and served as practitioner for a minimum of one year
- Use of Nationally recognized standards and curriculum.

**8. Additional Information:** SHIP funds allocated for this strategy may be leveraged with federal, state, local and private funds.

**I. Disaster Recovery:**

- 1. Summary of Strategy:** The Disaster Strategy provides assistance to households following a natural disaster as declared by an Executive Order from the President of the United States or Governor of the State of Florida. This strategy will only be implemented in the event of a natural disaster using any funds that have not yet been encumbered or additional disaster funds issued by Florida Housing Finance Corporation. SHIP disaster funds may be used for items such as, but not limited to:

- (a) purchase of emergency supplies for eligible households to weatherproof damaged homes;
- (b) interim repairs to avoid further damage; tree and debris removal required to make the individual housing unit habitable;
- (c) construction of wells or repair of existing wells where public water is not available;
- (d) payment of insurance deductibles for rehabilitation of homes covered under homeowner's insurance policies;
- (e) security deposit, rental assistance for the duration of the term of the Executive Order from the Florida Office of the Governor for eligible recipients that have been displaced from their homes due to damage from the storm;
- (f) other activities as proposed by the counties and eligible municipalities and approved by Florida Housing.

- 2. Fiscal Years Covered:** 2012-2013, 2013 – 2014, 2014 - 2015
- 3. Income Categories to be Served:** Households with annual income up to 120% of the median income are eligible for assistance under this strategy. Eligibility will be performed on an expedited basis and may include alternative forms of documentation such as current pay stubs and benefit letters, as well as oral verifications of employment wages, other income, assets and/or the Disaster Self Certification Form.
- 4. Maximum Award Per Person:** \$10,000
- 5. Terms, Recapture and Default:** SHIP funds provided for this activity will be in the form of a grant and repayment is not required.
- 6. Recipient Selection Criteria:** Eligible households will be served on a first come first served basis, with preference given first to applicants below 80% of median household income.
- 7. Sponsor Selection Criteria:** N/A
- 8. Additional Information:** SHIP funds allocated for this strategy may be leveraged with federal, state, local, private funds and volunteer labor.

### III. LHAP INCENTIVE STRATEGIES

- A. Expedited Permitting:** Adopted One Stop Permitting Process for Affordable housing projects by Ordinance No. 93-2047-1194. Covers all fiscal years activities to present. The incentive is administered by the Development Management Group.
- B. Definition of Affordable Housing:** Adopted by Ordinance No. 93-2047-1194, amended 1998 to conform to Chapter 420.9071 Florida Statutes. Covers all fiscal years' activities to present.
- C. Affordable Housing and Infill Housing Incentives:** Adopted by Ordinance No. 93-2047-1194, Formal certification process has been made more informal to make fee waiver requests simple. Waivers of subdivision requirements have been granted. Density bonus provisions are available. The City's multi-family zoning categories allow high densities without waivers. Covers all fiscal years' activities to present. The incentive is administered by the Planning and Development Department of the City of Jacksonville.
- D. Regulatory Relief -** Adopted by Ordinance No. 93-2047-1194 and 91-655. Waivers are provided for a number of subdivision regulations and development standards, parking

requirements, and density requirements. The City has not adopted impact fees. Covers all fiscal years activities to present. The incentive is administered by the Planning and Development Department of the City of Jacksonville.

**E. Inventory of Surplus City Property** - The City offers surplus land and housing to nonprofit organizations at no cost for development of affordable housing. Covers all fiscal years activities to present. The incentive is administered by the Housing and Community Development Division and the City of Jacksonville Real Estate Department.

**F. Waiver of Tax and Nuisance Abatement Liens** - The City provides funds to pay liens on property, which is being developed or repaired as affordable units in designated residential, and infill areas. Covers all fiscal years' activities to present. The incentive is administered by the Housing and Community Development Division and the City of Jacksonville Real Estate Department.

**G. Housing Concurrency Incentive** - Reservations of concurrency have been extended beyond normal timeframes in order to expedite affordable housing projects, and to minimize the costs to the project. Projects, which are undertaken within the boundaries of DRIs, are exempt from concurrency reviews. Covers all fiscal years activities to present.

**H. Ongoing Process of Review** - City Staff of the Planning and Development Department and the Subdivision and Regulatory Review Committee reviews, evaluates, and makes recommendations on all future ordinances, plans, regulations, policies, and procedures which have an impact on the provision of affordable housing. Covers all fiscal years activities to present.

#### EXHIBITS:

- A. Subordination Policy
- B. Scoring Matrix
- C. Timeline for Encumbrance and Expenditure
- D. Housing Delivery Goals Chart (HDGC) For Each Fiscal Year
- E. Certification Page
- F. Adopting Resolution (see Ordinance)
- G. Program Information Sheet
- H. Ordinance (2012-345-E)
- I. Inter-local Agreement – N/A
- J. Administrative Budget

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# Exhibit A

## Subordination Policy

## SUBORDINATION POLICY

It is the general policy of the City of Jacksonville's Housing and Community Development Division (the "Division") not to subordinate the City's mortgage on an applicant's property interest to allow for additional debt or cash out refinances. However, subordinations will be considered under the following circumstances:

- To refinance the applicant's existing first mortgage to a lower interest rate;
- To modify the applicant's existing first mortgage in conjunction with a lender-approved default workout; or
- To make needed repairs to the applicant's home, which if not corrected may pose a threat to the health and safety of the occupants; or for repairs that address code violations or incipient code violations. Only the cost of rehabilitation and applicable closing costs with market interest rates and terms will be considered.
  - In order for the subordination request to be considered where cash is to be provided for repairs, the applicant must obtain an itemized, written proposal from a licensed general, residential or building contractor, who will perform the work that necessitates a loan and mortgage to which the City's mortgage will be subordinated. No exceptions to this policy will be granted. The City maintains a list of approved, licensed contractors that the applicant may utilize to obtain such a bid proposal, but the applicant is not required to use contractors from the City's list.

To be considered for subordination, the applicant's lender-selected closing agent must fax the following documents to the Housing and Community Development Division:

- Good Faith Estimate with the new interest rate and terms clearly stated,
- A copy of the Title Commitment for the proposed transaction,
- A copy of the Preliminary HUD-1 Settlement Statement,
- A copy of the contractor's itemized, written proposal (if cash is to be disbursed per above),
- A recent property appraisal (no older than six months)

In the event that the current first mortgage lender is modifying the existing first mortgage as part of a lender-approved default workout, the Title Commitment and Appraisal requirements can be waived if acceptable to the Division.

Upon approval of the proposed transaction by Housing and Community Development Division staff, the mortgage subordination will be prepared and forwarded to the City's Office of General Counsel. After legal review, the Subordination Agreement will be forwarded to the Mayor's Office for execution. The fully executed subordination agreement will be returned to the Division for recording in the public records.

Following the closing of the new loan transaction, the title/closing agent is required to forward to the Division a copy of the final, Executed HUD-1 for review. If the Final HUD-1 varies in any material manner from the Preliminary HUD-1, the City will not be required to record the executed subordination in the Public Records of Duval County, FL.

# Exhibit B

## Scoring Matrix

# Exhibit C

## Timeline for Encumbrance & Expenditure



# Exhibit D

## Housing Delivery Goals Chart (HDGC) for each year



# Exhibit E

## Certification Page

# Exhibit F

## Adopting Resolution (see Ordinance)

# Exhibit G

## Program Information Sheet

# **Exhibit H**

## **Ordinance**

### **(Local Legislation)**

# Exhibit I

## Inter-local Agreement (N/A)

# Exhibit J

## Administrative Budget